



IU CRM:

# Communications Adoption

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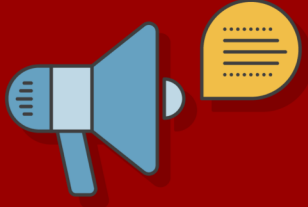
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# IU CRM: Pillars of Adoption

## IU Communications

Used for mass communication, contact management, and email campaigns.



## Admissions / Recruiting

### (Undergraduate)

Used for campaigns, individual interactions, and admissions event management.



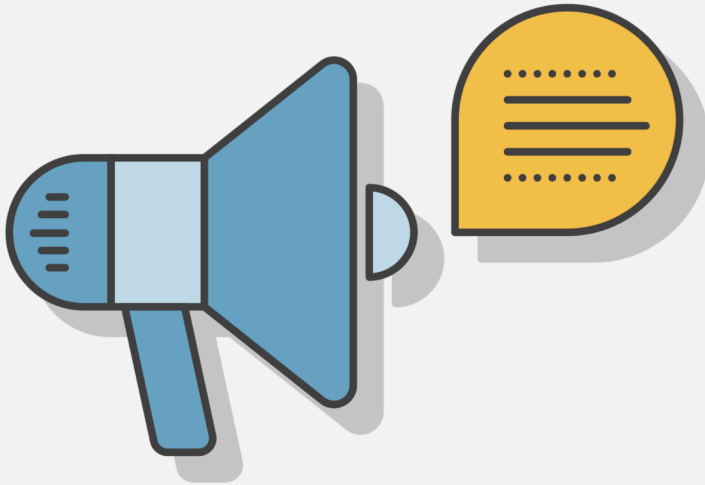
## IU Human Resources

Used to manage employee case records and associated service requests.



# Communications

A pillar of adoption



- Primary stakeholder:
  - IU Communications
- Current Adoption:
  - 210 units and growing
  - All campuses
- Scalable & flexible
  - From single communications shop to full campus
  - Units self-defined by adopter interest, business practices
- Intended for anyone wanting to send mass email

