SOUTHERN METHODIST UNIVERSITY
Marketing Cloud Strategy Recommendations

Huron Consulting Group

HURON

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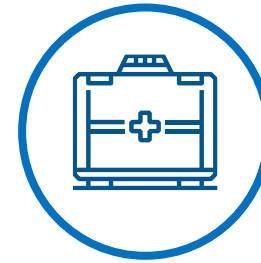
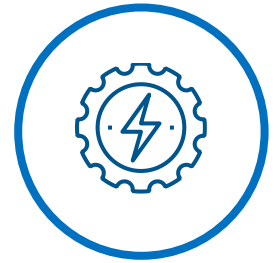**2,000+** clients served in 2022

6,500+ global employees

Industries We Serve

HIGHER EDUCATION

HEALTHCARE

COMMERCIAL

Huron helps **higher education and research institutions** transform to foster innovation, improve financial health, drive donor outcomes, and strengthen student success.

Huron in Education

Strategy and Innovation

- Frame institution's strategic options
- Develop robust, sustainable portfolios across academics and research
- Identify and execute partnerships and strategic alliances
- Optimize value propositions, academic offerings, onboarding and engagement activities and financial aid resources

Business Operations

- Assess, design, and implement organizational and operational change
- Align financial plans with strategic plans
- Transform research administration support models
- Assess and develop programs to mitigate compliance risk
- **Optimize operating models, processes, assets, and service portfolios**

Digital Transformation

- **Evaluate processes, systems, and structures and data and reporting needs**
- **Evaluate institutional readiness**
- Create a more seamless, personalized student experience
- **Apply analytics and automation**
- Manage the business of research
- Enhance privacy and security governance

Organizational Transformation

- Create nimble organizational **structures and processes**
- Develop a culture that embraces enterprise stewardship and change

Research Enterprise

- Manage and optimize the business of research
- Maximize cost recovery
- Mitigate compliance risk

Student and Alumni Strategy

- **Create a more seamless, personalized constituent experience**
- Identify, attract, and enroll "best-fit" students for the institution

Huron Team

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Overview

This presentation is design to **consolidate key elements of strategic discovery engagement** with SMU DEA, taking the most relevant findings from Discovery, Discussions, Assessments, Marketing Technology Inventory, Goals, Skillset/Capabilities, Process **to recommend a Digital Marketing Technology Strategy to support SMU DEA Marketing Cloud implementation roadmap**

The objective of this presentation is to help strategize and prioritize DEA objectives in a succinct way, stitching all the elements of this engagement together, to **paint a clear picture of the journey we recommend you take in your adoption and rollout of the Salesforce Marketing Cloud platform**

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   - Governance – Strategic, Operational
   - People – Skill sets and Roles
   - Martech Stack
   - Business Unit Rollout

4. Phased Roadmap and Next Steps

Strategy Workstream Objectives and Goals
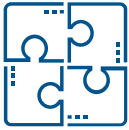
Conduct a **Capabilities, Alignment, and Technology Assessment** to understand what is needed to prepare for, successfully manage, and implement Salesforce Marketing Cloud for SMU

Which will create the **Foundational Infrastructure** to roll out Marketing Cloud and extend capabilities across SMU, finding economies of scale along the way.

So that SMU can leverage Marketing Cloud as a platform to **enable goals focused on donor outcomes and Unified Communications and Branding.**

Project
Methodology

Overall Project Scope

Strategy

Define a strategic approach to managing the infrastructure, governance, rollout, and adoption of Marketing Cloud for Development and External Affairs, and University Communications

- Stakeholder Discussions (Qualitative)
- Marketing Maturity (Quantitative)
- Marketing Technology Stack and Roadmap
- Staff Readiness
- Governance
- Business Unit Rollout

Implementation

Implementation of Marketing Cloud to automate key marketing tasks focused on development, cultivation, stewardship, and providing personalized engagement to university constituents for DEA and University Communications

- Confirm Access of Data, Platforms
- Account Setup
- Data Model Creation & Connection
- Email Studio
- Journey Builder
- Subscription Center
- Training, Deploy and Sustain

Strategy Engagement Phases

1 Current State Discovery

- Stakeholder Analysis
- Martech Inventory
- Current Processes
- Capabilities Inventory

