eComm Roadmap [1]

Each year, the eComm and CRM teams obtain feedback from the campuses that drives implementation and enhancement efforts. Our governance process [2] is collaborative and accounts for feedback from users, eComm specialists, and campus leadership.

We look forward to working together to continue enabling CU's communicators and event planners to make the most of their outreach efforts while improving the ability to customize based on constituent interests and preferences.

- FY25 In Progress
- FY25 Completed
- FY24 Completed
- FY23 Completed
- Ongoing Backlog
- Canceled / Held / Pending Prioritization

- **Cvent User Fee Review** | Operational Management
  Review Cvent user fee calculation process and explore alternative models based on user counts, registration activity, paid/free events, etc.

- **Marketing Cloud Subscriber Table Maintenance** | Operational Management
  ?We will research and implement subscriber table management practices to improve operations at scale.

- **SSO for Marketing Cloud and Cvent** | Improve Security
  We will move to single sign on (SSO) for both Marketing Cloud and Cvent to comply with CU's security requirements.

- **CU Boulder SAP** | Bulk Sender Compliance
  Implement Boulder-specific SAP to allow for a custom domain while continuing compliance with bulk sender regulations.

- **2024 Bulk Sender Requirement Changes** | Keep inboxes safe and SPAM-free
  Ensure that Marketing Cloud is technically configured to support delivery in compliance with new Gmail and Yahoo regulations.

- **Do Not Contact** | Integrate Do Not Contact field
  We will work to integrate the do not contact field from Advance/Ascend to Salesforce to reduce the need for manual data loads and increase the accuracy of data.

- **Email Opt-Out Field** | Create bidirectional integration for email opt-out data

We will work to create a bidirectional integration for the global email opt-out field between Salesforce and Advance/Ascend to eliminate the need for manual data loads and increase accuracy.

- **eComm Specialist Education & Enablement** | Increase adoption of Marketing Cloud features for strategic marketers
  - Basic: Audience creation quizzes (rolled out in Nov. and Dec. 2023) are a pre-requisite for attending advanced sessions.
    - Campaigns, Campaign Members, and Apsona
    - Reports
    - Data Extensions
  - Advanced: Offer opportunities for strategic marketers to effectively use Marketing Cloud technology including
    - Dynamic Content
    - Automation Studio: Importing Data Extensions
    - Subscriptions
    - Analytics: Tracking, Intelligence Reports, Einstein, and Salesforce Dashboards. Sessions start in Feb. 2024.
  - Peer Presentations: Share at a monthly eComm specialist meeting
    - Managing the eComm program at UCCS, Kayla Boyer & Eric Nissen
    - CU Denver Alumni Benefit from Cvent and OnArrival, Monica Cutler
    - Super Users at CU Anschutz, with Kelly Miller

- **POI Data** | Integrate POI Data
  We will integrate POI data with Salesforce to gain a more complete picture of this audience and will adjust audiences accordingly. This data is ready to be made available once the eComm specialists prioritize it and have the capacity to update nearly 1,500 impacted Reports.

- **User Continued Education & Enablement Sessions** | Increase user skills and overall program engagement
  - Monthly New User Newsletter with Dynamic Content
  - Chatter / Collaborative Communities

- **Anschutz Super User Pilot** | Expand access to specific features and functionality
  Launch super users for schools/colleges to create audiences and approve events in alignment with Anschutz email and event policy.

- **Business Unit & Preference Optimization** | Share Business Units and consolidate Preferences
  Implement a simplified Marketing Cloud business unit and preference model across the campuses to reduce costs, streamline the constituent experience, and decrease the level of backend management needed.

- **Event Management** | Identify cost-effective solutions
  Gather requirements and work to identify a simple, cost-effective event management solution, particularly for users with simple, free events.

- **Selected Boulder Users Migrating to CRM01 & MC01** | Streamline engagement with

CU Boulder student audeince
Migrate selected senders engaging with student to a campus-specific implementation.**?**

- **Billing Fields** | Create new billing fields on the license
  We will create several new billing fields on the license object to streamline the billing process for all campuses, including those with a distributed funding model. New fields will also account for charges to multiple speedtypes.