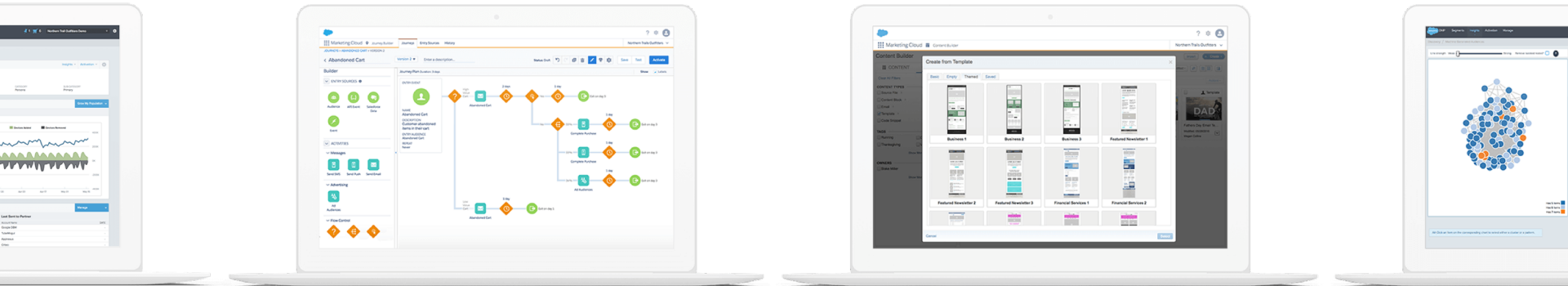
SECTION 1

# Top features



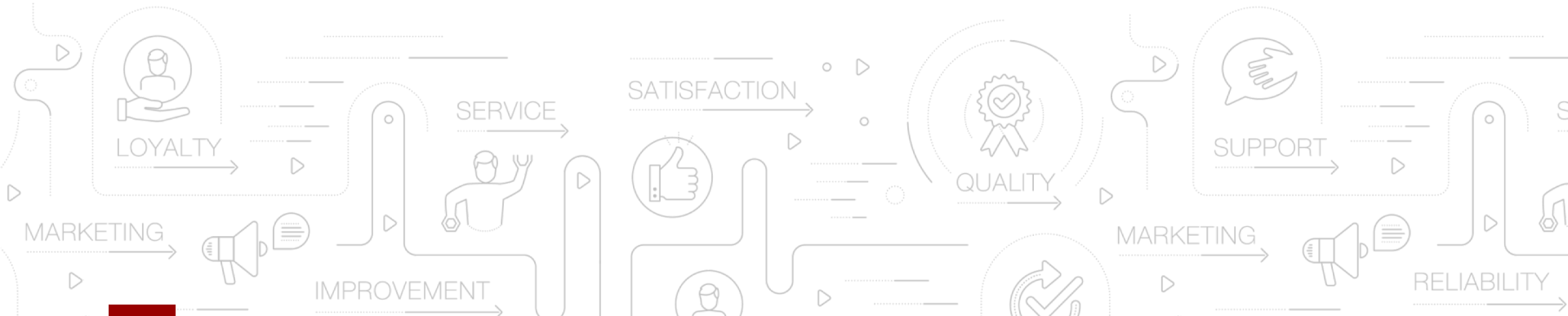
# Marketing Cloud overview

- CRM Platform Communication Module
- Marketing Cloud Business Units
- Email Studio and Content Builder