2 Future State Analysis

- Vision
- Governance
- Center of Excellence
- Martech Roadmap

3 Defined Strategic Plan

- Summarized Recommendations
- Resource Plan
- Center of Excellence / Innovation
- BU Rollout Strategy and Adoption

Strategy Engagement Elements

Marketing Technology Stack and Roadmap

- Current Tech Usage across DEA and Alumni teams in schools and units
- Data Access and Usage
- Identify and document platforms

Stakeholder Discussions (Qualitative)

- Provide Context
- Understand Pain Points
- Open-ended questions

Marketing Maturity (Quantitative)

- Defined Across 6 Main Pillars
- 30-question Assessment

Staff Readiness

- Central DEA
- School/Unit Usage
- Matching Tech with Capabilities

Governance

- Management Model
- Center of Excellence
- Establishing Priority for Updates and Troubleshooting

Business Unit Rollout

- Gaining Adoption
- Training and Onboarding
- User Access and Permissions

2

Where SMU is Today

What We Heard

"We need Multi-Channel Personalization"

"DEA doesn't have specific marketing automation technology"

"Everything is very technology-led and not data-led"

"Don't have a warehouse available"

"Data is decentralized"

"CDP is important"

"Personalization lacking in some areas"

"No dedicated Training Staff"

Where SMU Is Today

"We need to be looking at things from the perspective of the constituent"

Personalization & Analytics

- Lack of analytics around Send Rates
- Lack of insight into Email Opens and Engagement
- Need better understanding of Website Click Through Navigation

Transparency between DEA & Units

- Currently not a shared calendar to coordinate
- Unsure of the emails sent to a particular constituent
- Branding Misalignment

Training and Knowledge Transfer

- Lack of Marketing Cloud knowledge within units
- No dedicated training staff
- Marketing team exists for each unit but use of technology is diversified

Centralized Data

- Data is not centralized, and lists don't take up un-subscribes
- Different outlets to get lists for various units (BBEC, Excel etc.)

Digitally Mature Universities
Define Current State to Help Inform Strategic Approach

Digitally-Versed Marcom Staff

Understanding of marketing technology landscape and how to enable outcomes

Omnichannel Personalization

Bringing constituent behavior from across different channels to amplify engagement further
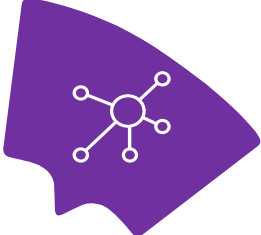
Campus Coordination

Alignment within department/unit and also across campus to drive a consistent constituent experience
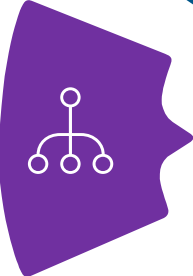
Analytics

Understanding both channel outcomes as well as constituent outcomes; attribution modeling

Coordinated Data

Unifying demographic and behavioral data to then make that data available for deeper engagement

