

## **MEC Weekly Digest | November 7, 2022** <sup>[1]</sup>



November 8, 2022 by [jennifer.mortensen](#) <sup>[2]</sup>

### **Campus User Groups**

- **Anschutz:** In response to a survey to Anschutz users, Jason Thomas and team kicked off monthly lunch and learn sessions. Checkout the [presentation and recording](#) <sup>[3]</sup> from the well attended Sept. session on email best practices.
- **UCCS:** Kayla Gronseth Boyer and Eric Nissen have also been hosting monthly lunch and learn sessions. Checkout materials from the Sept. session to review email and event best practices including three checklists for quick reference:
  - [Marketing Cloud Email Checklist](#) <sup>[4]</sup>
  - [Cvent Build Checklist](#) <sup>[5]</sup>
  - [Event Strategy Checklist](#) <sup>[6]</sup>

### **Super Users**

- **Update:** As mentioned in the Oct. MEC meeting, we are exploring increased, specialized user access for high-frequency users to alleviate eComm specialist tasks.
  - **Manage Campaigns:** If a Report or Data Extension is based on a Salesforce Campaign and requires frequent, small changes, [all Salesforce users can manage Campaign Members \(and even add new contacts\) without involving an eComm specialist](#) <sup>[7]</sup>.
  - **Cvent Portal Manager:** Users who regularly need Reports published to the Portal can have Cvent Portal Manager access. We've reached out to good candidates based on the number of Reports currently published to the Portal. Let [melanie.jones@cu.edu](mailto:melanie.jones@cu.edu) <sup>[8]</sup> know if you have a user in mind that hasn't been identified.
  - **Cvent Event Approval (free):** As a pilot, users who have hosted more than 10 free events in the last 6 months have been invited to a Nov. 14th session to review the [Cvent approval checklist](#) <sup>[9]</sup> and get access to approve events. If all goes well we will expand to another group; users who have hosted more than 8 free events in the last 6 months.

### **Access to Submit License Changes**

- **Action:** As follow-up from our Sept. MEC meeting, eComm specialist who are

responsible for license changes need access to the work-flow in Salesforce to complete this task. Access will be granted after reading the license change wiki and passing a short quiz <sup>[10]</sup>.

## CRM Team Structure Changes

- **Update:** eComm specialists and stakeholders received an email from Aaron Mansfield <sup>[11]</sup> regarding changes to the CRM team structure in UIS.
- **Summary:** UIS has traditionally been divided into two reporting structures: service strategy (where me, Mel, and Lauren have been housed) and service delivery (where Jeff, Claire, and Daniella have been housed). Our new CRM team structure brings all of us under the same team umbrella to increase efficiency. See org chart below.
- **Jen Mortensen's New Role:** Jen will be serving as Interim Director of CRM in addition to her current eComm responsibilities (some of which Mel and Lauren are graciously taking off my plate).
- **New Service Areas:** This change brings multiple CRM-related service areas under one umbrella so we can more effectively address the holistic nature of CRM. UIS services now under the CRM team umbrella include assessment and analysis, technical implementation, marketing strategy, copywriting, graphic design, web experience, and user enablement.
- **Overall CRM Landscape:** This change will also give eComm a more prominent seat at the table in conversations surrounding various CRM implementations both enterprise-wide and at the campus level. We're excited about the opportunities that this change presents to work more strategically together in the larger CU CRM context.

## Marketing Cloud: Datorama now 'Intelligence Reports'

- **Datorama Overview** <sup>[12]</sup>: While functionality has remained the same, Datorama has been renamed to 'Intelligence Reports' (found under Analytics Builder).

## Ongoing Opportunities

- **Einstein** <sup>[13]</sup>: Big thanks to Lauren Galena for providing a real-time overview of Einstein at our Oct. MEC meeting. The recording has been published to the wiki and we'll continue to explore Einstein's capabilities based on activation in several business units.
  - Users in a Business Unit with Einstein enabled will receive an invitation for an overview on Tuesday, Nov. 15 from 11-11:30 AM.
  - If you'd like to have Einstein enabled in a specific business unit, add details to the Request Einstein spreadsheet by submitting a help ticket <sup>[14]</sup> and selecting "Marketing Cloud >> Einstein" (no need to actually submit the ticket).
- **Journey Builder** <sup>[15]</sup>: Big thanks to Claire Hamilton for providing three examples of current Journey Builder pilots at our Oct. MEC meeting. The recording has been published to the wiki and the team is eager to explore additional use cases. Find next steps by submitting a help ticket <sup>[14]</sup> and selecting "Marketing Cloud >> Journey Builder, Dynamic Content or Automation Studio" (no need to actually submit the ticket).
- **Dynamic Content** <sup>[16]</sup>: Resources for Dynamic Content are now available and MECs or users are welcome to work directly with Melanie Jones to implement their use cases. With their access, MECs can leverage Dynamic Content on their own.
  - If you'd like to work with Melanie Jones on a Dynamic Content example, add details to the Dynamic Content spreadsheet by submitting a help ticket <sup>[14]</sup> and

selecting "Marketing Cloud >> Journey Builder, Dynamic Content or Automation Studio".

