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Understanding Preferred Name at CU [1]



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Most communicators agree that email personalization leads to higher engagement rates among constituents. But what happens when preferred name personalization goes awry and we end up alienating the exact audience with whom we want to engage? Despite our best efforts, incorrect email personalization can break relationships rather than build them. This wiki will help you understand how preferred name data is sourced at CU.

Personalizing email communication with preferred name is one of the most common ways in which communicators customize their messages. While the goal of personalizing with preferred name is a good one, it can quickly become problematic and unintentionally hurtful given eComm's current data model [3].

IMPORTANT If you are communicator hoping to personalize your email outreach with preferred name, there are key steps you must follow in order to personalize correctly. Please review the Personalizing your Email with Preferred Name or other Profile Attributes [4] wiki or contact your eComm specialist [5] for more information.

How does eComm source preferred name data?

Preferred name data in Salesforce populates from three CU source systems:

- **Students**: Campus Solutions (CS)
- **Employees**: Human Capital Management (HCM)
- **Alumni and Donors**: Advance/Ascend

The preferred names in these source systems sometimes vary, such as in this example:

A former student with the first name Bobby (in Campus Solutions) later becomes a CU employee and prefers to be called Robert (in HCM) in a professional setting. Since eComm's current data model only populates first name from Campus Solutions, emails personalized with first name will read as "Dear Bobby" rather than as "Dear Robert."

The use of an incorrect first name is particularly hurtful when it involves the use of a deadname [6] that was updated in one source system but ultimately not passed down to the first name field in Salesforce.

How can constituents update their preferred name data?

If a constituent reaches out regarding an incorrect preferred name, it can be corrected, but the way the correction occurs will depend on who the constituent is and what their relationship is with CU.

- **Students**: Currently enrolled students should update their preferred name in the student portal
- **Employees**: Current employees should update their preferred name in the employee portal
- **Alumni and donors**: Alumni, donors, and friends wanting to change their preferred name can do so either by updating their contact information [7] (also available as a link in the footer of all commercial emails) or by sending an email to contact@cu.edu [8].

Related Content

- Personalizing your Email with Preferred Name or other Profile Attributes [4]
- Preferred Name Rollout for eComm Specialists [9]

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