eComm/Pharmacy Support Transition | 2022 [1]

2022

TRAN

CU eComm & C

Every day, communicators throughout the CU System rely on eComm [5] to build and strengthen relationships with their constituents, including students, alumni, donors, faculty, and staff. An integral component of these efforts is technology support to ensure that Salesforce, Marketing, Cloud and Cvent work in concert with one another and with minimal technical disruption.

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WHAT & WHY

The eComm/Pharmacy Support Transition will migrate ongoing support and billing for Salesforce (CRM03), Marketing Cloud (MC03), and Cvent environments from the CU Boulder Web and Enterprise CRM team to the UIS CRM team. As CRM-related initiatives have continued to grow across CU, teams supporting this work are continuing to assess where support for enterprise-wide activities is best housed. Aligning CRM03, MC03, and Cvent with other CRM-related initiatives in UIS will allow for increased strategy, enhanced knowledge sharing and alignment, and potential cost savings and transparency related to enterprise

contract management.

WHEN

The teams intend to transition eComm/Pharmacy services by June 30, 2022. The transition will occur in three phases. Phase one will involve planning for the transition and identifying work that will occur to complete it successfully. Phase two will involve information gathering, documentation, and training. Phase three will be a warranty period during which UIS CRM will manage the eComm/Pharmacy applications but will still have support from the CU Boulder Web and Enterprise CRM team if needed.

HOW

Since the three primary eComm/Pharmacy applications are cloud-based, a "lift and shift" approach will guide the transition. The CU Boulder Web and Enterprise CRM team will partner with both the eComm/Pharmacy teams and the UIS CRM team to ensure that the transition approach is collaborative and strategic while occurring with no anticipated disruption of service for eComm/Pharmacy users.

IMPACT

The support transition will not impact the day-to-day workflows of eComm/Pharmacy users nor the availability of applications and resources. Existing support processes will remain in place for end users and eComm specialists. Learn more about the transition details on the FAQ tab.

TIMELINE

The teams intend to fully transition the eComm/Pharmacy services by June 30, 2022.

The transition will occur in three phases.

Phase One
Planning

- CU Boulder and UIS teams determine intent to transition by end of FY22
- eComm team develops transition timeline (including training, communications, and documentation needs)
- eComm team develops communication plan and transition website
- eComm team identifies customers and stakeholders for communication

Phase Two

Information/Documentation Gathering & Training

- CU Boulder Web and Enterprise CRM team provides documentation on key elements of the existing support infrastructure
- CU Boulder Web and Enterprise CRM team provides training to identified team members on the eComm and UIS CRM teams with the goal of transitioning support for each as the training is completed
- CU Boulder and CU System financial and budgeting teams will work with the eComm and CU Boulder Web and Enterprise CRM teams to develop a plan to transition the eComm/Pharmacy budgets and billing cycles to UIS

Phase Three
Warranty Period and Implementation of Financial Structure

- Warranty period for key technology and support
- Implementation of budget and billing processes in UIS

PROGRESS

Planned for June 2022:

- Finalize MOU between UIS and CU Boulder for management of CRM01 Cvent users
- Send budget stakeholder update
- Send program-wide transition announcement

Completed in May 2022:

- Development of ongoing communication plan with campus budget stakeholders
- Finalize MOU between UIS and CU Boulder for complete transition of service

Completed in April 2022:

- Service warranty period begins in UIS
- Development of forecasting model for eComm and Cvent user fees through FY25
- Announcement of FY23 eComm and Cvent user fee

Completed in March 2022:

- Knowledge transfer regarding:
    - Cvent duplicate management and merging process
    - Draft governance model
    - Email preference additions and changes
    - FTP administration
    - IER archival process
    - Integration management
    - Marketing Cloud connector administration
    - MC03 to MC01 global email out out process
    - PharmCAS management and configuration
    - Pharmacy duplicate management and merging

- Pharmacy jounrney administration
- Pharmacy RFI form
- Playable administration
- Sandbox creation and management

Completed in February 2022:

- Launched UIS initiative to assist in managing the transition and to ensure that proper support is available
- Provisioned key support team members in additional applications
- Began conversations with UIS and CU Boulder budget teams
- Knowledge transfer regarding:
    - Apsona administration
    - Business unit administration
    - GeoPointe administration
    - Email preference deletion
    - Form Assembly administration

FAQ

While we do our best to anticipate all of the questions you might ask, we recognize that we likely did not capture all of them. If you have a question or concern not addressed below, please reach out to us for assistance [4].

General

Will there be an impact to negotiations with vendors?

Contract negotiations for eComm's Salesforce (CRM03) and Marketing Cloud (MC03) orgs for FY23 will be managed in UIS. The Cvent contract for FY23 was already negotiated in December 2021.

How does this transition relate to work associated with NextGen/Ascend and other CRM-related initiatives?

Work occurring for NextGen and other CRM-related initiatives is taking place in different orgs, so the support transition will not impact those groups. We are, however, having conversations about how all of these initiatives intersect so that we can continue to plan strategically for the future.

When will we have more information about support model changes associated with the transition?

From the eComm/Pharmacy user level through the eComm specialist level, there will be no

changes to the existing support model. Users will still work primarily with their eComm specialist, who will escalate unresolved issues to the System eComm team. When needed, the System team will work with the UIS team toward a resolution.

