

Program Roadmap ^[1]

The eComm team actively works with campus partners to identify, prioritize and deliver on ongoing program improvements and enhancements. To enhance the partnership and acknowledge campus-specific goals and challenges, a new governance process is scheduled to launch in Jan. 2027 and will offer robust, repeatable evaluation processes that ensure transparency and equity in delivery of shared services.

Our current roadmap is below.

- FY27 In Progress
 - FY26 Completed
 - FY25 Completed
 - FY24 Completed
 - FY23 Completed
 - Awaiting Prioritization
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- **Handover Model Implementation** | CU Ascend Integration with Marketing Cloud
Assist with Advancement's integration of CU Ascend to Marketing Cloud and develop business processes that improve the constituent experience.
 - **Simple Send Build and Pilot** | Simple Send Solution for Basic Emails
Develop a simple send email solution for communicators who do not require full Marketing Cloud functionality.
 - **Journey Builder Training and Pilot** | Journey Builder Rollout to eComm Specialists
Train and enable eComm specialists on creation and management of simple journeys in Marketing Cloud.
 - **eComm Event Management Enhancement** | Enhance eComm Event Management Solution
Implement improvements to eComm Event Management based on user feedback.
 - **CU Boulder SAP** | Bulk Sender Compliance
Implement Boulder-specific SAP to allow for a custom domain while continuing compliance with bulk sender regulations.
 - **eComm Event Management** | Offer a Simple, Affordable Solution for Free Events
Build a Salesforce-based solution for free, simple events to expedite event creation and management processes and to reduce expenses associated with Cvent registrations.
 - **Email Preference Migration** | Simplify Email Preference Management Solution

Migrate current email preferences from Cloud Pages to Form Assembly.

- **Governance Structure Planning** | Obtain Campus Feedback and Work Toward Revisions to Governance Structure
Work with campuses to address program challenges through the development of a new governance group and associated processes.
- **Marketing Cloud Subscriber Table Maintenance** | Operational Management
Research and implement subscriber table management practices to improve operations at scale.
- **Multi-Org Enablement** | Enable Multi-Org Connector to Allow for Broad Use of a S
Enable the multi-org connector to allow for broader use of a single Marketing Cloud environment that can connect to multiple Salesforce implementations.
- **SSO for Marketing Cloud and Cvent** | Improve Security
Move to single sign on (SSO) for both Marketing Cloud and Cvent to comply with CU's security requirements.
- **2024 Bulk Sender Requirement Changes** | Keep inboxes safe and SPAM-free
Ensure that Marketing Cloud is technically configured to support delivery in compliance with new Gmail and Yahoo regulations.
- **Do Not Contact** | Integrate Do Not Contact field
Integrate the do not contact field from Advance/Ascend to Salesforce to reduce the need for manual data loads and increase the accuracy of data.
- **Email Opt-Out Field** | Create bidirectional integration for email opt-out data
Create a bidirectional integration for the global email opt-out field between Salesforce and Advance/Ascend to eliminate the need for manual data loads and increase accuracy.
- **eComm Specialist Education & Enablement** | Increase adoption of Marketing Cloud features for strategic marketers
Improve existing training and enablement opportunities and develop new opportunities for eComm specialists, super users, and the broader eComm user community.
- **POI Data** | Integrate POI Data
Integrate POI data with Salesforce to gain a more complete picture of this audience and will adjust audiences accordingly. This data is ready to be made available once the eComm specialists prioritize it and have the capacity to update nearly 1,500 impacted Reports.
- **User Continued Education & Enablement Sessions** | Increase user skills and overall program engagement
Offer ongoing training and enablement opportunities to increase user engagement.
- **Anschutz Super User Pilot** | Expand access to specific features and functionality
Launch super users for schools/colleges to create audiences and approve events in

alignment with Anschutz email and event policy.

- **Business Unit & Preference Optimization** | Share Business Units and consolidate Preferences
Implement a simplified Marketing Cloud business unit and preference model across the campuses to reduce costs, streamline the constituent experience, and decrease the level of backend management needed.
- **Event Management** | Identify cost-effective solutions
Gather requirements and work to identify a simple, cost-effective event management solution, particularly for users with simple, free events.
- **Selected Boulder Users Migrating to CRM01 & MC01** | Streamline engagement with CU Boulder student audience
Migrate selected senders engaging with student to a campus-specific implementation.?
- **Billing Fields** | Create new billing fields on the license
Create several new billing fields on the license object to streamline the billing process for all campuses, including those with a distributed funding model. New fields will also account for charges to multiple speedtypes.
- **Billing Process** | Launch new billing process in UIS
Launch a new billing process in UIS using the new billing fields that will increase accountability and transparency for all license charges. We will continue to accept feedback throughout the year and make incremental changes as needed.
- **Bounced Emails** | Streamline bounced email data flow
Identify a streamlined approach for the management of bounced and inactive email addresses, including identification and removal from Advance/Ascend. Additionally, determine the automated process to reactivate inactive subscribers in Marketing Cloud when a new email address is added to the contact record.
- **Cvent Licenses** | Purchase additional licenses
Purchase additional Cvent licenses to accommodate ongoing growth in the user base.
- **Cvent Integration** | Improve the CV-SF integration
Troubleshoot and correct previous integration issues and populate data that was not initially sent to Salesforce.
- **Cvent Payment Issues** | Improve financial reconciliation
Streamline speedtype and account code selection to reduce reconciliation time.
- **Data Extension Automation** | Reduce the need to import data extensions
Offer opportunities to automate data extension imports to increase audience accuracy and CAN-SPAM compliance.
- **Dynamic Content** | Allow for customized email content
Create opportunities for the broad use of dynamic content through the synchronization of Salesforce objects and will conduct training accordingly.

