

## **eComm Specialist Digest | January 9, 2023** <sup>[1]</sup>

January 9, 2023 by Melanie Jones <sup>[2]</sup>

### **General Updates**

- **Digest Changes** | Beginning in 2023, the eComm Specialist Digest (formerly the MEC Weekly Digest) will be delivered on a bi-monthly cadence in alignment with the CRM team's sprint planning.
- **Preference Changes | We did not receive any preference or business unit requests for Q1 of 2023.** While we will continue to accept requests for preference or Business Unit changes beginning in Q2, we ask that you only submit business critical requests and hold off on those that are 'nice to have' given the ongoing review and potential changes to the current model.
- **REMINDER: Submit Help Tickets** <sup>[3]</sup> | Please do not forget to submit a ticket for any requests, troubleshooting help, and general questions (even those escalated from a user via email). This is to ensure:
  - Issue distribution to the correct team member for the fastest resolution
  - Easy, ongoing analysis of support needs to advocate for future resources.
- **REMINDER: Cvent Approval Checklist** <sup>[4]</sup> | We are still seeing some events launched with incorrect information.
  - Paid & Fundraising Events | Always use the full checklist.
    - Event Names with Special Characters <sup>[5]</sup> | Do not approve events with a special character in the event name, as doing so will lead to payment processing issues.
  - ???????Free Events | Take five min. to review the eight essentials if you don't have time for the full checklist.

### **Action Items**

- **Jan. 26, 2-3 PM** | Quarterly MEC Meeting
- **By Jan. 31** | Review eComm User Fee Estimate for FY24: Campus teams received an announcement on Dec. 7 estimating the FY24 eComm user fee. In order for the team to continue finalizing the data, please assess your campus' ongoing license needs and report back to Jen Mortensen by Jan. 31. We request that you provide estimates for both growth in and reduction of your campus license volume.

### **Roadmap Updates**

#### **DATA**

- **Bounced Email Addresses:** The CRM team completed the first of a streamlined clean-

up of bounced email addresses. Going forward, we will complete bounced email address management on a monthly basis. This effort will involve:

- Wiping the bad data from the appropriate source system
- Updating the subscriber table to ensure that subscribers will be active to receive communications if and when a new email address is added to Salesforce
- Removing subscribers without email addresses in Salesforce from the subscriber table for storage management purposes
- **IER Storage and Big Objects:** Daniella Torres is exploring Salesforce big objects <sup>[6]</sup> as a storage alternative for IERs.
- **POI Integration:** Daniella Torres is continuing to work with the UIS integration team on capturing POI data in Salesforce.

## LICENSES

- **eComm User Fee:** Jen Mortensen announced our FY24 eComm user fee estimates in Dec. The estimates are based on several cost-saving measures that will be discussed at our first quarterly meeting of CY23 (Jan. 26, 2-3 PM).
- **Salesforce-Only License Level:** Jen Mortensen has calculated a Salesforce-only license level that will be launched in FY24.

## MAINTENANCE

- **Contacts without Email Addresses:** Jen Mortensen and Daniella Torres are exploring opportunities to reduce storage costs related to contacts without email addresses.
- **Business Unit Management:** The team is currently conducting a full assessment of eComm business units and identifying opportunities for an improved structure. We'll have an update for the campuses at our first quarterly meeting of CY23 (Jan. 26, 2-3 PM).
- **Email Preferences:** Daniella Torres and Claire Hamilton identified 70+ preferences that are missing from Marketing Cloud subscription pages and that are resulting in CAN-SPAM violations. They will be working to correct these errors during the current sprint.

## NEW FUNCTIONALITY

- **Distributed Marketing:** Distributed Marketing has been deployed in our stage environment and five licenses are currently being acquired to continue exploring the solution. We'll have more information about a rollout plan at our first quarterly meeting of CY23 (Jan. 26, 2-3 PM).
- **Email Preferences:** Claire Hamilton has been researching preference center options and is finalizing options for the team to consider. We'll have more information about strategy and proposed models in the new year.
- **Event Management:** Jen Mortensen and a small team of MECs have been reviewing several event management vendors to potentially support our free events after July 1. The team is currently assessing options and will have opportunities for MEC review in February.

## Ongoing Opportunities

- **Einstein:** If you'd like to have Einstein enabled in a specific business unit, add details to the Request Einstein spreadsheet by submitting a help ticket <sup>[3]</sup> and selecting "Marketing

Cloud >> Einstein" (no need to actually submit the ticket).

- **Journey Builder** [7]: Learn about using Journey Builder by submitting a help ticket [3] and selecting "Marketing Cloud >> Journey Builder, Dynamic Content or Automation Studio" (no need to actually submit the ticket).
- **Dynamic Content** [8]: If you'd like to work with Melanie Jones on a Dynamic Content use case, add details to the Dynamic Content spreadsheet by submitting a help ticket [3] and selecting "Marketing Cloud >> Journey Builder, Dynamic Content or Automation Studio".
- **Cvent Super User Enablement**: Five users responded to the opportunity to become a Cvent Super User in Nov. We are continuing to monitor their success and will expand the group in Feb. based on any lessons learned. Super Users can do the following without an eComm specialist:
  - Approve & Launch Free Events
  - Publish Reports to Portal and add Portal Users
  - Add Event Planner Email Addresses

## New/Updated Resources

- HIPAA/Med-Only Contacts [9]
- Managing Campaign Members for Users (including adding new Contacts) [10]
- eComm Leadership [11] (new: Kelly Miller from CU Anschutz and Lissa Cordova from CU Boulder)

## Ongoing Data Monitoring

- Data Issues Dashboard [12]

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