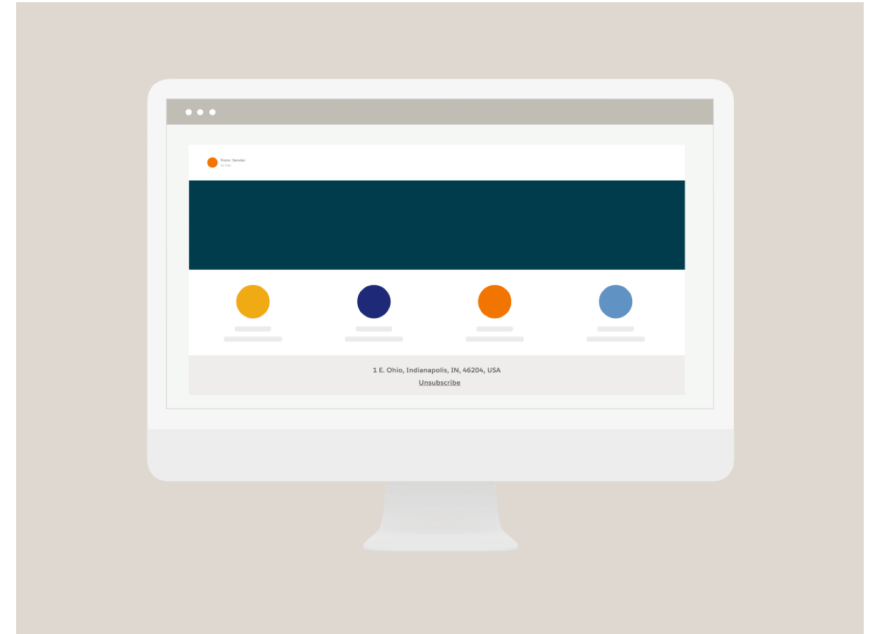
# List management

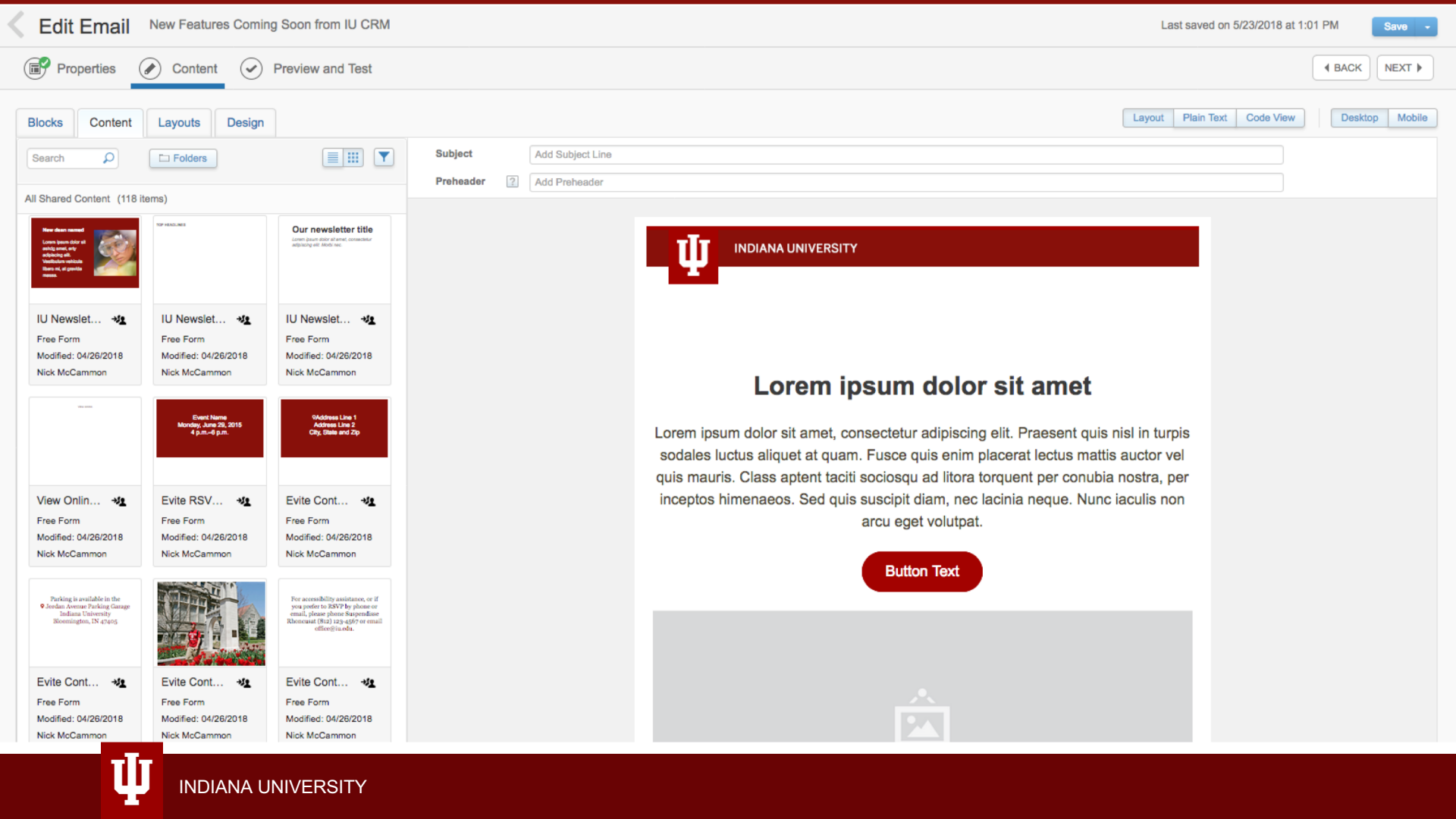
- CRM Contacts and Campaigns
- Marketing Cloud All Subscribers
- Marketing Cloud Data Extensions
- Distribution List Uploads

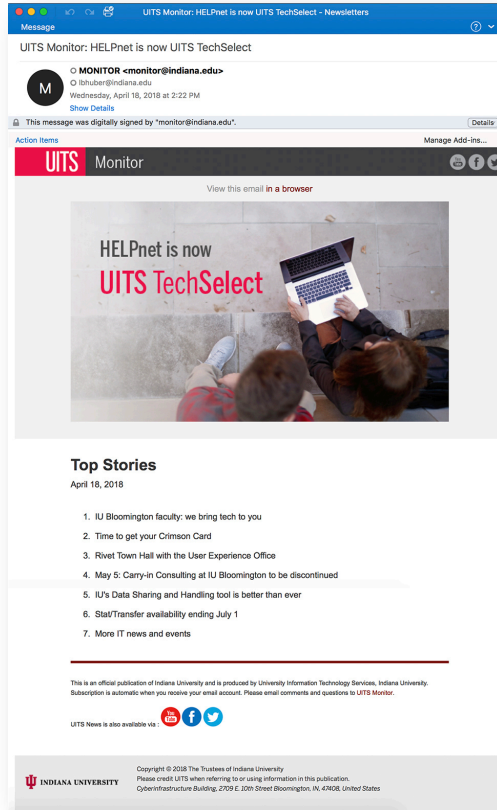


# Building emails

- Asset management and folders
- Create template-based and HTML emails
- Content development







