MEC Weekly Digest | February 24, 2020 [1]

February 24, 2020 by jennifer.mortensen [2]

Good News to Celebrate

- **Training | Dashboard** [3]
    - **Cvent Flex Training at System and UCCS**: To date, we've conducted Cvent Flex training at System and at UCCS. The response has been positive, and we are looking forward to the upcoming training sessions at Anschutz and Boulder.
    - **In-Person New User Training**: Users who attend in-person training have a 100% quiz pass rate vs. a 57% quiz pass rate for those who choose the on demand training path.
    - **Intermediate Training**: Melanie Jones has continued to travel across the campuses to host in-person Intermediate Training for Salesforce & Marketing Cloud users. We have hosted five trainings with 50 total attendees. Email Melanie Jones [4] to bring Intermediate Training to your campus.
    - **Pharmacy Training Pilot**: Jennifer Mortensen and Melanie Jones are working with the CU Anschutz School of Pharmacy to roll out additional Marketing Cloud training based on a user assessment [5] we've asked team members to complete. We are hoping that this model might set the stage for additional Marketing Cloud training or user groups on the campuses.
- **Accessibility Training at UCCS**: The UCCS eComm team recently hosted an amazing accessibility training [6] coupled with a knowledge check [7] that was required for all Marketing Cloud users. The team did a great job tying back the content to the campus mission, as well as to specific examples of student (and other) populations who benefit from adhering to accessibility best practices. Great job, Eric and Kayla!
- **New eComm Website at CU Anschutz**: Jason Thomas and his team recently rolled out a new eComm website for CU Anschutz [8]. The site includes information about request turn-around times as well as a ticket submission form [9] to help streamline and prioritize requests. Great work, Jason!
- **Email Preferences**: Nonie Roberts and the COE team are nearing completion of work on the email preferences we requested for Q1 of CY20. Thanks to Nonie and her team for the great work!

Reminder: Marketing Cloud Downtime

- **Reminder**: Nonie Roberts and Jen Mortensen will be attempting another connector

repair on **Friday, February 28 from 7 p.m. - 10 p.m.** We sent an announcement to users about the downtime on Thursday, February 20 and plan to send reminders on both February 27 and February 28. We will also send a notification message when the downtime is complete.

Preference Visibility Issue for Users

- **Issue**: One of Tom Needy's users uncovered an issue with user visibility settings for email preferences (see <u>INC0634308 - Urgent: eComm Security Change</u> [10] in TaskRay for screen shots).
- **Impact**: Users are encountering email preferences where contacts appear to be opted in and opted out at the same time. However, if MECs or admins view the same contact's preferences, everything appears as normal (opted in or opted out, not both). Given that visibility for MECs and admins is correct, we do not believe that there is a problem with how preferences are functioning, but rather that this is just a field visibility issue.
- **Solution**: Jen Mortensen submitted a ticket to the COE and Ilene Mesnard and Nonie Roberts who are working on a solution.

Users Adding Contacts to Salesforce

- **Issue**: We are encountering situations in which users are creating contacts in Salesforce using the "New" button on the contact tab without going through their MEC. (We were unable to remove the new button without affecting other functionality that we actually need).
- **Impact**: Since users are creating contacts without the account name or record type, the contacts that they add have an extremely low likelihood of ever being included in communications as intended.
- **Solution**: Daniella Torres is conducting a weekly audit of new contacts that are added to Salesforce and working with the users and their MECs to correct the issue by deleting the contacts that were added incorrectly and having the MEC add them to Salesforce according to standard processes. We will feature this topic in our February eComm newsletter to encourage awareness and compliance.

eComm Communications to Stakeholders

- Jason Thomas had the great idea of including a few key stakeholders from CU Anschutz in our MEC Weekly Digest and in the monthly newsletter to increase their awareness about what is occurring within the eComm program. Great idea, Jason!
- If you have stakeholders on your campus who would like to receive any eComm communications, please contact <u>Jennifer Mortensen</u> [11] so she can add them to the reports.

Ongoing TaskRay Tasks & Data Monitoring

- <u>TaskRay Dashboard</u> [12]
- <u>All TaskRay Tasks</u> [13]
- <u>Data Issues Dashboard</u> [14]

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