

Contacts without Email Addresses

Understanding the Implications and Associated Cost Savings

eComm's Original Goal

When it was originally launched in 2016, the eComm Salesforce implementation was designed to provide a 360-degree view of all CU constituents. At that time, there were few other Salesforce implementations at CU, so eComm quickly established itself as the CRM environment that gave communicators and event planners access to detailed information surrounding 1.5 million constituents.

Trajectory Changes at CU

In the years that followed eComm's implementation, however, the CRM landscape at CU began to change. The trajectory of the campuses became more clear and focused on a decentralized CRM model rather than a single solution housed at the System. As this new goal began to materialize, several new implementations made it clear that eComm could not provide the detailed, 360-degree that it originally promised:

- **Advancement:** Donor information in the eComm implementation was already limited (donor = y/n); this limitation led to many manual processes that hindered Advancement's ability to improve engagement and outreach efforts. The Ascend Salesforce implementation, scheduled to launch in 2023, will open a door to structuring communications based on granular donor data and actions that are not visible (and that should not be visible) in the eComm implementation.
- **Anschutz:** Anschutz is currently exploring opportunities for a campus-specific implementation that could guide recruitment and admissions, academic advising, student success, and more.
- **Boulder:** Boulder's Salesforce implementation (sometimes referred to as CRM01) was one of the founding Salesforce orgs at CU. That implementation has increased its focus on academic experience and advising to ensure success for enrolled students.
- **Denver:** Denver is exploring its options for a campus-specific CRM implementation, and a Salesforce instance already exists in the Business School.
- **Colorado Springs:** The UCCS campus has emerged as a new leader in the CRM space at CU, with implementations for recruitment, admissions, and student success.
- **Integrated Online Services (IOS):** The IOS org exists as a multi-campus CRM implementation, but only for leads and students of a selected group of CU's online program offerings.

In reviewing the implementations above, it becomes increasingly clear that eComm no longer provides a 360-degree constituent view of CU's constituents that is compatible with campus engagement imperatives.

Constituent Engagement and Outreach

Despite the lack of a true 360-degree view into CU's constituents, eComm still provides a valuable and essential service to the campuses: constituent engagement and outreach. CU's communicators and event planners continue to require a robust set of tools for both email marketing and event management, and eComm remains an essential provider of these services.

While the UCCS and CU Boulder implementations mentioned above also utilize a Marketing Cloud implementation for constituent outreach, they continue to rely on eComm's (Cvent) for event management services. Longer term, the UIS CRM team believes that we will be able to provide substantial cost savings to the campuses by offering a Marketing Cloud service that connects with multiple Salesforce instances. This future state will not only provide streamlined user experience and cost savings but also an opportunity to address a neglected CU-wide email preferences model for CAN-SPAM compliance and improved constituent experience.

eComm's Data Model

eComm currently operates based on a series of integrations from CU source systems: Advance/Ascend, HCM, Campus Solutions, and IDM. The integration currently populates eComm with data for all CU constituents (managed and consolidated via MDM), regardless of whether or not an email address is present. This integration model made sense when eComm was designed to provide a 360-degree view of constituents, but it has become less relevant (and more costly) as the purpose of eComm has evolved.

Given the CRM landscape at CU, eComm's service has refocused on providing email marketing and event management solutions to 250+ users across the campuses...not a 360-degree view of all CU constituents. With this shift, we have an opportunity to reexamine eComm's data model for constituents without email addresses while increasing fiscal responsibility.

Contacts without Email Addresses

CU currently spends roughly \$34,000/year on data storage in eComm's Salesforce instance. One of the elements that contributes to this cost is contacts without email addresses. A recent review of Salesforce storage indicates the following:

Over 1,000,000 individual contacts in Salesforce do not have an email address present in any email field (note that there is likely some contact duplication between these categories):

- 601,894 have an Advance/Ascend ID
- 75,595 are flagged as do not contact
- 74,310 are deceased
- 54,964 have a Student ID
- 47,291 are opted out of all emails
- 25,389 have an Employee ID

Each of these scenarios would have specific implications for how eComm users do business today; however, these implications can be effectively addressed as documented below.

Advance/Ascend IDs without Email Addresses (601,894)

Current Process: eComm specialists routinely match on Advance/Ascend ID when importing lists of alumni/donors/others into a campaign when the querying data fields do not exist in Salesforce. Currently, the majority of contacts imported through this process will match regardless of whether or not an email is present.

Proposal: Exclude contacts with Advance/Ascend ID but without email addresses from the eComm integration.