- **Billing Process** | Launch new billing process in UIS
  We will launch a new billing process in UIS using the new billing fields that will increase accountability and transparency for all license charges. We will continue to accept feedback throughout the year and make incremental changes as needed.

- **Bounced Emails** | Streamline bounced email data flow
  We will identify a streamlined approach for the management of bounced and inactive email addresses, including identification and removal from Advance/Ascend. Additionally, determine the automated process to reactivate inactive subscribers in Marketing Cloud when a new email address is added to the contact record.

- **Cvent Licenses** | Purchase additional licenses
  We will purchase additional Cvent licenses to accommodate ongoing growth in the user base.

- **Cvent Integration** | Improve the CV-SF integration
  We will work with Cvent to troubleshoot and correct previous integration issues and populate data that was not initially sent to Salesforce.

- **Cvent Payment Issues** | Improve financial reconciliation
  We will work to streamline speedtype and account code selection to reduce reconciliation time.

- **Data Extension Automation** | Reduce the need to import data extensions
  We will offer opportunities to automate data extension imports to increase audience accuracy and CAN-SPAM compliance.

- **Dynamic Content** | Allow for customized email content
  We will create opportunities for the broad use of dynamic content through the synchronization of Salesforce objects and will conduct training accordingly.

- **Einstein Enablement** | Enable Einstein for Marketing Cloud
  We will conduct an Einstein pilot in Marketing Cloud to assess overall business value, particularly in conjunction with journeys.

- **GeoCode Sunset** | Sunset the use of two fields in Salesforce
  We will sunset the use of GeoCode and GeoCode Description in anticipation of its source (Advance soon to be Ascend) sunsetting the field during migration (June 1 launch).

- **Intermediate Training** | Provide Cvent intermediate training

We will create and provide intermediate training for Cvent users to increase enablement and reduce reliance on eComm specialists.

- **Journey Builder** | Conduct Journey Builder pilot
  We will conduct a Journey Builder pilot in conjunction with synchronized data, dynamic content, and automation prior to a rollout for advanced marketing users. This will include opportunities to identify and segment unengaged constituents.

- **Multifactor Authentication** | We will enable MFA in Marketing Cloud
  Per SFMC requirements, we will fully enable multi-factor authentication for users.

- **New User Journey** | Increase the skillset of new users
  We will develop a journey for new eComm users that will continue their education post-onboarding and that will address more advanced topics, such as A/B testing, designing for mobile, and accessibility.

- **Opt-Out Audit** | Ensure accurate opt-out data for all preferences
  We will work to customize new user onboarding communications with Dynamic Content to streamline the new user process and reduce time spent on manual tasks.

- **Onboarding** | Customize onboarding outreach
  We will work to customize new user onboarding communications with Dynamic Content to streamline the new user process and reduce time spent on manual tasks.

- **Page Layout** | Improve page layout on Salesforce objects
  We will clean up the page layout for all Salesforce objects including removal of unnecessary fields and reorganization of existing fields based on eComm business cases.

- **Preferences Audit** | Audit all preferences for accuracy
  We will conduct a complete audit of the existing email preference solution and determine inconsistencies, inaccuracies, and where corrections should occur.

- **Preferences Solution** | Explore new preferences solution
  We will gather requirements and begin exploring alternatives to our current email preferences solution, including the potential restructuring of CU's existing preference model.

- **Preferred Name** | Allow for preferred name personalization
  We will integrate preferred name data from CU source systems to allow for improved audience personalization. We will create corresponding preferred name personalization options in Marketing Cloud that include default values for auto-population in cases where the preferred name is blank.

- **Provisioning Flow** | Create new provisioning flow
  We will create new, modern provisioning flow to capture monthly eComm user changes. This will include the ability to view current license information, request new speedtypes, and provide billing notes. Additionally, eComm specialists will now upload Skillsoft verification directly to the files option on the license.

- **Salesforce-Only License** | Create Salesforce-only license tier
  We will work to create a Salesforce-only license tier to increase access and affordability for campuses.

- **Subscriber Management** | Improve subscriber management
  We will identify opportunities to improve the management of the subscriber table to reduce storage costs, such as the removal of subscribers who no longer have an active email address in Salesforce.

- **Subscriber Reactiviation** | Automatically reactivate subscribers
  We will develop a process to automatically reactivate inactivated subscribers who are active employees and/or active students to improve email deliverability while investigating the cause of the bounce.

