Salesforce Implementation FAQs 2.0 [1]

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Functionality & Capabilities

Q: Can we create a full list, then eliminate names based on individualized knowledge within Salesforce. I often do significant edits to the lists that advance will give me in a report - so i wonder if these Salesforce lists are able to be revised.
A: Yes, people can be removed manually from a list/campaign or through exclusion criteria.

Q: In the new system, am I able to add an outside list into an existing newsletter list? These are friends of CU, industry folks, wanting to stay updated. They would be coming in from a Harris Connect form.
A: The ability to create queries (or called "reports" in Salesforce) based on information that is generated from a form (event, membership, giving, etc.) and then send an email to that report list will be available in Salesforce when eComm is fully implemented, before Harris sunsets. The ability to upload email lists is technologically possible, but not recommended because Salesforce is not able to tie engagement activity (eg; email open rates, event RSVPs, etc. to the correct record (or called "contact" in Salesforce). This is important because you, as a communicator, want to be able to see the 360 view of a constituent to create new reports based on their engagement with CU.

Q: Will this tool have any online community building features? And if so, can you describe them?
A: For phase I, eComm will launch an alumni online community that will allow CU alumni

systemwide to update their profile, register for events, search a directory and identify email preferences. A component, called Chatter, will also be available. Chatter is a way to connect with like-minded alums in a content-feed manner. Each campus' communications department will lead that effort. Please reach out to your eComm specialist for campus-specific details.

Q: Will we be able to add new records to Salesforce from existing email lists that we currently have in Constant Contact of MailChimp?
A: We plan to set up a process where we take your list and match it against the database to ensure we are not adding additional contacts that may already be in Salesforce. This project is migrating nearly 1 million records from all of CU's source systems for alumni, donors, parents, students, faculty and staff. Because of this, the constituent's official record will already likely be in Salesforce. In those cases, the records may need to be updated (not added) with the data or contact information that's in your list.

Q: Will you be able to embed data tags within the e-mails? i.e, you have an appointment on 5/4/15 at 9:45 a.m. with Dr. Morris and Dr. Harris, and Dr. Salesforce?
A: Yes, if the data points are in Salesforce and can be mapped from the database to the email in Marketing Cloud.

Q: Will there still be times Advancement's Reporting team will be needed to create the data because it may be too "sophisticated" for us to create?
A: If there is a need to bring in additional data from Advance, this would need to be approved by University Relations, Univeristy Information Systems and the Center of Excellence. If this question refers to the ability for technical support to help create sophisticated list segmentations, then yes! A support model is being put in place to provide tier 1 -3 support for eComm users.

Q: On the email preferences for the alumni community will we be able to ask them if they want to sign up for our blog?
A: That is not within this phase' scope. It is specific to email marketing for emails that are generated from the Salesforce Marketing Cloud solution.

Q: Will we be able to build registration pages that accept credit card payments as soon as we complete the training in July?
A: Until November 18, you can utilize a Harris form to collect registrations and payment information.

Q: Will departments be able to share email drafts/sending privileges as sub-accounts with the same access to information?
A: Yes. There will be workflow functionality available to support cross user content sharing.

Q: When will email templates be available?
A: ACF Solutions in partnership with eComm will design and build 4 email templates with reusable content components/boxes. MECS will have the opportunity to begin building templates after they receive their training the week of June 8. All of these activities will take place on the ExactTarget marketing cloud side.

Q: Will we be able to change ucdenver shortened URL redirects to new Salesforce forms/registration sites?
A: We will document that as a requirement for the replacement solution.

Q: We have lots of contacts who are not affiliated with the university (not alumni, students, employees) we understand that the we will need to upload the list and then it will be maintained by salesforce to measure ROI but can we use Salesforce to send to them?
A: We will want to work with you on processing that information so that the individuals have their own contact in Salesforce, which you will then be able to send emails to them and measure ROI.

Database Integration

Q: For programs/department that already use SalesForce, what type of support will be available for merging the new system to exisiting, already built-out systems, w/out losing data?
A: We will evaluate requests and projects on a case by case basis to determine what data is already resident on the platform, what data will be migrated, and what historical data will not be migrated.

Future Phases

Q: Is there a strategy to reach out to other areas on campus that don't currently rely on Harris for their communications, but do send email communications to overlapping audiences?
A: Please forward your requests for additions/changes will need to go through your IT help desk support or your campus CRM analyst.

