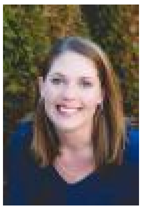
Project Status, Sept 4 [1]



September 9, 2015 by Kim Egan [2]

eComm project status update for the week of Aug 31 - Sept 4.

Last Monday on Aug 31, Kyle Kirves our Project Manager and Kalman Sweetwine our Sr. Business Analyst came to Denver for a formal phase 2 kickoff with the eComm team. Kyle gave a great presentation to help us understand the timeline and associated processes. We're very excited that Kalman will serve as our fully dedicated analyst. He comes to us with more than five years building solutions on Salesforce and is a Salesforce Certified Administration and Salesforce Certified Sales Cloud Consultant. Phase 2, which includes events and membership management, as well as surveys and generic forms will merge with phase one's timeline. The idea is that we will launch both phase 1 (Salesforce with LOTS of data and email marketing) and phase 2 (forms) together in January.

Nalini Kaplan from the CoE presented Salesforce security to the eComm team on Monday. We barely scratched the surface with only 30 minutes allotted for this topic. We plan to continue the conversation with and also hold a broader meeting that involves key stakeholders (like you!).

Lisa Carr, from UIS who is our data integration lead, has been working through addressing the data validation items that we uncovered and that specifically relate to HRMS and Campus Solutions/SIS. We will re-validate when UIS reloads data again in the coming month. The validation in large part was successful in the sense that data is in fact going to the right fields in Salesforce. For example, first name data is going to the first name field in Salesforce. Hats off to a lot of people who made this possible. I can't wait for you all to see eComm data in Salesforce. Glorious data! It's really exciting.

However, the largest concern that we shared with the data team on Aug 20 was around a field called, "Affiliations with Scope." At a high level, this field indicates a constituent's affiliation; such as alumni, faculty, staff, etc. This is one of the most important fields for eComm as it will be heavily used for creating email lists and report generation for analytics. As well, all Salesforce users (eComm and others) will reference this field when viewing an individual contact to understand their unique connection to CU. The concern is that the values that are being sent are different for each campus and in some cases, we don't understand what they mean. Kyle has taken the lead with the campus Identity Management (IDM) representatives to capture data dictionaries, streamline the values and overall, solve this complicated, but highly important piece of the eComm puzzle.

ACF and another vendor, called NimbleJack, have been working hard on completing the development around our email preferences. They have designed and built a custom preference center, which is nearly identical to the one that is currently available on our Harris Connect online community. They've also been building "units" that will serve as an interim page between an email unsubscribe link and the systemwide preference center. For example, CU-Boulder Arts & Sciences is a unit. So, if A&S sends an email and someone clicks the unsubscribe link, they will be first taken to the CU-Boulder A&S unit where they can opt-in or out of A&S-related emails. From there, they can link through to the systemwide preference center. With more than 200 categories, this has been a huge undertaking. Nimblejack has been testing the unsubscribe functionality between Marketing Cloud and Salesforce. Our last step with NimbleJack involves training on how to add and delete email preference categories - hoping to do this in a few weeks.

In terms of timeline, we are still shooting for an early January launch with access for the eComm team in November. Kyle's status update provides a great timeline for your reference.

View the Project Management Update [3]

Send your questions to contact@cu.edu [4].

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