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# eComm Upgrade 2019 [1]




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Every day, communicators throughout the CU System rely on the eComm program [5] to build and strengthen relationships with their constituents, including students, alumni, donors, faculty, and staff. An integral component of these efforts is ensuring that Salesforce, Marketing, Cloud and Cvent work in concert with one another and with minimal technical disruption, an effort jointly supported by the eComm team [6] in the Office of the President and the CRM Center of Excellence (COE) [3] housed on the Boulder campus.


- Summary
- UCCS & System
- Denver & Anschutz / Denver & Anschutz Advancement
- Boulder & Boulder Advancement
- FAQ
- The Team




## WHAT & WHY

When the eComm program as we know it today launched in 2016, the Salesforce environment that is the data backbone of communication efforts existed in the same technical space as student success CRM efforts on the Boulder campus. While this shared space allowed eComm to achieve its goals, continued program growth has presented challenges for both the eComm and student success teams. A few of these challenges include but are not limited to data integrity, integration between data source systems and Salesforce, overall platform stability given the volume of users and data housed, and visibility of data based on its relevance to the team being supported.



## WHEN

In fall 2018, the COE launched a project to address these and other issues: **eComm Upgrade** . This project will move eComm users, data, content, and functionality off of the current shared environment with Boulder student success to a new space that will be eComm-specific. The goal of the project is to ensure that eComm users have access to the data that they need to communicate effectively and that the data is accurate, timely, and usable in a powerful way to increase constituent engagement throughout the CU System.




## HOW

While the eComm upgrade is a technical change that will not result in disruptions or gaps in communication, eComm Specialists across CU will support project efforts by reviewing current audience reports for relevance and accuracy and by working with eComm's over 300 users to build and refine outreach strategies that will truly maximize the power of the eComm tools. eComm's new Salesforce environment will be completed and extensively tested by April 1, 2019. At that time, the COE will work with eComm Specialists to begin moving users from our current shared environment to the eComm-specific one.



# IMPACT

The change should be seamless - while some login information and processes will change, usability will not be affected, and users will be able to continue sending their communications as normal. The shift to the new environment will also be gradual. Rather than moving all eComm users at once, the COE will work with eComm Specialists to conduct a rolling migration of users based on planned communication and outreach efforts so that the impact of the technical change is minimal. The COE expects to begin migrating users in April 2019 with a completion goal of May 2019. For further questions about the impact, see the "FAQ" tab.

# UCCS AND CU SYSTEM MIGRATION

UCCS and CU System eComm users will migrate to the new org on April 29-30, 2019. A timeline for the migration is below.

## Required Training

Required training will be offered on the dates and times below. The migration will directly impact Salesforce and Marketing Cloud users, who are required to attend training. Although the migration will not directly impact Cvent-only users, they are encouraged to attend training to learn about enhanced Cvent-Salesforce integration launching with the eComm upgrade.

- Tuesday, April 23, 10:00 a.m. - 12:00 p.m., CU System (1800 Grant St.) | REGISTER [7]
- Wednesday, April 24, 10:00 a.m. - 11:00 a.m., Virtual | REGISTER [8]

- Friday, April 26, 10:00 a.m. - 12:00 p.m., UCCS | REGISTER [9]

Registration will be available beginning on Monday, April 15.

## Additional Resources

- Migration Impact [10]
- Key Changes [11]

## Timeline



# eComm Spe

## April 15

# CU DENVER, CU ANSCHUTZ, & CU DENVER AND ANSCHUTZ ADVANCEMENT MIGRATION

CU Denver and CU Anschutz Medical campus eComm users (as well as Advancement users on those campuses) will migrate to the new org on May 6-7, 2019. A timeline for the migration is below.

## Required Training

Required training will be offered on the dates and times below. The migration will directly impact Salesforce and Marketing Cloud users, who are required to attend training. Although the migration will not directly impact Cvent-only users, they are encouraged to attend training to learn about enhanced Cvent-Salesforce integration launching with the eComm upgrade.

- Wednesday, May 1, 10:00 a.m. - 12:00 p.m., CU Denver | REGISTER [12]
- Thursday, May 2, 10:00 a.m. - 12:00 p.m., CU Anschutz | REGISTER [13]
- Friday, May 3, 1:30 p.m. - 2:30 p.m., Virtual Training | REGISTER [14]

Registration will be available beginning on Monday, April 22.