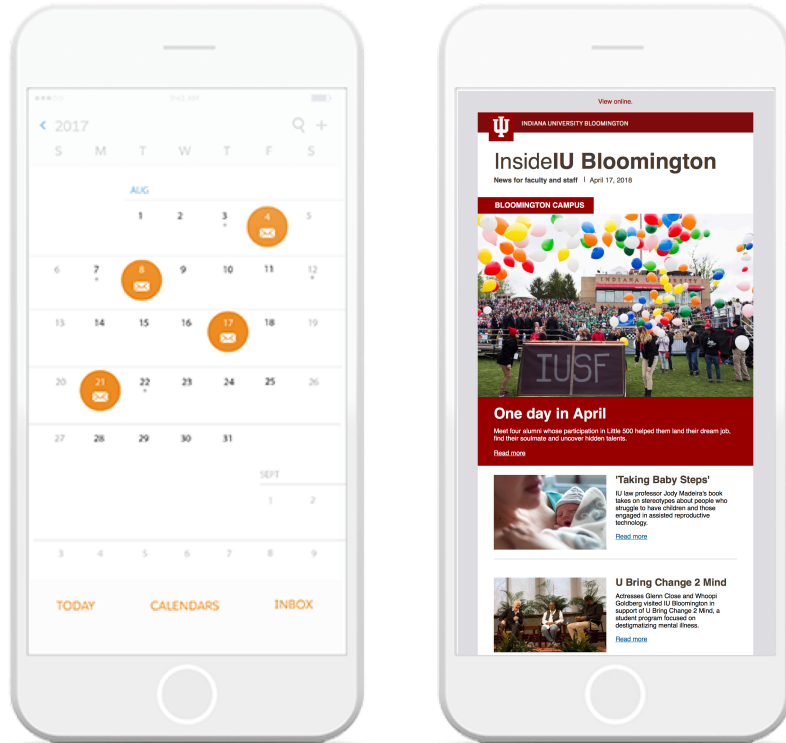
# Templates

## *User friendly!*

- Create email based off templates
- Save locally and edit templates
- Create templates
- IU branded assets (e.g. IU Trusted footer)







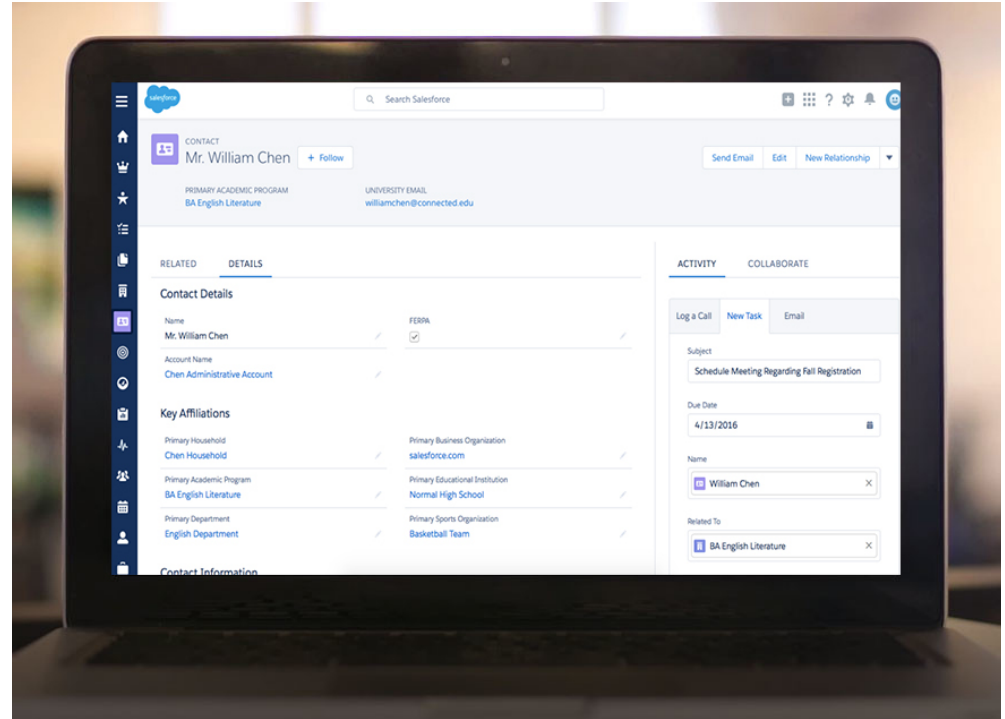
# Email sends

- User-initiated
- Scheduled
- Advanced automation



# Subscription management

- My Lists
- Data extensions and publication lists





Subscribers

My Subscribers

My Lists

.archived

CC 2018 (April)
CrimsonCard 2018 Recarding
DSI

Duo lists

I-Light

IT Connections

Orientation

Test Lists

Umail Sends

My Groups

Publication Lists

Suppression Lists

Profile Management

Preference Management

Data Extensions

Data Extensions

Salesforce Data Extensions

Data Filters

Shared Items

Get access to enhanced segmentation!