After Integration Modification:

- **Matching:** When contacts with Advance/Ascend IDs but without email addresses are removed from the integration, eComm specialists uploading data will encounter a higher number of rejected records due to contacts without email addresses no longer being captured in the integration.
 - If an eComm specialist needs to inform the user about the number of rejects, there are two available options:
 - Export the rejected records from Apsona and alert the user that the contacts do not have email addresses in Advance/Ascend.
 - Ask users to exclude contacts without email addresses in the Advance/Ascend exports to avoid extra work.
- **Audience Volume Calculation:** eComm specialists and users will not be able to calculate audience volume based on contacts in a campaign. Calculating audience volume in this way (even in our current process) is not accurate, however, due to the inability to account for CAN-SPAM criteria or for the best practice reporting logic that excludes contacts without email addresses to improve report processing times and ensure fewer data timeouts during an email send.
- **Reporting Logic of Email ≠ Blank:** Current best practices require eComm specialists to include Email ≠ Blank when targeting the primary email address for the performance issues outlined above. This logic will no longer be needed after the integration is modified.
- **If Email Address Added:** If Advance/Ascend adds an email address to a contact that did not previously have one, the integration will capture that record and populate it in Salesforce (as long as they are NOT flagged as Do Not Contact or Deceased; see below).

Do Not Contact without Email Addresses (75,595)

Current Process: Contacts where Do Not Contact = True are already excluded from commercial communications when Meets eComm Contact Criteria = True. Since Do Not

Contact status is generated from Advance/Ascend, the field does not apply to transactional communications.

Proposal: Exclude contacts where Do Not Contact = True from the eComm integration, regardless of whether or not an email is present.

After Integration Modification:

- The Meets eComm contact criteria field would be modified to remove the existing filter Do Not Contact = True since contacts with that criteria would no longer exist in Salesforce.
- If a contact with an Advance/Ascend ID and an email address were to receive a Do Not Contact designation from Advance/Ascend, that record would be automatically removed from Salesforce.
- If a contact with an Advance/Ascend ID and an email addresses had a Do Not Contact designation removed in Advance/Ascend, that record would be automatically populated in Salesforce.

Deceased without Email Addresses (74,310)

Current Process: Contacts where Deceased = True are already excluded from commercial and transactional communications regardless of whether or not an email address is populated. For commercial communications, Deceased = True is automatically excluded when Meets eComm Contract Criteria = True. For transactional communications, reporting logic includes the filter Deceased = False.

Proposal: Exclude contacts where Deceased = True from the eComm integration, regardless of whether or not an email is present.

After Integration Modification:

- The Meets eComm contact criteria field would be modified to remove the existing filter Deceased = True since contacts with that criteria would no longer exist in Salesforce.
- If a contact with an Advance/Ascend ID and an email address were to receive a Deceased designation from any source system, that record would be automatically removed from Salesforce.
- If a contact with an Advance/Ascend ID and an email address was erroneously marked as deceased, that record would be automatically populated in Salesforce upon correction.

Student IDs without Email Addresses (54,964)

Current Process: Contacts with Student IDs exist in Salesforce regardless of their enrollment status but are excluded from reports and email sends if the targeted email address is blank.

Proposal: Exclude contacts with Student IDs but without email addresses who are NOT active enrolled from the eComm integration.

After Integration Modification:

- eComm would continue to capture active enrolled students in the integration to monitor issues that would prevent receipt of communications.
- If a contact with a Student ID but without an email address became actively enrolled, they would be captured in the eComm integration.

Contacts Opted Out of All Emails without Email Addresses (47,291)

The team is still brainstorming how we want to approach contacts without email addresses who are opted out of all emails. Advance/Ascend contains the same email opt out data housed in eComm based on weekly manual uploads, but need to complete additional troubleshooting to ensure that the opt out values are retained should a new email address be added to the contact in the future.

Employee IDs without Email Addresses (25,389)

Current Process: Contacts with Employee IDs exist in Salesforce regardless of their employment status but are excluded from reports and email sends if the targeted email address is blank.

Proposal: Exclude contacts with Employee IDs but without email addresses who are NOT active employed from the eComm integration.

After Integration Modification:

- eComm would continue to capture active employed contacts in the integration to monitor issues that would prevent receipt of communications.
- If a contact with an Employee ID but without an email address became actively employed, they would be captured in the eComm integration.

Next Steps

The System team is continuing conversations related to the items above and will be gathering information from the integrations team. We'll provide an update to the campuses soon.