Marketing Automation

Driving constituents through an automated, multi-step journeys to drive outcomes

Overall Maturity Level – Broken out by Main Entities

Non-DEA Average
2.73

Combined Average
2.40

DEA Average
1.95

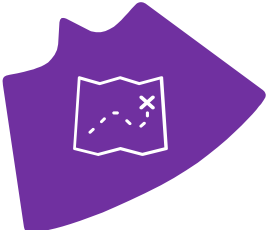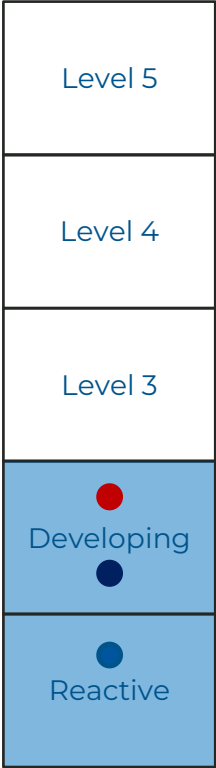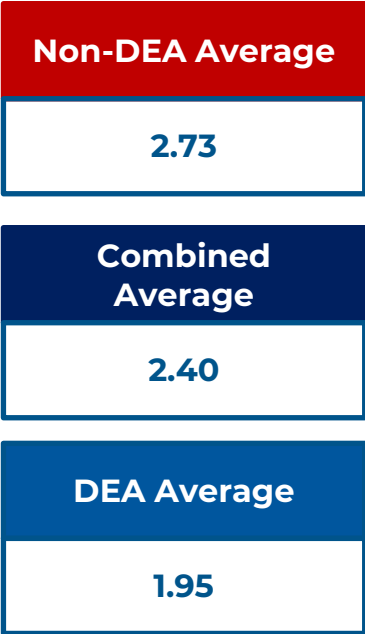| Level		Name	Description
Level 5		**Intelligent**	Digital Marketing is at the center of how your organization develops and manages marketing campaigns. You have key campus partnerships and drive innovation.
Level 4		**Connected**	You have a staff that concentrates on expanding and innovating your digital marketing capabilities. You are likely ready for something like a CDP to help develop real-time personalization and more.
Level 3		**Digitized**	Digital pillars each have some level of sophistication. Time to expand further across CRM, journeys, personalization, etc. If you're a central unit, campus partnerships should be your focus.
Developing	● ●	**Developing**	Made some initial wins, but need to expand upon what you may have been able to achieve thus far. Analytics needs to become core to how you manage campaigns.
Reactive	●	**Reactive**	Trying to understand where to start. Build some core competencies in key areas to start, looking for initial wins wherever you can.

Digital Maturity by Specific Factors

Non-DEA Average
2.73

Combined Average
2.40

DEA Average
1.95

Factor	DEA	Non-DEA	Combined
Staff	2.25	2.89	2.62
Coordination	2.53	2.89	2.74
Data	1.98	2.78	2.44
Marketing Automation	1.4	2.45	2.01
Omnichannel Personalization	1.45	2.55	2.08
Analytics	2.08	2.78	2.48
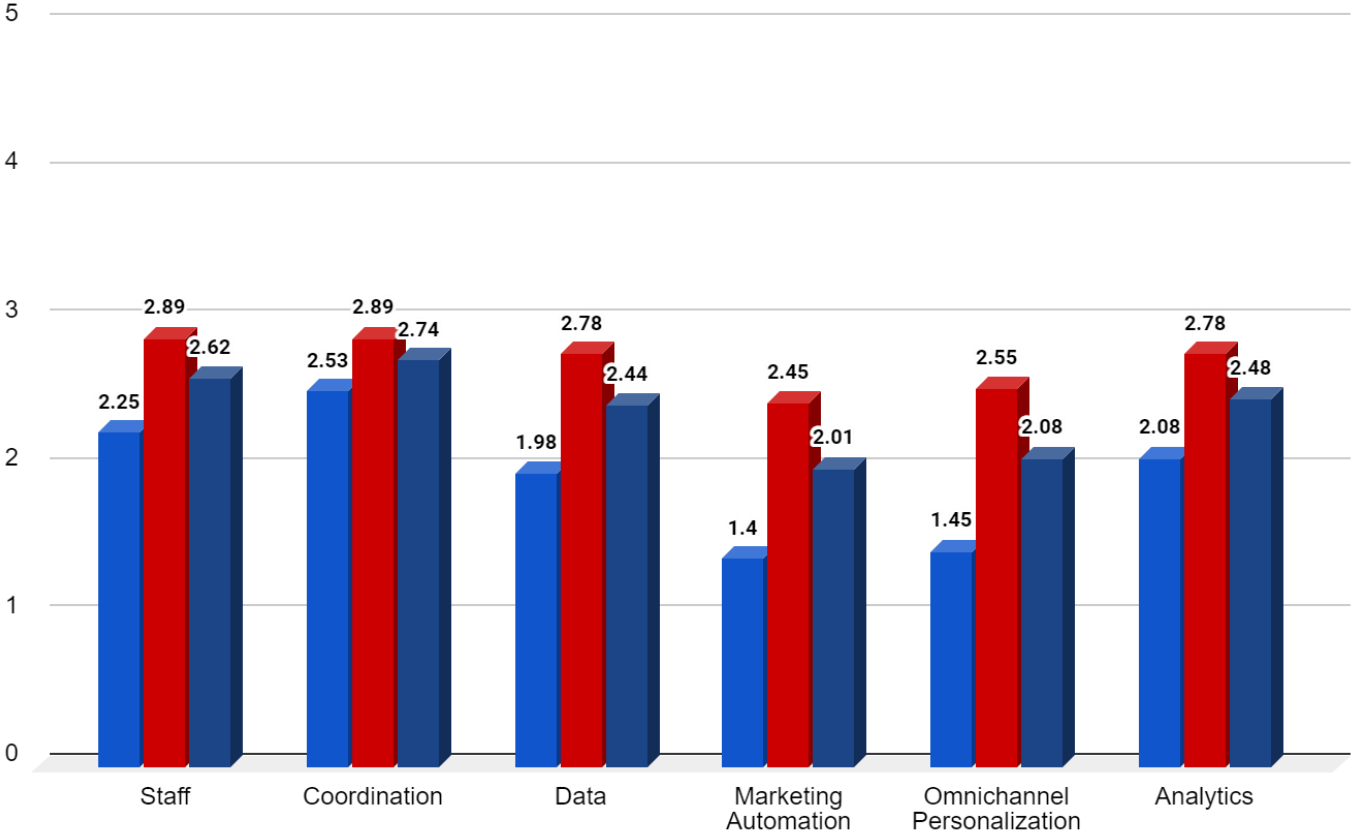
Digital Maturity by Specific Factors: Combined Scores

