

## **Project Status, Oct 23** <sup>[1]</sup>



November 22, 2015 by [Kim Egan](#) <sup>[2]</sup>

UIS started data loads into the Production environment, which is slated to take about three weeks. Our first load in August and September took more than a month and the second lasted a little over three weeks, which is where our estimate comes from. While data loads, testing and building is taking place in the Stage environment and other activities are kicking off to prepare for all-user training in January.

The [eComm team \(MECs\)](#) <sup>[3]</sup> have built out folders in Salesforce for each unit that will need email lists. The team spent time reaching an agreement on the naming convention when new folders are created. While this seems straightforward, it's important as we enter into a world that is not just eComm - these folders will be amongst other folders that may be for Advising and new initiatives down the road. There are character count restrictions as well as Marketing Cloud considerations. We were very deliberate in our naming to ensure eComm folders stay together, are grouped in a hierarchical fashion and easily identified and found. For example, CU-Boulder's Leeds School of Business' folder will be named like this: "EC01\_Business" EC=eComm, 01=Boulder and Business=Leeds School of Business.

The next step is for the MECs to develop reports to load into each folder for our users' to associate with email campaigns. We are slated to complete the development of email lists by November 6.

The MECs have started re-testing the phase 1 solution (data and email marketing). While User Acceptance Testing (UAT) was conducted in June, only sample data was available and our new security model was not reflected. This activity is time consuming, but critical and is due in early November.

A third party vendor (NimbleJack) that was contracted by MarketingCloud and managed by ACF Solutions, is wrapping up work for our email preferences. This is a critical requirement that allows our constituents to opt in/out of emails in a usable way, but also ensures that CU stays compliant with federal CAN-SPAM laws. Their work is slated to wrap up next week. However, they are doing such a great job that we are investigating the feasibility of them doing additional work, which would lessen the workload for our MECs.

The alumni community is being revisited so we can close out the project. There are final assets like images and links that need to be added and UAT needs to be completed. A sub-committee has been established. Melanie Jones, Nonie Wainwright, Tom Needy and Melissa Cech are spearheading this effort.

Erin Frazier is continuing her work on the SkilSoft courses that users will be required to complete before they are granted access to Salesforce. FERPA, HIPAA and data security courses are already available and users can start taking these courses now. Accessibility and eComm Salesforce fundamental courses need to be created. We established a sub-committee that Erin is leading. Me and Megan Gallegos will be helping with the efforts and kicking into high gear to create these courses alongside the Skilsoft team. Erin has also engaged Dan Jones for support on the data security and accessibility courses.

eCommference training is just around the corner. Nonie and Melanie are breaking off to plan for this large-scale event in January, which include logistics such as venue, food, trainers and other support.

We have created a new user process that outlines each step required to get a new user into eComm Salesforce. The eCRM executive team reviewed this process yesterday during their regular meeting.

Next week, the COE will introduce the MECs to Cvent for event and membership management. The following week, Nov 2 - 6, will kickoff the first of two iterations of Cvent testing. We will have a week to test this first package and submit results.

I am working on communications that we will send out in the next week to users and stakeholders.

We've started working with our friends in the Controller's office on the development of an eComm video. I reached out to them because they recently launched a video about the new My CU Resources portal. Check it out at <https://youtu.be/EndI7zer4eQ> [4]. It will replace our existing video (see it here: [https://youtu.be/B\\_TrGfsSnDI](https://youtu.be/B_TrGfsSnDI) [5]). The new eComm video will provide a high level overview of eComm, such as it's tool suite, how to access, data integrations, other benefits and how it fits into the broader eCRM ecosystem. More to come on this great project.

View the Project Management Update, 10/23 [6]



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