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eComm Specialist Digest | October 21, 2023 [1]

November 21, 2023 by Melanie Jones [2]

True or False Cvent, particularly eComm's instance, can be easily integrated with any number of tools (including Zoom) at any point.

General Updates

- **Previous Nov. eComm Specialist Meeting**: Monica Cutler from CU Denver present how Cvent's technology enhances the day-of-event processes to ultimately make for a better attendee experience.
    - Watch Recording [3]
    - Presentation [4]
    - Sample Survey [5]
- **Early Provisioning:** Provisioning/deprovisioning requests must be submitted (along with required pre-access requirements) by EOD Thursday, Nov. 29 (rather than Nov. 30). Credentials will be released to new users on Monday, Dec. 4.
- **Upcoming Dec. 7 eComm Specialist Meeting:** Rather than a presentation from a campus partner, Jen Mortensen will review eComm's recent work and continued roadmap to ensure alignment in the coming year.
- **Pre-Access Requirement Update:** Effective Oct. 2, all faculty, staff, and student employees must complete the Information Security Awareness Skillsoft training course every two years instead of every three. This course is an eComm pre-access requirement. The eComm Team is updating relevant resources along with the license object in Salesforce.
    - Please be mindful of this new requirement when communicating and collecting completed SkillSoft course screenshots for new provisioning requests.
    - The System Team is conducting the annual Pre-Access Requirement Audit. Given the above change, we expect a significant number of users will need to take action. We will manage this audit and keep eComm Specialists updated via Chatter. We may require assistance from eComm Specialists if their users do not take action before the deadline (or they will be deprovisioned).
        - **Nov. 16 |** First Email Sent
        - **Dec. 7 |** Reminder Sent with MEC CC-d
        - **Dec. 15 |** Complete (or get deprovisioned)
- **eComm specialist sessions:** Thanks to all those who have participated. Each recording is/will be posted to the wiki along with a short embedded quiz and a linked extended quiz (30 - 60 min).
    - Campaigns, Campaign Members & Apsona
        - cleanup list (new!)
    - Reports
    - Data Extensions | Dec. 29, 9:30 - 10 AM

- **Q1 Preference Changes:** We are now accepting email preference requests to be completed in Q1 of CY24. Please review this *recently revised* wiki and submit your requests on the Q1 tab of the Email Preference Requests spreadsheet by December 4.
    - All requests will be reviewed by the System eComm Team before implementation to ensure they align with the new simplified preference model.
    - See the NEW Process Timeline tab in the wiki for a rough timeline of the request through the completion of the work process.
- **User Sessions:** Marketing Cloud users (within eComm and other instances) will be invited to a series of 30-minute. sessions reviewing best practices.
    - Text Block Tips | **Nov. 28, 2 PM**
    - Image Best Practices | **Dec. 13, 3 PM**
    - Accessibility | **Dec. 15, 10 AM**
    - Designing for Mobile | **Dec. 19, 11 AM**

Roadmap Updates

DATA

- **Person of Interest (POI) Integration |** POI data [6] is available in Salesforce to Admins only. Prior to new data being available in production to all users, we will provide clarity on the impacts to existing reports, how to modify reports based on your needs, and more. POI data will become available once prioritized by the eComm specialists, which entails reviewing/updating 1,400+ reports.
- **Dual Employees |** Due to some housekeeping changes in Human Capital Management (HCM), the former "campus 6" indicator is no longer available, meaning we can no longer query for "dual campus" employees in our Salesforce reports as done previously.
    - The solution is to use a series of job department IDs (109 in total) as filters in the report [7] to approximate what was previously represented by "campus 6". Unfortunately, this will encompass a broader range than the previous "campus 6" solution — about 2,500 central admin employees at CU Anschutz and CU Denver — compared to approximately 1,000 individuals previously.
- **CU Ascend Integrations with Salesforce |** The following items are due to changes within CU Ascend (formerly Advance). Until resolved, eComm specialists will need to get this data from CU Ascend or their user and import it to Salesforce via a Campaign [8] and/or import a CSV file to a Data Extension [9].
    - **Interest/Scholarship/Affiliation Data |** CU Ascend is no longer populating certain data in eComm's Salesforce environment. Both teams are working together to understand the full scope of missing data and identify a timeline to repopulate it. This will be discussed at our Nov. 2 meeting.
    - **Missing Advance ID and Primary Email |** A group of employees are missing Advance ID and thus missing primary email addresses in Salesforce. The Faculty/Staff load from the HR System to Ascend has been delayed along with other loads such as graduate, new student, parent, and patient data loads. The most recent faculty/staff load took place in early May before the transition to Ascend. Advancement hasn't been given an ETA for the HR integration to resume, although they are actively working on a solution to these integration issues.

MAINTENANCE

- **Reminder |** When creating a new Data Extension in a Business Unit that is shared among multiple groups, use the correct naming convention (group abbreviation) and put the Data Extension in the correct folder in the Business Unit

[10].

Ongoing Opportunities

- Request the following items by submitting a help ticket [11] and selecting "Marketing Cloud >> select topic below >> follow instructions".
    - Einstein [12]
    - Journey Builder [13]
        - With every commencement, CU Denver invites the graduating class to contribute to a fund of their choosing. A journey promoting this opportunity to Spring 2023 graduates is launching at the end of March.
          A Birthday Journey Email for CU Anschutz is underway, pending content (similar to the one launched by UCCS for alumni).
    - Dynamic Content [14]

New/Updated Resources

- Cvent Add-Ons for Purchase [15] (updated process)
    - Submit a help ticket [11] for increased access after the contract is signed: Cvent >> Add-Ons for Purchase
- Cvent Integrations [16] (callout Zoom integrations as not possible)
- Salesforce Campaigns [17] (updated with tips for 'cleaning' a list for Apsona, a short quiz embedded and full 30-60 min quiz linked)
- Salesforce Reporting [17] (updated with short quiz embedded and full 30-60 min quiz linked)
- Playable [18] (video added)
- CU Photography [19] (updated links)
- Save Existing Email as Template [20] (screenshots added to wiki)

Ongoing Data Monitoring

- Data Issues Dashboard [21]
- Standard Contacts Created [22]
- eComm Licenses [23]
- Marketing Cloud User Engagement [24]
- Cvent User Engagement [25]

Answer: False While new integrations are technically possible in Cvent, they are currently not supported for two main reasons. Learn more about eComm's approach to information security and providing CU-wide benefit [16].

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