Combined Average

2.40

- ▨ >0.25 below avg.
- ▨ >0.25 above avg.

Staff	2.62
Readiness	2.47
Knowledge Diffusion	2.79
Center of Excellence	2.16
Hiring	3.16
Training	2.53

Data	2.44
Accessible & Timely	2.95
CRM Data for Segmentation and Personalization	2.68
Integrations	2.11
Unified Consent Elections	2.16
Customer Data Platform	2.32

Omnichannel Personalization	2.08
Segmentation	2.00
Website	2.05
Real-time, Multichannel	2.16
Dynamic Email Content	2.11
Real-time Advertising	2.11

Process/Coordination	2.74
IT Partnership	3.16
Shared Messaging	3.89
Governance	2.32
Shared Email Calendar	1.74
Lead Management	2.58

Marketing Automation	2.01
Multichannel Automation	2.11
Webform Automation	2.05
Multi-step Journeys	2.37
Business Unit Structure	2.00
Artificial Intelligence (AI)	1.53

Analytics	2.48
Type of Analysis	2.32
Marketing Intelligence Platform	2.37
Dashboards	2.95
Conversion Metrics	2.47
Leadership Awareness and Understanding	2.32

Key Organizational Challenges

- Spamming our alumni and donors, **lack of targeted emails**

- **Lack of central email automation, personalization**, connection of all data inputs to learn about our donors (so they read the emails), robust analytics

- No centralized data source and integration between platforms - No one advertising tactic used by any one program. **Limited coordination on alumni lists**, not sure which DEA unit is sending out emails

- Varied objectives between DEA and other units

- **Unsubscribe and re-subscribe** - if you unsubscribe from one SMU email, you unsubscribe from all

- Lack of a centralized, coordinated editorial calendar – Concern that **centralized calendar** could lead to school emails being de-prioritized

3

Where You Want
To Be

Future State

"We need to be looking at things from the perspective of the constituent"

Create a personalized, brand messaging-aligned constituent experience built upon a data-driven and analytics-focused approach

Increase visibility toward SMU's Impact

Comprehensive View of Constituent Behavior

Increased Constituent Engagement

Conversion Rate Optimization

Recommendations

Main Areas of Strategic Guidance

Governance 1

Guiding How Things Get Done
- Building a Governance Framework
- Management Model for Campus
- Center of Excellence

People 2

Building the Skillset and Roles
- Roles to Achieve Success
- Upskilling Staff

Martech 3

Enabling Outcomes Through Technology
- Technology to Enable Outcomes
- Phasing of New Technology

BU Structure and Rollout 4

Structuring Marketing Cloud
- Initial BU Structure
- Further Expansions

Governance

Insights

- Want to better understand how to collaborate better (coordinated calendar and consistency in branding)

- Need a clear understanding around a source of truth around constituent data

- Looking for a centralized location for resources to learn and become better users

- Focus on easy access to constituent data and understanding who can access data and create data extensions within their business units

Recommendations

1. Governance structure that includes three core groups:

   o **Steering Committee** driving overall strategy

   o **Governance Committee** managing Marketing Cloud platform on a day-to-day basis

   o **Center of Excellence** that brings all users from across campus to learn, train, upskill, help with overall adoption

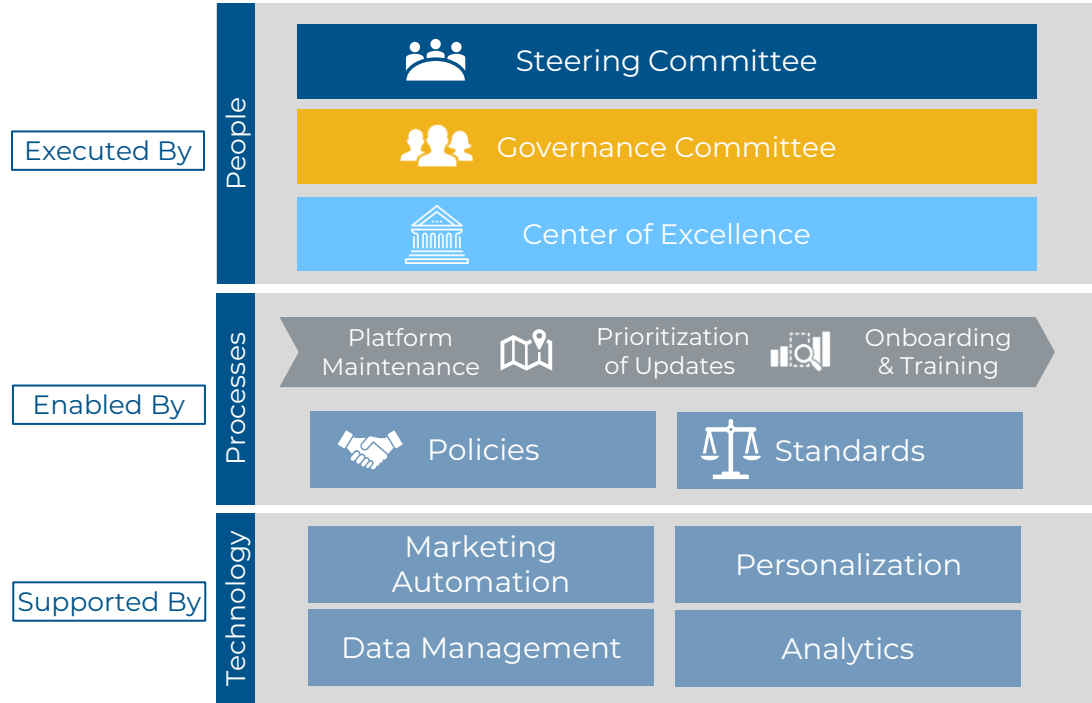2. Given resource-constraints, develop a **User Support-focused Model** that drives understanding and knowledge throughout campus that also includes **strong central management** that **defines standards and parameters** to ensure proper platform usage

3. Central roles focused on Marketing Cloud Administration, Data Management and Analytics, Content Creation and Delivery, and Training will be vital to success of Marketing Cloud platform, especially as it expands across campus

Building a Governance Framework

Executed By

People

| Steering Committee |
| Governance Committee |
| Center of Excellence |

Enabled By

Processes

Platform Maintenance — Prioritization of Updates — Onboarding & Training

| Policies | Standards |

Supported By

Technology

| Marketing Automation | Personalization |
| Data Management | Analytics |

- **Execute** Marketing Cloud initiatives and strategic projects

- **Enable** governance for marketing technology to improve engagement across the enterprise without creating a regulatory/governance bottleneck

- **Enable** and align key stakeholder groups

- **Support** a consistent approach by defining, managing, and maintaining Martech use across the enterprise