Q: What if the person is not in Salesforce? We will still have to use Constant Contact to communicate with them?
A: For contacts that are NOT in Salesforce, we will go through a different process to add them. While this may take time, it's important to take these steps to ensure CU retains a high quality and "clean" database.

Q: On the email preferences for the alumni community will we be able to ask them if they want to sign up for our blog?
A: That is not within this phase' scope. It is specific to email marketing for emails that are generated from the Salesforce Marketing Cloud solution.

?Database Management

Q: How will record duplication be managed and by whom. How will systems of record be updated? Will MDM (Master Database Management) be applied to managing the "golden" record of contact and relationship housed in eComm?
A: Yes. All source system IDs will be transferred. ?

Q: Does this mean confidential donor information is going to be seen from Advance?
A: No. The only "giving" information that is being migrated is an indicator that flags the constituent as a donor or not (Y/N). And, that field can be isolated based on a profile.

Q: When we receive alumni contact information updates, would we update their contact information here on their "object" in Salesforce or do we go to Advance as usual?
A: You will be able to update their contact information in Salesforce, which will populate Advance. Some specific information will not be shared with Advance initially. There are plans to enhance that bi-directional sharing over time.

Q: Will affiliations be expanded into professional development/non-affiliated contacts or do they need to have attended/worked on our campus?
A: There will be an employment "object" in Salesforce that captures BOTH CU employment information as well as constituent employment information.

Q: Will 'Do Not Email' and 'Do Not Contact' codes be transferred from Advance?
A: Yes. As per CAN-SPAM legislation [2], CU is legally required to transfer constituent preferences such as these.

Q: Will donor information and actions (contributing to an online appeal) be stored in Salesforce or in Advance or both?
A: Advance.

Event Registration

Q: Do you suggest that we pay for and use Regonline for the interim events for November, December, January, etc?
A: Event and membership management and giving forms will be replaced before Harris sunsets in November to ensure there is no gap in service.

Q: Is there going to be down time where we have no event management tool?
A: The plan is that there will not be a gap in service. You will be able to use Harris until it sunsets and a replacement will be available before then as well.

Q: Does Harris event forms also get turned off on August 7th(along with emails)?
A: Harris event forms will be turned off on November 18. Between Aug. 7 and Nov. 18, you will be able to send an email out of the Marketing Cloud, while including a link to the Harris registration form.

Q: We have events for which registration will be ongoing this spring, summer and fall. We need to know if 1)Harris' credit card acceptance functionality will continue until November, and 2) when we will be able to use a credit card acceptance portal with Salesforce.

A: You will be able to use Harris until November 18. A replacement that includes training will be available before Harris sunsets. We will provide updated information on the event registration tool, including credit card acceptance, on the eComm site.

Q: Will we be able to change ucdenver shortened URL redirects to new Salesforce forms/registration sites?
A: We will document that as a requirement for the replacement solution.

Timeline & Logistics

Q: When will we have access to design templates to prepare emails?
A: After training in July.

Q: Would it help to do the online Salesforce tutorials before July?
A: Taking the online Salesforce tutorials would be helpful, but it's important to note that they will not be customized to reflect CU's unique set up. You also need a license to access the training environment and won't be awarded a license until training by CU is complete. If you have access via another channel, please feel free to take the courses, just keep the aforementioned in mind.

Q: Will there be a user forum / community for users to share techniques, templates, and so forth?
A: Each campus will have a user group that meets regularly to calendar, share best practices, answer questions, provide additional training, etc. Reach out to your campus eComm specialist for details. We are also discussing an annual or semi-annual system wide gathering.

Q: Will the All user training be online?
A: We will record all of the in person trainings and make them available via the eComm website. Ideally we want each person to attend the in person training to have the opportunity to ask questions, complete hands on exercises and learn the new tools without the distractions of their every day jobs.

Q: If we're unable to make the July training, when can we schedule makeup sessions to receive training and credentials?
A: We strongly encourage users to attend the eCommference in July. CU's implementation partner, ACF Solutions will conduct this in-person training. Access to Salesforce will only be awarded after users have been trained.

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Q: We were previously told we didn't need to attend all 3 days of the conference. is that still the case?
A: The eCommference scheduled for July will only require one day of participation. Three days of training are offered to allow users to select a day that works best with their schedule.

Groups audience: