MEC Weekly Digest | July 27, 2020 [1]

July 27, 2020 by jennifer.mortensen [2]

Teaming Up: Salesforce Partners Hear eComm Voices

- **Update**: In the early parts of 2020, the four campus eComm program successfully navigated the early parts of understanding what COVID meant for our university. A part of that success was navigating around outages to the Marketing Cloud tool and working directly with explaining this impact alongside the COE to our partners at Salesforce.com. Teaming up across the four campuses and working directly with the COE, the campus MECs outlined user impact that has driven conversations with our vendor partners about service levels and support needed from our vendor based customer support team. Further, the user impact that was gathered was utilized successfully during our negotiation period.

Contact Update Form

- **Update**: As discussed at last week's MEC meeting, Jen Mortensen made some improvements to the contact update form [3] that is accessed from the CU Footer for All Emails. The changes will make the form easier for constituents to navigate and easier for the System team to process. The new form is now live and accepting submissions.

Salesforce Chatter Free Licenses

- **Update**: As mentioned in the July 13 digest [4], we've been working to implement a Salesforce-based notification system for all eComm users so that we can more easily communicate about outages (particularly when Marketing Cloud is down).
  - **SFMC Users**: The solution was already implemented for Salesforce Marketing Cloud users and was used successfully during last week's outage.
  - **Cvent and Cvent-only Users**: Daniella Torres determined that the only way we could add Cvent-only users to a Salesforce-based notification group was to implement Chatter Free Licenses, since Cvent-only users do not have a Salesforce user. Daniella completed testing this week and we will complete the creation of the Cvent notification groups on August 7.

Dashcord Pilot

- **Update**: As mentioned in the <u>July 20 digest</u> [5], Lisa Carr completed an upgrade of Dashcord to enable the needed functionality for our pilot. Additionally, Lisa and the Dashcord team determined that custom code would be required to enable matching on multiple email addresses. Dashcord completed the custom code build, and testing to date has yielded positive results.
- **Next Steps**: Lisa Carr is preparing for an updated demo with the project team (Melanie Jones and Jennifer Mortensen).

Salesforce-Only Licenses

- **Update**: As you know, we've been speaking with the COE about the opportunity to develop a Salesforce-only license for users who need access to Salesforce but not Marketing Cloud (currently these licenses are bundled). The COE is working toward a better solution for Salesforce-only users and is in the process of assessing options. We hope to have additional information very soon.

COE Billing Timeline

- **Update**: Thanks to all of you who spent time gathering information from your campus re: preferred eComm billing cycles. Jennifer Mortensen proposed the dates/times below to Jill Ibeck and Angie Naillon, and they will be meeting to discuss feasibility in the near future.
  - **July**: Discrepancies in license charges for the previous FY corrected
  - **September**: OIT contacts eComm to conduct initial review of license estimates for the next FY
  - **October**: Rate estimates established for the next FY; any substantial changes communicated to the campuses
  - **February**: OIT contacts eComm to conduct final review of license estimates for the next FY
  - **March**: Rates finalized for the next FY and communicated to the campuses
  - **April**: Estimated charges for the current FY are finalized and communicated to the campuses
  - **June**: Final charges posted to the campuses for the current FY

Subscription Form Pilot

- **Update**: Nonie Roberts determined that one proposed alternative to Cvent subscription forms could be a Marketing Cloud-based subscription form. After gathering requirements from the project team (Jessica Raab, Amber, Bartlett, and Jennifer Mortensen) and additional conversations with Marketing Cloud, Nonie determined that the proposed solution would not address identified requirements, particularly those related to contact matching/duplicate creation avoidance.
- **Next Steps**: In an upcoming sprint, the COE will explore other development options for a Cvent subscription form alternative.

IER Archiving to Begin

- **Update**: As we've already agreed, we will store IER data in Salesforce for three months (in accordance with industry best practices and to help better manage Salesforce

storage). The COE will archive IER data older than three months.

- ○ **CRM03 Archiving**: IER data for CRM03 has not yet been archived, so we are currently storing all IER records since migration. The COE will begin archiving IER data older than three months during the coming weeks.
- ○ **Note re: IERs vs. Email Send Data**: Archiving IER data is not archiving Email Send Data - the Dashboards we rolled out will still go back to May 2019.

Ongoing TaskRay Tasks & Data Monitoring

- TaskRay Dashboard [6]
- All TaskRay Tasks [7]
- Data Issues Dashboard [8]

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