Governance Structure

	Steering Committee	Governance Committee	Center of Excellence
Purpose	Guide Strategy, Determine Priorities, Remove Roadblocks	Support Model, Day-to-Day Management, User Provisioning, Standardization of Usage	Support Model, Drive Adoption, Best Practices, Training
Roles Needed	**8-9** - Central IT Leader, Central Marketing Leader, AGAR Marketing Leader, Development Services Leader, DEA IT Leader, Donor Services Leader, 2-3 school/unit leaders **(Could also be ESILC or Core Group, based upon best fit)**	**6-8** - Marketing Cloud Administrator, Business Owner, Technical Owner, DEA Digital Marketing Lead, DEA MC Dev Lead, a Marketing Leader from outside DEA, an IT Leader from outside DEA	**Many** - Technical Owner, Business Owner, Training/User Support/Change Manager, MC Admin, MC Developer, DEA MC SMEs, All Campus MC Users
Meeting Cadence	Monthly initially, Quarterly ongoing	Weekly initially, Bi-weekly ongoing	Monthly, with asynchronous communication throughout
Initial Items to Address	Guiding Strategy and Develop Vision, Data Stewardship	Identify User Permission Roles, Data Stewardship, Email Templates, Brand Governance	User Onboarding, Training Documentation, Knowledge Diffusion of MC Platform, Communication of Vision/Goals

Selecting a Management Model

Evaluate Along a Scale Rather than as Absolutes

User Support Model

- Center of Excellence
- Train Users
- Establish Best Practices

Good model if:
- High # of siloed email systems
- High # of existing "communicators"
- No top-down mandate

Central Staffing Needs:
- MC Admin / Architect
- MC Designer / Developer
- User Support / Change Manager
- Training Manager

Agency Model

- Units, Groups as Customers
- Intake of Needs
- Deliver End Product

Good model if:
- Top-down mandate
- Charge model or centrally-funded
- Strong digital team with plenty of resources

Central Staffing Needs:
- MC Admin / Architect
- MC Designer / Developer
- Marketing Managers (more than 1)
- MC Specialists (more than 1)

Recommended Management Model at Launch

Not pure User Support Model, but geared towards Driving Adoption

SMU Support Model

- Center of Excellence as way to bring campus together
- Central DEA and IT Establish Standards of Use
- Central Users for AGAR Initiatives along with many users from across campus
- DEA and IT primarily driving strategy

Help drive adoption:
- Onboard and Train new users
- Provide Best Practices
- Knowledge Sharing

Central Staffing Needs (10-12*):
- MC Administrator (1)
- Email Studio Administrator (2)
- Content Creator (design and content) (4)
- Data Manager (1)
- Data Analyst (2)

*Most roles will likely be covered from existing staff

Staffing and Roles

Insights

- There is a variety of staff size and skill levels

- Some groups have dedicated staff while others do not

- Knowledge of available data and data stewardship is needed

- Creating awareness and excitement around Marketing Cloud is a necessity

- Training will be key for adoption of the solution

Recommendations

1. For the initial implementation, Huron recommends strengthening the strategic roles in **data architecture and analytics** (Development Services), as well as **creative and content** (Marketing and Communications).

   Having staff with a clear understanding of the **data architecture** and its integration to SFMC is key. Adding staff members, to support design and content creation and delivery will ensure a more supportive structure and the ability for multiple members of the team to build and send emails.

2. Creation of **training materials and documentation** for knowledge sharing with end-users and product owners.

3. Looking at the **future sight** of the solution and understanding where a Marketing Cloud Product Owner can evangelize the solution and a Solution Architect can drive the technology foundation to support growth of Marketing Cloud, while Enablement & Support staff can maintain support materials and deliver training.