- **Synchronized Data** | Enable synchronized data in Marketing Cloud
  We will enable synchronized data in Marketing Cloud to allow for improved use of Dynamic Content and Journey Builder.

- **True-Up Process** | Improve bi-monthly true-ups
  We will work with UIS services to identify an appropriate process for bi-monthly true-ups based on feedback from the campuses.

- **VPN Restrictions** | Remove VPN login restrictions
  We will remove VPN restrictions for login to Salesforce and Marketing Cloud.

- **Additional Emails** | Add more email addresses to contact
  We will work to integrate additional, relevant email addresses with the contact record, such as CU Anschutz email address and CU Hospital email address. This will allow for greater segmentation of audiences and increased engagement.

- **Align Marketing Cloud Implementations** | Reduce the number of Marketing Cloud implementations
  We will work to consolidate communications in a single Marketing Cloud implementation to increase actionable data and reduce duplicative spending.

- **Athletics Data** | Add athletics data to the interest object
  We will work to identify the source of athletic participation data and integrate it with the appropriate object in Salesforce to allow for interest-based outreach.

- **Automation of all DEs** | Automate all data extensions
  We will pilot the automation of the majority of data extensions on campus or campuses to eliminate the need for manual imports prior to every send.

- **Certificate Data** | Add certificate data to the education object
  We will work to integrate certificate data (both degree and non-degree) with the education object in Salesforce to allow for more granular outreach to specific educational groups.

- **Club/Interest Data** | Add club/interest data to the interest object

We will work to add relevant club and interest data to the interest object in Salesforce to allow for interest-based outreach.

- **CU Ascend Cvent Integration** | Improve Data Availability for Advancement
We will work with CU Advancement to determine how to capture event data in CU Ascend.

- **CU Ascend Marketing Cloud Integration** | Improve Data Availability for Advancement
We will work with CU Advancement to determine how to connect CU Ascend data to a multi-org Marketing Cloud implementation.

- **Email Deliverability** | Improve email deliverability
We will research and identify measures to improve email deliverability, such as Litmus, ReturnPath, etc.

- **Email Preference Flow** | Create Salesforce flow for email preferences
We will create a Salesforce flow for the quarterly email preference and business unit request process to streamline submissions and increase accuracy.

- **Military Affiliation** | Identify contacts with military affiliation
We will determine if it is possible to integrate military affiliation data for audience segmentation and targeted outreach.

- **Parent/Relationship Data** | Improve parent data in Salesforce
We will identify improved measures to collect and maintain parent data in Salesforce, including relationship data (i.e. Parent A is related to Student A, who is related to Alumnus A).

- **Scholarship Data** | Integrate scholarship data
We will identify a mechanism for the integration of scholarship data with the scholarship object in Salesforce to allow for targeted communications and outreach.

- **Unengaged Subscribers** | Segment unengaged subscribers
We will determine a way to identify unengaged subscribers for the purposes of strategically excluding them for certain types of outreach and/or placing them in a re-engagement campaign.

- **Distributed Marketing |** Enable "simple send" for non-marketing users
  - We will investigate and launch a "simple send" mechanism for communicators who do not have advanced marketing needs to improve efficiency and reduce reliance on eComm specialists.
  - ***Held***: *Due to decreased functionality, equal costs, and significant change management eComm collectively opted against pursuing this path.*

- **?GeoPointe |** requested from Boulder Alumni only?

- **AmpScript |** requested from Advancement only

- **GeoCode Data |**

Integrate Geocode data
- ○ We will integrate Advance/Ascend geocode with Salesforce to eliminate the need for manual data loads and create more accurate data.
- ○ ***Canceled****: GeoCode not migrating to Ascend. See 'GeoCode Sunset' under the first 'Completed' tab, instead.*

- **Subscriber Status** | Add subscriber status to contact object
  - ○ We will determine if there is a way to add Marketing Cloud subscriber status to the Salesforce contact object to increase the ease of sending troubleshooting.
  - ○ ***Canceled****: This is not possible based on our research.*

Groups audience:
eComm

Source URL:https://www.cu.edu/ecomm/strategy/ecomm-roadmap

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