## Additional Resources

- Migration Impact [10]
- Key Changes [11]

## Timeline



# eComm Spe

## April 22

# CU BOULDER & CU BOULDER ADVANCEMENT MIGRATION

CU Boulder and CU Boulder Advancement eComm users will migrate to the new org on May 13-14, 2019. A timeline for the migration is below.

## Training

Training will be offered on the dates and times below. The migration will directly impact Salesforce and Marketing Cloud users. Although the migration will not directly impact Cvent-only users, they are encouraged to attend training to learn about enhanced Cvent-Salesforce integration launching with the eComm upgrade.

- Friday, May 3, 1:30 p.m. - 2:30 p.m., Virtual | REGISTER [14]
- Monday, May 6, 2:00 p.m. - 3:00 p.m., Virtual | REGISTER [15]
- Tuesday, May 7, 9:00 a.m. - 11:00 a.m., In-Person Training at CU Boulder | REGISTER [16]
- Friday, May 10, 10:00 a.m. - 11:00 a.m., Virtual | REGISTER [17]

## Additional Resources

- Migration Impact [10]
- Key Changes [11]

## Timeline



# eComm Spe

## April 29

# FAQ

While we do our best to anticipate all of the questions you might ask, we recognize that we likely did not capture all of them. If you have a question or concern not addressed below, please reach out to us for assistance.

Jump to Marketing Cloud FAQ | Jump to Salesforce FAQ | Jump to Cvent FAQ

# General

## Why is eComm moving to a new Salesforce environment?

The goal of the eComm upgrade is to provide better service for eComm users and to create opportunities for continued program growth, adoption of best practices, and development of email strategies that are data-driven. Migrating eComm to a dedicated technical platform will provide better visibility, more streamlined permissions, and increased data integrity. With eComm separated from student success, the COE will be able to provide better support and faster turnaround time because there will no longer be interdependencies between eComm and Student Success in terms of data, permissions, and overall structure. eComm will also benefit by working with higher-quality data that will enable users to achieve their goals more effectively.

## What will be different?

eComm as we currently know it provides great value and stability, but moving eComm to a dedicated environment will make it possible to implement several program-specific enhancements while leaving plenty of room for growth. A few changes users might see but that do not affect the overall look and feel nor require additional training include the following:
- Enhanced Cvent integration
- Improved eComm-specific page layouts in Salesforce
- A hospital email field for CU Anschutz and an IdentiKey email field for CU Boulder
- A field-change history for eComm-defined fields in Salesforce
- Elimination of ability to view business contacts, which are not relevant to eComm users
- Enhanced training on report building and audience selection to achieve strategic goals
- Enhanced training on Salesforce campaigns

## What will stay the same?

The eComm platform components of Salesforce, Marketing Cloud, and Cvent will remain the same. The appearance of Salesforce will change slightly with a transition to Lightning [18] experience, but overall functionality and processes will not be affected. Integrations between Salesforce and data source system will not only remain intact but also be enhanced and documented so that problems can be addressed more quickly if and when they arise.

## What do I need to do as part of this process?

Your eComm Specialist will work with you throughout the eComm upgrade to do the following:
- Conduct a review of your current and future audience reporting needs so that old reports can be eliminated and the accuracy of current reports can be verified
- Conduct a review of your Marketing Cloud content to eliminate unnecessary items and prepare needed content for the transition to the new environment

# Marketing Cloud

## Will I need a new user name and password?

You will need a new user name and password for Marketing Cloud, but your login information for Salesforce and Cvent will remain the same. The CU System eComm team will provide new Marketing Cloud login information to you when your campus migrates to the new environment.

## Will there be a time period in which I am unable to send emails?

Downtime needed to move business units to the new environment will be minimal and will occur mostly outside business hours. We will provide information about any scheduled downtime or outages well in advance of them occurring. If downtime is planned, we will give users at least five business days notice to reschedule any affected communications.

## Will I be able to keep my Marketing Cloud content?

Yes. All of the Marketing Cloud content that you decide to keep, including emails, templates, images, shared content, and saved content, will transfer to the new org. In December 2018, we asked for your help to minimize the impact of the transition by conducting a Marketing Cloud "cleanup" and identifying and deleting content that you'll no longer need.

## Will I still be able to access my tracking data for email sends?

You will not be able to access your previous email send data in the new environment. Before you migrate, identify any send data that you need to keep for ongoing tracking or compliance reasons and work with your eComm Specialist to obtain it.

