Project Status, Oct 16 [1]

October 20, 2015 by Kim Egan [2]

We are seeing the light at the end of the tunnel. We are currently moving into production for phase 1, phase 2 has started and we're on target for MEC access in mid-November. Exciting!

We have also crossed a major milestone with eComm Salesforce security because the eComm team and the COE are in agreement on an interim model. While the current approach isn't perfect or longterm, it does allow us to effectively sunset Harris. The team will continue to explore long term solutions and we hope to have a plan in place to share with users early next year.

Now that we have a security model in place, the eComm team can begin assigning profiles and other access to users. We plan to have assignments to hand over to the COE for provisioning by the end of October.

We have started agressive conversations around this notion of email and ID lists that basically addresses how to handle data that is not resident in Salesforce/imported from a CU source system. An example of an email list might be Chamber of Commerce presidents in Colorado. Those individuals may not have a record in Salesforce because they are not an employee, student, alumni or donor. An example of an ID list might be a list of donors who gave to CU in 2015 to the Cancer Survivors fund. That specific fundraising data is not in Salesforce, but the individuals are so there needs to be a matching process with Advance ID numbers to create a Saleforce report. We are all in agreement that ensuring the ability to match against source system IDs is a critical requirement for eComm launch. Addressing how to handle email lists has data management, process and CAN-SPAM implications and requires more time to solution than our agressive timeline allows. COE (Nalini Kaplan), UIS (Jason Armbruster) and IDM (Miah Adams) are taking the lead on identifying solutions.

Another requirement that has recently risen to the top is around geolocation functionality, which allows our communicators to identify a geographic area and pull contacts without having to input a series of zipcodes. The COE is investigating a technology to add to the eComm suite to address this requirement and we are hopeful that it will be part of our initial rollout.

Phase 2 has officially started and the COE and our outsourced implementation partner, Vertiba, are working hard to implement the eComm event and membership management functionality using Cvent - the solution that will be used to meet these needs. We have signed

off on the configuration workbook and will be testing iterative packages of work in the coming weeks, again with the goal of this being part of our mid-November roll out to the MECs.

Come November, the MECs will be testing and building - all to ensure (as best as we can) that the eComm solution is fully ready for eComm users. ACF Solutions, our phase 1 implementation partner will come back to CO at that time to provide additional training to the MEC team and knowledge transfer to the COE. Vertiba will also be training the MECs on the use and management of Cvent.

We are also starting to discuss eCommference, which is the all-user training that is currently slated to happen in January or early February. We plan to send a series of emails out to users announcing the training event soon.

View the Project Management Update, 10/2 [3]

View the Project Management Update, 10/16 [4]

eComm_eCRM-status-update_20151016.pdf [5]

eComm_eCRM-status-update_20151002.pdf [6]

Display Title:
Project Status, Oct 16
Send email when Published:
No

Source URL:https://www.cu.edu/blog/ecomm-blog/project-status-oct-16

Links
[1] https://www.cu.edu/blog/ecomm-blog/project-status-oct-16 [2] https://www.cu.edu/blog/ecomm-blog/author/74 [3] https://www.cu.edu/sites/default/files/pages/75597-Project%20Status%2C%20Oct%2016/docs/eComm_eCRM-status-update_20151002.pdf
[4] https://www.cu.edu/sites/default/files/pages/75597-Project%20Status%2C%20Oct%2016/docs/eComm_eCRM-status-update_20151016.pdf
[5] https://www.cu.edu/doc/ecommecrm-status-update20151016.pdf?download=true
[6] https://www.cu.edu/doc/ecommecrm-status-update20151002.pdf?download=true