Published on *University of Colorado* (https://www.cu.edu)

Get Started [1]

February 13, 2023 by Melanie Jones [2]

After getting a sense of UCCS Admissions Connect offerings including three available student journeys [3], determine which is a good starting place for your needs. Fill-out a brief document and initiate a kick-off meeting.

Kick-Off Meeting

Kick-Off Meeting

Department + UIS

- Discuss content template
- Establish timeline
- Define audience segment / review CRM
- Content strategy/analysis
- What email template and content blocks will be used (email design)

Kicking off the initial Journey will be a group effort:

- Short-term, those with a request will need to identify individuals in their unit to get access and trained to manage prospective student data (required to launch the automation and track student engagement and enrollment as they move along the journey).
    - The Journey launch timeline will be dependent on those identified becoming familiar with their roles (among other things).
- Longer-term, those with additional Journey requests can take on more responsibility.

Training

Salesforce CRM / Marketing Cloud Enablement

Department + UIS

- Train department representative on CRM tool. WIKI
- Ensure all leads are being captured via Campaigns in Salesforce.
- Train department representative on how to track status and results of journey and send ad-hoc emails (when necessary) in Marketing Cloud. WIKI
- Email Marketing Best Practices (including advance features) [4]

Build Journey & Test

Implementation

UIS

- Build email series
- Add personalization features and/or dynamic content
- Configure journey

Testing

UIS

- Test with data in Salesforce
- Ensure email is designed correctly across all browsers and screen sizes
- Send email series to Department

Pre-Launch Meeting & Launch

Alignment Meeting

Department + UIS

- Meet to showcase implementation
- Walk through how journey will work
- Ensure all requirements are met

Launch

UIS

- Activate journey in Marketing Cloud

Monitor & Improve

Monitor and Tracking

Department

- Monitor journey to ensure it is working correctly
- Look at tracking results after journey has been live for a week/month

Analytics Document

UIS

- Provide department with Marketing Analytics report with results from journey activity

Display Title:
Get Started
Send email when Published:
No

Source URL:https://www.cu.edu/blog/uccs-ar/get-started

Links
[1] https://www.cu.edu/blog/uccs-ar/get-started [2] https://www.cu.edu/blog/uccs-ar/author/39
[3] https://www.cu.edu/blog/uccs-ar/uccs-admissions-connect-offerings-including-three-student-journeys
[4] https://www.cu.edu/blog/uccs-ar/email-journey-best-practices