My Lists

Create

Delete

Move

Properties

Subscribers

Import

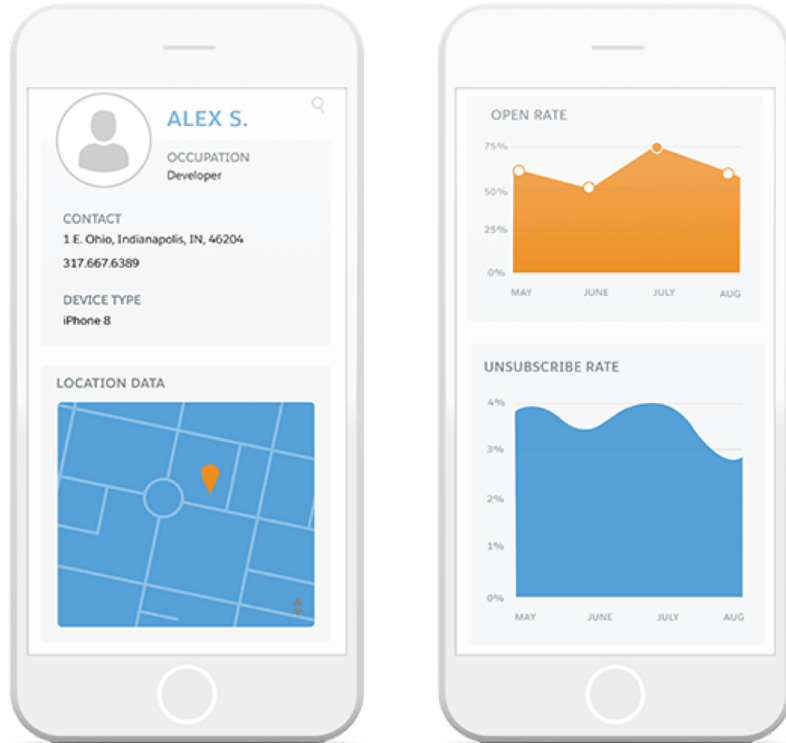
Export

Guided Send

Manage Welcome Email

Create Group

	Name	Description	Subscriber Count	Associated Campaigns	Welcome Email Assigned	Created
<input type="checkbox"/>	<a href="#">2018 AbD registrants</a>		387		No	5/7/2018 10:26 AM
<input type="checkbox"/>	<a href="#">2018-04-11 AbD non-IU e...</a>		19		No	4/11/2018 11:21 AM
<input type="checkbox"/>	<a href="#">2018-04-12 AbD IU event...</a>		294		No	4/12/2018 10:27 AM
<input type="checkbox"/>	<a href="#">2018-04-16 AbC IU List (...)</a>		302		No	4/16/2018 10:39 AM
<input type="checkbox"/>	<a href="#">2018-04-16 AbC Non-IU...</a>		28		No	4/16/2018 10:29 AM
<input type="checkbox"/>	<a href="#">2018-04-24 AbD Non-IU</a>		36		No	4/24/2018 10:50 AM
<input type="checkbox"/>	<a href="#">2018-04-24 AbD Outside...</a>		22		No	4/24/2018 3:47 PM
<input type="checkbox"/>	<a href="#">2018-05 Kreager Retirem...</a>		16		No	5/1/2018 10:00 AM
<input type="checkbox"/>	<a href="#">AbD Speaker Announce...</a>		183		No	3/6/2018 3:29 PM
<input type="checkbox"/>	<a href="#">CACR Contacts</a>	List originally imported from Constant Contact	2742		No	4/10/2017 3:25 PM
<input type="checkbox"/>	<a href="#">IT Training Newsletter</a>	IT Training newsletter recipients	6591		No	7/10/2017 10:14 AM
<input type="checkbox"/>	<a href="#">Monitor External List</a>	List of external contacts for Monitor newsletter	5		No	8/31/2015 3:50 PM
<input type="checkbox"/>	<a href="#">Science Node</a>		38287		No	8/19/2015 8:37 AM
<input type="checkbox"/>	<a href="#">Science Node Non US Ap...</a>	Science Node Non US April 2017	1117		No	4/7/2017 4:10 PM
<input type="checkbox"/>	<a href="#">Statewide IT 2018</a>		5301		No	3/22/2018 10:06 PM
<input type="checkbox"/>	<a href="#">UITS All December 2017</a>	All UITS employees	1568		No	12/11/2017 3:15 PM
<input type="checkbox"/>	<a href="#">UITS All March 2018</a>		1577		No	3/8/2018 1:51 PM
<input type="checkbox"/>	<a href="#">UITS Bloomington 2-2018</a>	All UITS Bloomington employees	1013		No	2/20/2018 2:55 PM
<input type="checkbox"/>	<a href="#">UITS Managers 3-2018</a>		198		No	3/5/2018 1:34 PM
<input type="checkbox"/>	<a href="#">UITS Managers Test</a>	List of managers for testing purposes	198		No	3/5/2018 3:19 PM
<input type="checkbox"/>	<a href="#">UITS-Bloomington, IUPUI...</a>	All IUPUI and IUB UITS employees	1399		No	11/17/2017 9:27 AM
<input type="checkbox"/>	<a href="#">Umail Students 2-2018</a>	All students using Umail accounts	206104		No	1/31/2018 4:22 PM
<input type="checkbox"/>	<a href="#">UXO ABD Conference List</a>	Accessible by Design Conference mailing list	1581		No	2/19/2018 9:36 AM
<input type="checkbox"/>	<a href="#">Watkins additions</a>		14		No	3/6/2018 9:46 AM



