

## **Discovery** <sup>[1]</sup>

Meet with eComm to review your communication and event goals and learn how we can best support your efforts. Potential users can expedite discovery by completing our [questionnaire](#) <sup>[2]</sup> beforehand.

**Interested in an eComm license?** [Request access](#) <sup>[3]</sup> to kick-off a discovery meeting.

### **CURRENT STEP | Discovery**

#### **Download** <sup>[2]</sup>

Interested in leveraging the eComm platform for your communications and/or events? Complete the discovery questionnaire below with your team before meeting with your eComm specialist for discovery. These questions, aimed at identifying key business needs, will ensure that your eComm specialist can best support your efforts.

Your eComm specialist will continue to be your primary point of contact, providing direct user support including office hours and user groups.

The discovery questions are listed below:

#### **About you...**

- What is your role?
- Who is on your team and what are their roles?
- What is your internal communications and/or event workflow like?
- Do you regularly partner with any other offices or departments?

#### **About your communications...**

- Are you currently sending communications? If so, what platform(s) are you using?
- How many communications do you send each month?
- What type of communications do you send?
- Who is your audience, generally?
  - Do laws outside of CAN-SPAM, FERPA, or other campus policies apply to this audience? For example, if your audience must be HIPAA-protected, eComm is likely not the right fit.
- Who develops and approves your content?
- What is your communication plan for the upcoming year?

- If you could change one thing about your current communication model, what would it be?

### About your events...

- Are you currently hosting events? If so, what platform(s) are you using?
- How many events do you host a year?
- What type of events do you host?
  - Are they free or paid?
  - What features do you need?
- Who are your attendees, generally?
- How many attendees are typically at your events?
- Are there any other event planners on your team?
- How do you market your events?

*Cvent: Paid and/or complex events are supported by Cvent.*

*eComm Event Management: Simple events without payment can be supported by eComm Event Management.*

### Additional comments...

Download <sup>[2]</sup>

**Good candidate for an eComm license?** Your eComm specialist will submit a request to get your license(s) started, which occurs on a monthly basis.

### Your next steps include:

1. completing pre-access requirements <sup>[4]</sup> | you must send a SkillSoft screenshot to your eComm specialist by the last business day of the month to receive credentials around the 5th of the following month
2. post-access training <sup>[5]</sup> | new users will be provided with training resources along with a quiz to complete

## NEXT STEPS | Pre-Access Requirements

Once your eComm specialist determines you're a good candidate for an eComm license, complete pre-access requirements.

NEXT <sup>[4]</sup>

### Groups audience:

eComm

**Source URL:** <https://www.cu.edu/ecommerce/access-training/discovery>

### Links

<sup>[1]</sup> <https://www.cu.edu/ecommerce/access-training/discovery>

[2] <https://www.cu.edu/doc/ecommm-discovery-questionnaire170927docx>

[3] <https://www.cu.edu/ecommm/request-access> [4] <https://www.cu.edu/ecommm/access-training/pre-access-requirements> [5] <https://www.cu.edu/ecommm/access-training/login-training-quiz>