Feb. 25, 2015
Who’s here?

PROJECT LEADS
• Ken McConnellogue
• Kim Egan
• Nalini Kaplan
• Jason Hunter
• Virginia Berkenkotter, ACF
• Alanna Steffens, ACF
• Susan Tobes, ACF

CAMPUS ECOMM MANAGERS
• Melanie Jones, System
• Megan Gallegos, UCCS
• Steve Tapp, CU Denver|AMC
• Matt Roush, Advancement
• Tom Needy, CU-Boulder
• Rachel Vaccheriello, CU-Boulder
• Erin Frazier, CU-Boulder

www.cu.edu/ecomm
What is eComm?

eComm is a systemwide initiative that provides University of Colorado schools, colleges, departments and units with a unified solution for electronic communication with alumni, donors, parents, and students, faculty and staff.

It was initiated by CU’s President Bruce Benson in 2009 to ensure a consistent approach to communications and branding compliance; achieve efficiencies of scale and address issues of data accuracy and currency.

www.cu.edu/ecomm
eComm | By the numbers

### # Records
- 35,000 employees (faculty & staff)
- 55,000 students
- 457,000 alumni
- 348,000 donors
- 450,000 w/ emails

### eComm in 2014
- 300 eComm users

#### EMAIL MARKETING
- 3,200 messages sent (10,000)
- 22 million inboxes hit (59 million)

#### EVENT REGISTRATION
- 400 events (700)
- $70,000 in revenue ($2 million)
- 5,000 attendees (20,000)

1 million records

www.cu.edu/ecomm
eComm | Suite of tools

- Alumni Online Community
- Email Marketing
- Form Builder

www.cu.edu/ecomm
eComm | Challenges

1. Data
2. Harris Connect
eComm | *What needs to be done*

1. Replace Harris Connect
2. Implement a CRM
3. Leverage shared data, technology, staffing and resources
4. Be strategic
5. Assess staffing/resource needs
6. Establish amazing support
eComm | Our sub-contractors

- Project Management
- Client POC
- Sub-contractor POC

ACF Solutions
Absolute Client Focus

- ExactTarget
- roundCorner
- ACF Solutions
- salesforce

www.cu.edu/ecomm
# eComm Support

## People
- President, Chancellor, VPs and other A-level leadership support
- Campus specialists
- Project Manager

## Resources
- Website - [www.cu.edu/ecomm](http://www.cu.edu/ecomm)
  - Quick Reference Guides
  - Short videos
  - Detailed manuals
- Classroom training
- Full access to SF training
- Integrated with campus help desks

## Funding
- License and software cost-share
- President funding development
eComm | Internal Communications

- Unique place in CAN-SPAM compliance
- Integrating the bulk mail tools into one, comprehensive system
- Carefully integrated with the IT environment at individual campuses
- Multi-campus affiliation recognized
- Student, faculty and staff journey is greatly enhanced when a comprehensive snapshot of communications is part of the constituent record
**eComm** | *What about Harris stuff?*

**MIGRATING**

- Data that is tied to records
- Email Preference data
- Community display preferences

**NOT MIGRATING**

- Email Marketing activity
- Event Registration activity
- Queries
- Reports

---

HARRIS ARCHIVE PROJECT (HAP)

[www.cu.edu/ecom](http://www.cu.edu/ecom)
eComm | Critical considerations

- Integrating with CU’s source systems, including Advance
- Aggregating A LOT of data
- Building a foundation
- Cross campus & department collaboration
- Fall activities
- Harris sunsetting
That's a lot of work and features, but…

WIIFM?
CU Connected | Where we’re headed

Putting the constituent in the center

www.cu.edu/ecomm

University of Colorado
CU Connected | ONE Single Systemwide CRM

**ONE** CRM that supports custom applications, like eComm.

**ONE** CRM that shares data with CU’s Systems of Record.

**ONE** CRM Community that leads, shares and exceeds.

www.cu.edu/ecomm
CU Connected | Shared across constituents, across campuses

The Connected Campus

Parents
Prospect

Faculty
Student

Staff

Employers

Donors
Alumni

The Connected Campus

Marketing
- Campaign Plan & Budget
- Marketing Automation
- Online Ad
- Social Listening/Interaction
- Content Mgmt
- Segmentation
- Predictive Analytics

Community Engagement
- Online Self-Service
- Student Service / Social Cust. Service
- Call Center
- Knowledge Base
- Calendar/Events Mgmt
- Volunteer/Mentor/Fan Mgmt
- Forms/Surveys

Recruitment
- Recruiter Territory Mgmt, Visits and Fairs
- Lead Acquisition & Scoring
- Test Score Integration
- Application & Third-Party App Integration
- Admission
- Document Mgmt
- Admission Decision Mgmt
- Commitment / Deposit Mgmt
- Orientation & Yield Activities

Student Success
- Financial Aid
- Notifications/Appeals
- Advising
- Course Catalog & Registration Information
- One Stop Shop/Self-Service

Advancement
- Capital Campaign Mgmt
- Major Gift & Planned Giving
- Annual Fund/Faculty-Staff Campaign
- Corporate & Foundation Relations
- Prospect Wealth Profile
- Alumni and Advisory Boards
- Reunions and Trips

Platform

Meal Plans
GL
Degree Audit
LMS
SIS
HMS
Fin. Aid System
HCM
Payroll
CU eCRM Center of Excellence

CRM Executive Committee

CRM Center of Excellence

Strategy, Delivery & Service Ops

SFDC Architecture Group
Data Management, Modeling, Platform Support, Administration, Contract, Licenses, Add-on, Integrations, BI, Security, Authn/Provisioning, Network, UI/UX

Business Process and Policy

App Security
UI/UX
Reporting
App Development
Project Mgmt
Testing
User Adoption
User Support
App Administration
Data Integration

New CU Initiative / Organization
Solution / Delivery Team
Advising
eComm
Solution 3
Solution 4
Solution n

www.cu.edu/ecomm
eComm & eCRM

Q & A

www.cu.edu/ecomm
eComm | Wanna know more?

Visit www.cu.edu/ecomm

Contact your campus eComm specialist

Send question about CRM to Nalini at Nalini.Kaplan@Colorado.EDU