People – Roles & Skills (DEA Initial Launch)

Role	Responsibility	Recommended Credentials/Training
Marketing Cloud Administrator / Technical Lead (1)	• Accountable for all activities in owned Business Unit • Collaborate with team to ensure users are trained • Assist with adoption and strategic platform goals in conjunction with business goals • Represent the unit when working with central team to prioritize projects and requests	Marketing Cloud Administrator
Data Manager* (1)	• Coordinate delivery of data and solution integrations with • Marketing Cloud • Manage support queue for data requests • Configuration and maintenance of data architecture	Marketing Cloud Developer
Data Analyst* (2)	• Marketing attribution • Delivery of key performance reporting and analysis to stakeholders • Forecasting all critical KPIs and maintaining forecast • Support users with taxonomy and attribution setup	Marketing Cloud Analytics Training

Email Studio Administrator (2)	• Build and create marketing emails and assets within Marketing Cloud
	• Configuration of audiences for marketing distribution
	• Certified in Marketing Cloud to be able to perform capabilities around
	   o Data Extensions
	   o Journey Builder
		Marketing Cloud Email Specialist

Content Creator (4*)	• Create email templates and importing of marketing assets within Marketing Cloud Content Builder • Ability to edit email content once email has been created	Marketing Cloud Content Builder Training

*Potential net new roles

People – Roles & Skills (MC Growth)

Role	Responsibility	Recommended Credentials/Training
Marketing Cloud Product Owner*	• Prioritize the projects, the resources, and the attention for the platform • Ensure that users stay abreast of changes both to the platform and best practices • Monitor and fine-tune the platform and support structure to remain in alignment with evolving institutional needs and goals • Evangelize platform usefulness to relevant stakeholders • Provide regularly reporting to leadership stakeholders	Marketing Cloud Consultant
Solution Architect*	• Drive technology foundation to support growth of Marketing Cloud • Coordinate delivery of data and tech-based solutions that interface with Marketing Cloud • Develop and maintain platform to solve common business problems • Manage support queue for technical requests • Configuration and maintenance for data architecture • Technical Solution Design - (hand off from functional design to technical implementation) • Can be combined with the Marketing Cloud Administrator Role	Marketing Cloud Consultant
Enablement and Support*	• Document methods on how to use tool for communication and automations • Collaborate with users on how to leverage and document methods • Maintain support materials and deliver training • Monitor and measure adoption • Identify and develop training materials for onboarding and continued learning (new features) • Triage support requests	Marketing Cloud Consultant

*Potential net new roles

Upskilling Existing Staff

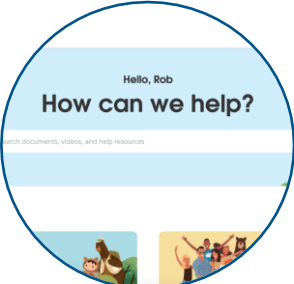Salesforce Certifications

Trailhead

CSG - Customer Success Group

Trailblazer Community

Help.Salesforce.com (Product Docs)

Conferences

Google and YouTube

Salesforce Ben

Marketing Technology

Insights

- There is a desire for personalization capabilities to drive greater constituent experience

- Analytics is a priority, but ability to evaluate performance across channels as well as units, colleges, departments is difficult today

- Interest in a CDP as constituent data specific to Marketing and Communications is decentralized

- Understanding more about which technologies integrate well with Marketing Cloud to enable greater constituent experience

Recommendations

1. Build **core Martech stack around CRM, Marketing Automation, Analytics, CMS and Social Media**. These core pieces should be given priority for adoption across SMU. Broad adoption of these technologies will enable greater brand consistency and increased constituent engagement

2. Immediate need to identify email communications that can be **consolidated under Marketing Cloud**, which will allow sunsetting of email point solutions. Doing so will unify email behavior data to enable greater understanding of constituent engagement across SMU and familiarize staff with Marketing Cloud Platform

3. Most significant **Martech needs are around a multichannel personalization engine, customer data platform and marketing analytics insights.** Consideration should be given as to how these platforms are added in the medium-term (6-12 months)

4. Secondary supporting Martech that integrates with Marketing Cloud will be **key to driving automation** (Form Builder, Digital Asset Management). These should be evaluated in the near-term (3-6 months)

Proposed Core Martech Stack

Initial Launch		Growth Phase			
Marketing Automation	Marketing Cloud	**Project Management / Workflow**	Asana / Monday*	**Digital Asset Management**	Brandfolder or Bynder
CRM	Blackbaud CRM	**Personalization Engine**	Marketing Cloud Personalization	**Social Listening**	Sprout Social
CMS	Sitecore	**CDP**	Salesforce Data Cloud	**Collaboration**	Slack
Analytics	• MC Intelligence Starter (Growth) • G4 • Google Search	**Event Management**	Cvent	**Forms**	Formstack
Social Media Management	Sprout Social	**SMS / MMS**	Marketing Cloud Mobile Studio	**Integration/API**	Zapier

Marketing Technology

At the conclusion of the Marketing Cloud implementation, at a high-level, we will review which of the known systems could be replaced and which could be integrated. Remaining systems should be evaluated for fit with new technology.