- **Einstein Enablement** | Enable Einstein for Marketing Cloud
Conduct an Einstein pilot in Marketing Cloud to assess overall business value, particularly in conjunction with journeys.
- **GeoCode Sunset** | Sunset the use of two fields in Salesforce
Sunset the use of GeoCode and GeoCode Description in anticipation of its source (Advance soon to be Ascend) sunsetting the field during migration (June 1 launch).
- **Intermediate Training** | Provide Cvent intermediate training
Create and provide intermediate training for Cvent users to increase enablement and reduce reliance on eComm specialists.
- **Multifactor Authentication** | We will enable MFA in Marketing Cloud
Enable multi-factor authentication for users.
- **New User Journey** | Increase the skillset of new users
Develop a journey for new eComm users that will continue their education post-onboarding and that will address more advanced topics, such as A/B testing, designing for mobile, and accessibility.
- **Opt-Out Audit** | Ensure accurate opt-out data for all preferences
Ensure that email opt out information is being processed correctly for both global and business unit email preferences.
- **Onboarding** | Customize onboarding outreach
Customize new user onboarding communications with Dynamic Content to streamline the new user process and reduce time spent on manual tasks.
- **Page Layout** | Improve page layout on Salesforce objects
Improve the page layout for all Salesforce objects including removal of unnecessary fields and reorganization of existing fields based on eComm business cases.
- **Preferences Audit** | Audit all preferences for accuracy
Conduct a complete audit of the existing email preference solution and determine inconsistencies, inaccuracies, and where corrections should occur.
- **Preferences Solution** | Explore new preferences solution
Gather requirements and begin exploring alternatives to our current email preferences solution, including the potential restructuring of CU's existing preference model.
- **Preferred Name** | Allow for preferred name personalization
Integrate preferred name data from CU source systems to allow for improved audience personalization. We will create corresponding preferred name personalization options in Marketing Cloud that include default values for auto-population in cases where the preferred name is blank.
- **Provisioning Flow** | Create new provisioning flow
Create new, modern provisioning flow to capture monthly eComm user changes. This will include the ability to view current license information, request new speedtypes, and

provide billing notes. Additionally, eComm specialists will now upload Skillsoft verification directly to the files option on the license.

- **Salesforce-Only License** | Create Salesforce-only license tier
Create a Salesforce-only license tier to increase access and affordability for campuses.
- **Subscriber Management** | Improve subscriber management
Identify opportunities to improve the management of the subscriber table to reduce storage costs, such as the removal of subscribers who no longer have an active email address in Salesforce.
- **Subscriber Reactivation** | Automatically reactivate subscribers
Develop a process to automatically reactivate inactivated subscribers who are active employees and/or active students to improve email deliverability while investigating the cause of the bounce.
- **Synchronized Data** | Enable synchronized data in Marketing Cloud
Enable synchronized data in Marketing Cloud to allow for improved use of Dynamic Content and Journey Builder.
- **True-Up Process** | Improve bi-monthly true-ups
Identify an appropriate process for bi-monthly true-ups based on feedback from the campuses.
- **VPN Restrictions** | Remove VPN login restrictions
Remove VPN restrictions for login to Salesforce and Marketing Cloud.
- **Additional Emails** | Add more email addresses to contact
Integrate additional, relevant email addresses with the contact record, such as CU Anschutz email address and CU Hospital email address. This will allow for greater segmentation of audiences and increased engagement.
- **Athletics Data** | Add athletics data to the interest object
Identify the source of athletic participation data and integrate it with the appropriate object in Salesforce to allow for interest-based outreach.
- **Automation of all DEs** | Automate all data extensions
Pilot the automation of the majority of data extensions on campus or campuses to eliminate the need for manual imports prior to every send.
- **Business Unit Consolidation** | Consolidate Selected Business Units
Consolidate selected business units to reduce program costs.
- **Certificate Data** | Add certificate data to the education object
Integrate certificate data (both degree and non-degree) with the education object in Salesforce to allow for more granular outreach to specific educational groups.
- **Club/Interest Data** | Add club/interest data to the interest object
Add relevant club and interest data to the interest object in Salesforce to allow for

interest-based outreach.

- **CU Ascend Cvent Integration** | Improve Data Availability for Advancement
Determine how to capture event data in CU Ascend.
- **Cvent Registration Cost Management** | Equitable Alternatives
Explore alternatives to current Cvent user fee based on factors such as event registration volume by user/campus.
- **Email Deliverability** | Improve email deliverability
Research and identify measures to improve email deliverability, such as Litmus, ReturnPath, etc.
- **Email Preference Flow** | Create Salesforce flow for email preferences
Create a Salesforce flow for the quarterly email preference and business unit request process to streamline submissions and increase accuracy.
- **Military Affiliation** | Identify contacts with military affiliation
Determine if it is possible to integrate military affiliation data for audience segmentation and targeted outreach.
- **Parent/Relationship Data** | Improve parent data in Salesforce
Identify improved measures to collect and maintain parent data in Salesforce, including relationship data (i.e. Parent A is related to Student A, who is related to Alumnus A).
- **Scholarship Data** | Integrate scholarship data
Identify a mechanism for the integration of scholarship data with the scholarship object in Salesforce to allow for targeted communications and outreach.
- **Unengaged Subscribers** | Segment unengaged subscribers
Determine a way to identify unengaged subscribers for the purposes of strategically excluding them for certain types of outreach and/or placing them in a re-engagement campaign.

Groups audience:

eComm

Source URL:<https://www.cu.edu/ecomm/strategy/program-roadmap>

Links

[1] <https://www.cu.edu/ecomm/strategy/program-roadmap>