## New/Updated Wikis and Resources

- [Checklists](#) <sup>[17]</sup> (updated)
- [Dynamic Content](#) <sup>[16]</sup> (new)
- [Journey Builder](#) <sup>[15]</sup> (new)
  - [Success Story: UCCS Alumni Association Optimizes Birthday Emails With Journey Builder](#) <sup>[18]</sup> (new)
- [Einstein Overview](#) <sup>[13]</sup> (new)
- [Marketing Cloud Tracking](#) <sup>[19]</sup> (update)
- [Roadmap Website](#) <sup>[20]</sup>: To more effectively share progress on the eComm roadmap, we have launched a roadmap website that will showcase details on work that is completed, in progress, planned, or in the backlog.
- [Submit Help Ticket](#) <sup>[14]</sup> >> Application: Marketing Cloud (update)
  - Email Preferences & Business Units
  - Journey Builder, Dynamic Content or Automation Studio
  - Enable Einstein
  - Re-Subscribe Contacts
- [Wiki Index](#) <sup>[21]</sup>
  - [Subscriptions](#) <sup>[22]</sup>
- [Wiki Category: Campus User Groups](#) (new) <sup>[23]</sup>
  - [UCCS | Lunch and Learn: eComm Handouts](#) <sup>[24]</sup>
  - [CU Anschutz | Lunch and Learn: Email Design Tips and Tricks](#) <sup>[3]</sup>

## Ongoing Data Monitoring

- [Data Issues Dashboard](#) <sup>[25]</sup>

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[4] [https://www.cu.edu/system/files/pages/323899-](https://www.cu.edu/system/files/pages/323899-UCCS%20%7C%20Lunch%20and%20Learn%3A%20eComm%20Handouts/docs/Building_Marketing_Cloud_Email)

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[5] [https://www.cu.edu/system/files/pages/323899-](https://www.cu.edu/system/files/pages/323899-UCCS%20%7C%20Lunch%20and%20Learn%3A%20eComm%20Handouts/docs/Building_Cvent_Event.pdf)

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[6] [https://www.cu.edu/system/files/pages/323899-](https://www.cu.edu/system/files/pages/323899-UCCS%20%7C%20Lunch%20and%20Learn%3A%20eComm%20Handouts/docs/Event_Planning_Checklist.pdf)

[UCCS%20%7C%20Lunch%20and%20Learn%3A%20eComm%20Handouts/docs/Event\\_Planning\\_Checklist.pdf](https://www.cu.edu/system/files/pages/323899-UCCS%20%7C%20Lunch%20and%20Learn%3A%20eComm%20Handouts/docs/Event_Planning_Checklist.pdf)

[7] <https://www.cu.edu/blog/ecommerce-wiki/manage-campaign-members> [8] <mailto:melanie.jones@cu.edu>

[9] [https://docs.google.com/forms/d/e/1FAIpQLSdzNq7t8on6\\_Bt9VQgq-](https://docs.google.com/forms/d/e/1FAIpQLSdzNq7t8on6_Bt9VQgq-7VPZ13Orbh4KdDLzXf0HCsktIEw/viewform)

[7VPZ13Orbh4KdDLzXf0HCsktIEw/viewform](https://docs.google.com/forms/d/e/1FAIpQLSdzNq7t8on6_Bt9VQgq-7VPZ13Orbh4KdDLzXf0HCsktIEw/viewform) [10] [https://www.cu.edu/blog/ecommerce-wiki/monthly-license-](https://www.cu.edu/blog/ecommerce-wiki/monthly-license-change-requests)

[change-requests](https://www.cu.edu/blog/ecommerce-wiki/monthly-license-change-requests)

[11]

<https://view.communications.cu.edu/?qs=1584a6a7e552077e7d4e83c85e55e2309688d0c302c3a7bb005cb3128e3b>

[12] <https://www.cu.edu/blog/ecommerce-wiki/marketing-cloud-datorama-overview>

[13] <https://www.cu.edu/blog/ecommerce/wiki/marketing-cloud-einstein-overview>  
[14] <https://www.cu.edu/ecommerce/submit-help-ticket> [15] <https://www.cu.edu/blog/ecommerce/wiki/understanding-email-journeys> [16] <https://www.cu.edu/blog/ecommerce/wiki/dynamic-content>  
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