POI (Person of Interest) Data in Salesforce [1]

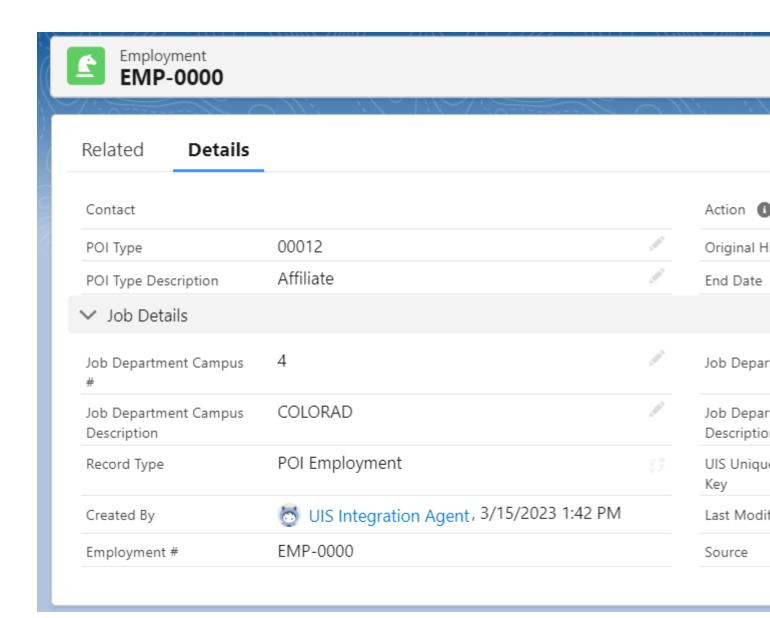
March 29, 2023 by Melanie Jones [2]

Person of Interest or POI data is used for Contacts with a non-traditional, close affiliation with CU. As of March 2023, POIs make up 32K+ Contacts.

Some POI Types include:

- Affiliates
- Security / Training
- Volunteer
 - Vol(unteer) Clinical
- Student Athlete
- Regent
 - FrmrRgnt (former Regent)
- and more

View <u>full details from Employee Services regarding POI Types across the campuses [3].</u> Checkout an example of a POI Employment record as it appears in Salesforce below.



Timeline & Impact

Timeline

POI data will be vailable when eComm specialists have the capacity for this change. We will time this project with others, including:

- GeoCode Sunsetting (May 1) [4] | COMPLETE
- Business Unit & Preference Optimization (June 1) [5] | IN PROGRESS (Oct. 2023)
 - eComm specialists will take the lead on Report / Data Extension updates and cleanup due to Email Preference Changes (scheduled to take place in May-October).

Impact

When this new POI data becomes available in Salesforce, Reports based on Employment data will need to be modified accordingly to capture POIs or not (depending on your use-

case). Failure to update a Report could result in a message going to a much broader audience (including POIs) by accident. While not as risky, failure to update Reports could also result in a missed opportunity of not communicating with POIs when you want to.

- Affected Reports include Reports based on Employment data, where the most granular filter includes Campus or Department. Employment Reports based on more specific criteria such as Campaigns, Job Group Codes, Titles, etc. will not be impacted.
- These nuances make identifying which Reports need to be updated difficult. **We know it** will be less than 1,500 Reports to edit.

Change Process | Identify Reports to Update

- 1. Determine Reports using Employment Record | System
 - Minus those that are more specific
- 2. Identify which Reports should include POIs and which should not | eComm specialists
- 3. Update Reports | TO BE DETERMINED
 - The system team is happy to help update Reports per eComm specialist direction.

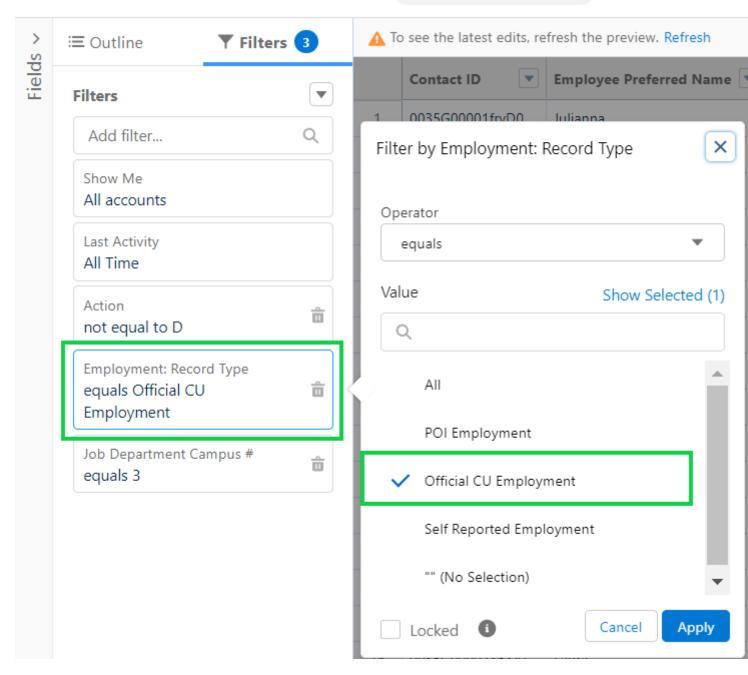
POIs will automatically be included in Reports. Although unnecessary, you could achieve the same goal with the following logic:

Add a Filter for: Employment: Record Type = POI Employment, Official CU Employment

Want to exclude POIs?

Add a Filter for: Employment: Record Type = Official CU Employment

Contacts with Employment



IMPORTANT Using Employment data to create an Automation in Marketin Cloud? Be sure to include a Filter for: Employment: Record Type = Official CU Employment. Failure to do so will result in POI's getting included in the audience.

Display Title:

POI (Person of Interest) Data in Salesforce

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No

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