



Summary of discussions and recommendations for

## **eComm Structure/costs**

October 2019

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### **Statement of Purpose**

The CU eComm program is a centralized/decentralized program by which university units send mass emails and manage event registrations. The source for constituent data is the Salesforce CRM database, which is fed by Advance, SIS and HCM. The technical infrastructure is housed in the Center of Excellence (COE) on the Boulder campus. Costs related to eComm licenses and support are fixed by the COE; campuses and system can add enhancements/new projects at additional cost.

eComm aims to foster relationships with CU constituents through efficient, effective and coordinated communications that allow the university to build a robust data set. Each constituent has a record unique to them.

Note: The Technology Enablement RFP soon to be awarded is likely to examine the structure and costs of eComm/CRM.

### **Guiding Principles for eComm structure/costs**

- The eComm program will operate from a common data set.
- Constituents will be at the center of communication activities.
- Many constituents, particularly donors and alumni, have touchpoints with multiple campuses.
- Campuses, Advancement and system have both individual and collective communication imperatives.
- eComm offers the best chance of compliance with internal and external communication mandates (FERPA, HIPPA, CAN-SPAM, PCI compliance, accessibility, CU Branding).
- eComm supports university data security imperatives.
- The university and its constituents benefit from consistent, coordinated communication.
- Consistent, coordinated communication is best delivered by a centralized campus/system operation rather than disbursed communicators.
- Communication disconnected from the common data set and tools exacerbate problems.

### **Communication Challenges at CU**

- Lack of a clearly articulated, constituent-centered vision for communications, resulting in a largely distribution-based communications culture.
- Perceived high cost of eComm tools.
- Limited support for eComm from COE and varied support models on campuses.
- "Rogue" databases and misconceptions about data ownership.
- Threats to information security and compliance (FERPA, HIPPA, CAN-SPAM, accessibility, PCI).
- Differing and disconnected policies.
- Constituents unhappy with lack of consistency/coordination from various CU units.
- Inefficiencies and elevated costs resulting from varied communication tools/activities.

### **ROI of Consistent, Effective Communications**

- More deliberate, meaningful interactions with constituents based on their interests and preferences.
- Compliance with federal and university mandates and ability to scale as changes occur.
- Data-based engagement that allows tracking and targeting of constituents.



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- AI and predictive intelligence that allow better understanding of constituents and improved ability to predict behavior and develop strategies accordingly.
- Fiscal responsibility that reduces funding spent on other data platforms, enhances student recruitment and increases fundraising revenue and donor retention.
- Ability to measure engagement on constituents and individual emails over time.
- Potential to reduce overall number of emails sent to constituents while increasing overall engagement.

### **Recommendations**

- Ensure that an assessment of eComm structure/costs is part of Tech Enablement project, with the goal of a consistent funding and support model.
- Create a task force under the auspices of eComm governance to inventory communication activities/tools across campuses and system, focusing on the top 20 communication senders and vehicles.
- Adopt and promote constituent-centered recommendations from eComm subcommittee across campuses/system.