What is the eComm roadmap for the future?

We've been keeping a list of desired enhancements based on feedback from our users and eComm specialists. Beginning in April 2022, we will revisit our backlog of requests to prioritize work for FY23. Once a roadmap has been agreed to, we'll share it on the eComm website and in communications to users and stakeholders.

What kind of support can I expect from the UIS CRM team?

This UIS CRM team is highly skilled in all eComm/Pharmacy applications. The support we expect to receive will be commensurate with the support we've had in the past, although we hope that additional full-time staffing resources will allow us to work toward our desired future state while continuing to address day-to-day issues as they arise.

Budget and Billing

Will the eComm user fee change based on the support transition?

There will be no change to eComm rates from FY22 to FY23.

When will we know about the eComm user fee rate for FY23?

There will be no change to the eComm user fee for FY23. Salesforce and Marketing Cloud will remain $3,498/user, and Cvent will remain $1,877/user).

How will the eComm user fee be communicated to the campuses?

The UIS budget team will be conducting a full process assessment as part of the support transition, including the need for ongoing communication with the campuses. We recognize that the campuses have requested improved communication regarding budget and rate setting, and that request is a priority that will be addressed during the transition.

What changes should we expect with the annual billing cycle?

We'll be making decisions regarding changes to the annual billing cycle in spring 2022 and will contact our campus budget partners as decisions are reached.

Technology / Applications

Will there be any scheduled downtime associated with the transition?

No downtime will be needed as part of the transition.

Will my login information change?

No login changes will occur as part of the transition.

Will there be any changes to existing functionality?

No. All functionality as users experience it today will remain available.

CU Boulder CRM01/MC01 Users

I am a CRM01/MC01 user at CU Boulder, and I also use Cvent. Will I still be able to access Cvent with this transition?

Yes. Although we are still addressing specific details associated with CRM01/MC01 Cvent users, they will not lose access to Cvent functionality.

If I have a support question about Cvent after the transition, how will it be addressed?

We'll provide more information about the support model as the transition progresses, but CRM01/MC01 Cvent users will still work with their eComm specialist to address issues.

TRANSITION TEAM

Questions about the work taking place for the eComm/Pharmacy support transition? Please contact us [4] for assistance.

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STAKEHOLDERS

While the support transition will not change the day-to-day experience for eComm/Pharmacy users, we are cognizant that there are many key teams and individuals involved in the transition. Primary stakeholders are listed below.

Primary Teams

- CU System eComm Team
- CU Anschutz School of Pharmacy Team
- CU Boulder Web and Enterprise CRM Team
- CU System UIS CRM Team

Secondary Teams

- CU System UIS Service Strategy and Service Delivery Teams
- Campus eComm Specialists
- Selected eComm/Campus Stakeholders
- CU Boulder and CU System Financial Teams

For a campus breakdown of the individuals involved in the transition, expand the sections below.

Advancement

- Jason Hunter, CIO and Associate Vice President
- Katie Theiler, Digital Marketing Manager
- Serwaa Adu-Tutu, eComm Specialist

Anschutz

- Shannon Hopkins, Strategic Communications Specialist
- Kiley Kudrna, Communications Specialist
- Ryan Nisogi, Assistant Vice Chancellor of Marketing and Communications
- Justin Rowe, Senior Recruiting Strategist
- Christopher Smith, Vice Chancellor, Information Strategy and Services
- Jason Thomas, Strategic Communications Manager
- Lori Westerman, Director of Marketing

Boulder

- Tracy Berger, Business Analyst
- Lisa Carr, CRM Program Manager
- Erin Frazier, Assistant Vice Chancellor of Constituent Engagement
- Sravanth Gampa, eCommunications Professional
- Rebecca Lankford, DevOps Manager
- Jon Leslie, Senior Associate Vice Chancellor of Strategic Communications and Chief Communications Officer
- Christopher Littlefield, Sr CRM Analyst
- Tom Needy, Sr. E-Communications Manager
- Sarah Rhode, Finance Analyst
- Marin Stanek, Sr. Associate Vice Chancellor for IT and CIO

Colorado Springs

- Kayla Gronseth Boyer, ??eComm Program Manager
- Josh Husman, Development Coordinator

- Harper Johnson, Assistant Vice Chancellor for Technology and Human Resources
- Eric Nissen, Associate Director, Marketing and eCommunication

Denver

- Karen Klimczak, Assistant Vice Chancellor, Marketing and Brand
- Laura Morris, Associate Vice Chancellor and Chief Information Officer
- Gordy Sauer, Director of Executive Communications
- Kristin Goosen, eComm Specialist

System

- Ridawn Cummings, Senior Director
- Marc Donohue, Salesforce Online Program Administrator
- Claire Hamilton, Web Marketing Analyst
- Joanna Iturbe, Enterprise CRM Director
- Melanie Jones, eComm Training Manager
- Aaron Mansfield, Assistant Vice President, IT Service Strategy
- Scott Munson, CIO and Associate Vice President
- Paula Ramirez, Assistant Director of Business Services
- Milap Sharma, Assistant Vice President Of Service Delivery
- Daniella Torres, eComm Data Analyst

Groups audience:
eComm

Source URL: https://www.cu.edu/ecomm/strategy/ecommpharmacy-support-transition-2022

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