## Will my Journey Builder and Automation Studio content remain available?

All journeys and automation studio content for the appropriate business units have already been migrated.

## Will my data extensions still be available?

In December 2018, your eComm Specialist worked with you to assess the audiences with which you plan to communicate going forward. The eComm team will ensure that needed data extensions associated with your Salesforce audience reports are available when you login with your new Marketing Cloud credentials.

### What if I have email content in Classic Content and Content Builder?

Marketing Cloud is ending its support of Classic Content in 2019. Therefore, any content created in Classic that you identify as being needed in 2019 will be automatically converted to Content Builder as part of the transition process. The eComm team will provide more information soon.

### Will I still be able to use dynamic content and A/B testing?

Yes. Dynamic content and A/B testing will not be affected by the transition.

### Will Marketing Cloud look different?

No. Marketing Cloud's functionality and appearance will not be affected by the transition.

### Will my constituents' email preferences remain the same?

Yes. Email preferences for every constituent will be transferred to the new eComm environment.

### I don't use Marketing Cloud as much as I thought I would. Do I have any options to save money with this transition?

Yes. The COE is working closely with the eComm team on a "Simple Send" tool that would exist in Salesforce and that would rely on existing CU templates in Marketing Cloud to generate brand-specific emails in which you would still have control over the content. This means that if you're not sending very many emails and your emails aren't complex, you'd only need a Salesforce license rather than both a Salesforce and Marketing Cloud license. Your eComm Specialist will reach out with more information as soon as this functionality is available.

## Salesforce

### Will I need a new user name and password?

No. Your Salesforce user name and password will not change.

### My audience reports and campaigns are stored in Salesforce. Will I still be able to use them?

In December 2018, your eComm Specialist worked with you to assess the audiences with which you plan to communicate going forward. The eComm team will ensure that needed Salesforce audience reports are available when you login to the new environment.

### Will I still be able to email campus email fields?

Yes. You will still be able to email campus email fields for Boulder, Colorado Springs,

Anschutz, Denver, and System.

### Will my constituents' email preferences remain the same?

Yes. Email preferences for every constituent will be transferred to the new eComm environment.

### My eComm Specialist built dashboards for me. Will I still be able to access them?

No. However, your eComm Specialist can provide you with PDFs of dashboards and other relevant information since you began as an eComm user so you can track your progress. Similar dashboards can be created in the new environment so you can continue defining your email marketing strategy.

### Will Salesforce look different when I login?

Yes. The new eComm environment comes with the added bonus of allowing users to transition to Salesforce Lightning [18]. While the appearance of your screen will be different, the functionality will remain the same. Your eComm Specialist will be available to answer any questions about the new look and feel, and training will also be provided as part of each campus' migration.

### Will I ever be able to send email through Salesforce?

Yes. The COE is working closely with the eComm team on a "Simple Send" tool that would exist in Salesforce and that would rely on existing CU templates in Marketing Cloud to generate brand-specific emails in which you would still have control over the content. This means that if you're not sending very many emails and your emails aren't complex, you'd only need a Salesforce license rather than both a Salesforce and Marketing Cloud license. Your eComm Specialist will reach out with more information as soon as this functionality is available.

## Cvent

### Will I need a new user name and password?

No. Your Cvent user name and password will remain the same.

### Will my events and associated data still be available?

Yes. When you login to Cvent, all of your previous event data will be available.

### Will all of my images and content still be available?

Yes. Your images and content will be available after the transition.

### Will my eComm Specialist still be able to integrate my event with

### Salesforce?

Yes, your events will still be integrated with Salesforce so you can use RSVP exclusion reports, but this process will be automated. Neither you nor your eComm Specialist will need to perform a manual integration. We will have more information about this change available soon.

### Will Cvent look different when I login?

No. The look, feel, and functionality of Cvent will not be affected by this transition.

## PROJECT TEAM

Questions about the work taking place for the eComm upgrade? Please contact us [4] for assistance.



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## eComm Specialists

The above team also works closely in a collaborative partnership with 15 eComm Specialists [6] across the CU System to ensure that the eComm upgrade meets the needs of CU communicators.

**Attachments:**
CU Boulder Migration Timeline [19]
CU Denver & CU Anschutz Migration Timeline [20]
UCCS & System Migration Timeline [21]
**Groups audience:**
eComm

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**Source URL:**https://www.cu.edu/ecomm/strategy/ecomm-upgrade-2019

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