# Send analytics

- My Reports
- Email Send Reports

Tracking

My Tracking

- My Reports
  - Report Status and History
  - Administrator Reports
  - Subscriber Reports
  - Email Reports
  - Tracking Reports
  - Custom Reports
    - IU User Audit Report
    - Journey Builder Audit Report
- My Data

My Tracking > Tracking Details

Select Recipients

Export

Overview

Click Activity

Conversions

Surveys

Job Links

Summary

Job ID: 144565

Name : Testing Email - 2 Days Out

Subject : Test Email - 2 Days to Your Event!

Date Sent: 6/27/2016 8:01 PM

Total Sent: 2

Data Extensions: DELETED Data Extension (2) sent  
(Using All Subscribers)(2 sent)

Send Performance

Delivery Rate: 100%

Total Bounces: 0

Hard Bounce: 0

Soft Bounce: 0

Block Bounce: 0

Delivered: 2

Open Performance

Inbox Activity

Viewing : Current Activity

	Total	Unique	
Opens	2	2	100%
Clicks	0	0	0%
Forwards	0	0	0%
Conversions	0	0	0%
Surveys	-	0	0%
Unsubscribes	-	0	0%

Unengaged Subscribers

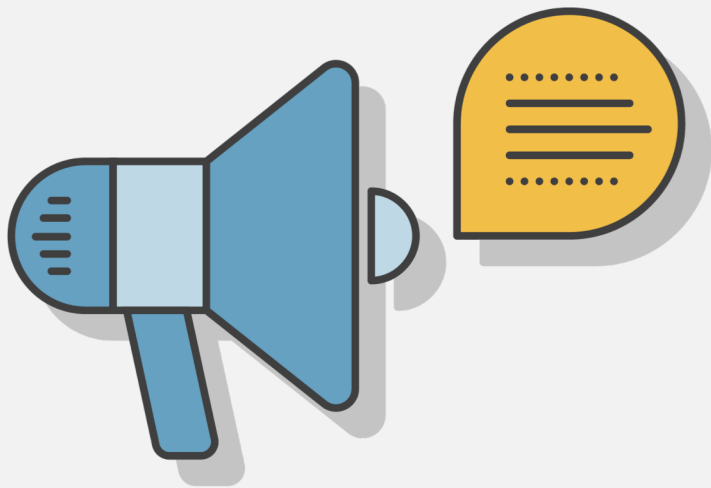
	Unique
Total Delivered	2
Did not click	2
Did not open	0

Forward to a Friend Activity

SECTION 2

# Other features

# Send Management



- Reply mail management
- Sender profiles
- Delivery profiles
- Sender classifications

# Security & IP Reputation



- Digital signatures
- Whitelisted IP
- Throttling



# Demonstration



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## SECTION 3

# How to adopt



# Adopting the IU Communications Pillar



***IU Communications is already in the Salesforce.org ELA***

- Simple to adopt: New adopter inquiry
- No change requests, scoping, prioritizing, cost, etc.



***Step 1 is always the same!***

**crm.iu.edu**

**Ask about adopting IU CRM**

**Adoption inquiry form**



# Onboarding process

- Acceptable Use Agreement
- FERPA compliance form
- S/MIME Certificates
- Migrate lists / contacts
- Submit MOU forms to IU Communications
- Obtain licensing
- Attend training sessions by IU Communications



# crm.iu.edu

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