RECOMMENDED CONSTITUENT MANAGEMENT SYSTEMS

CORE MARKETING & COMMUNICATION TOOLS

				INVESTIGATING
✅ **Salesforce Marketing Cloud**	✅ **Blackbaud CRM (BBEC)**	Sitecore CMS	✅ SproutSocial	❓ Alumni Portal
SF Pardot	GiveCampus	WordPress	Social Media Channels	❓ Digital Asset Management
🚫 MailChimp	Slate	Unbounce	Video Platform Channels	❓ Customer Data Platform
🚫 Emma	🚫 Hubspot	Gravyty: Grad!Advance	Brandwatch	❓ Personalization
✅ **Cvent**	Gravyty: Grad!Engage	Gravyty: Grad!Raise	Meltwater	
✅ **Paciolan Data**			TV Eyes	

REPORTING TOOLS		PRODUCTIVITY TOOLS	SURVEY/FORM TOOLS	INTEGRATION/ETL TOOLS
✅ **Tableau**	✅ **Google Analytics**	Box	TypeForm	❓ ✅ **Omatic**
Hotjar	✅ **Google Search Console**	Asana	Formidable	✅ Zapier
Moz	✅ **Google Tag Manager**	Monday.com	Forsta	
MC Intelligence - Starter	Mint Measure	Adobe/DAM	Qualtrics	
Crazy Egg	Raising Insight	Slack	❓ ✅ **Formstack**	
WonderChat		❓ ✅ **Brandfolder** or **Bynder**		

🚫 **SYSTEMS TO RETIRE**   ✅ **SYSTEMS TO INTEGRATE**   ❓ **SYSTEMS TO INVESTIGATE**

Roadmap of Marketing Technology

CDP / DataCloud
- Advanced segmentation
- Unified constituent profile

Analytics / Personalization
- Marketing Cloud Intelligence Growth
- Marketing Cloud Personalization

MC Enhancements
- Multi-step Journeys
- MobileConnect

Integrations
- Connecting CRM to build a bi-directional data flow
- Investigating forms, social media and DAM

Marketing Cloud Launch

3 Months

6 Months

9 Months

12 Months

Business Unit Rollout

Insights

- AGAR, Athletics, Cox and Dedman send largest volume of emails to Alumni

- Desire for a shared content calendar amongst the various business units

- Some constituents have strict communication with BBEC approval only – anonymous communication

- Need a test data extension as Marketing cloud does not have a sandbox environment

Recommendations

1. **To protect giving information**, develop two units related to DEA: One specific to Solicitations and Stewardship; the other for Engagement

2. As data sources and assets like email content and calls-to-action may be different from DEA-related communications, create non-DEA Business Units as needed to send other communications (internal comms, recruitment, student success)

3. For enterprise-wide management, create a non-sending Parent Business Unit that administers the overall platform and all other Business Units

4. Marketing Cloud does not have a testing instance, so **utilize an additional Business Unit for Sandbox/Dev/Testing**

Proposed Business Unit Hierarchy at Launch (DEA-specific)

Parent

- Non-sending BU
- Overall Platform Administration

Alumni/Donor Solicitation & Stewardship	Alumni/Donor Engagement	Internal Communications	Sandbox/Dev/Testing
DEA AGAR	DEA AGAR	Central Communications	As needed
DEA Marketing and Comms	DEA Marketing and Comms		
DEA Principal and Major Gifts	DEA Program Services and Donor Relations		
DEA Program Services and Donor Relations	Alumni Relations in Schools and Units		
Alumni Relations In Schools and Units			

*Users can have access to multiple BUs, or just one

Proposed Business Unit Hierarchy Post-Launch (Beyond DEA)

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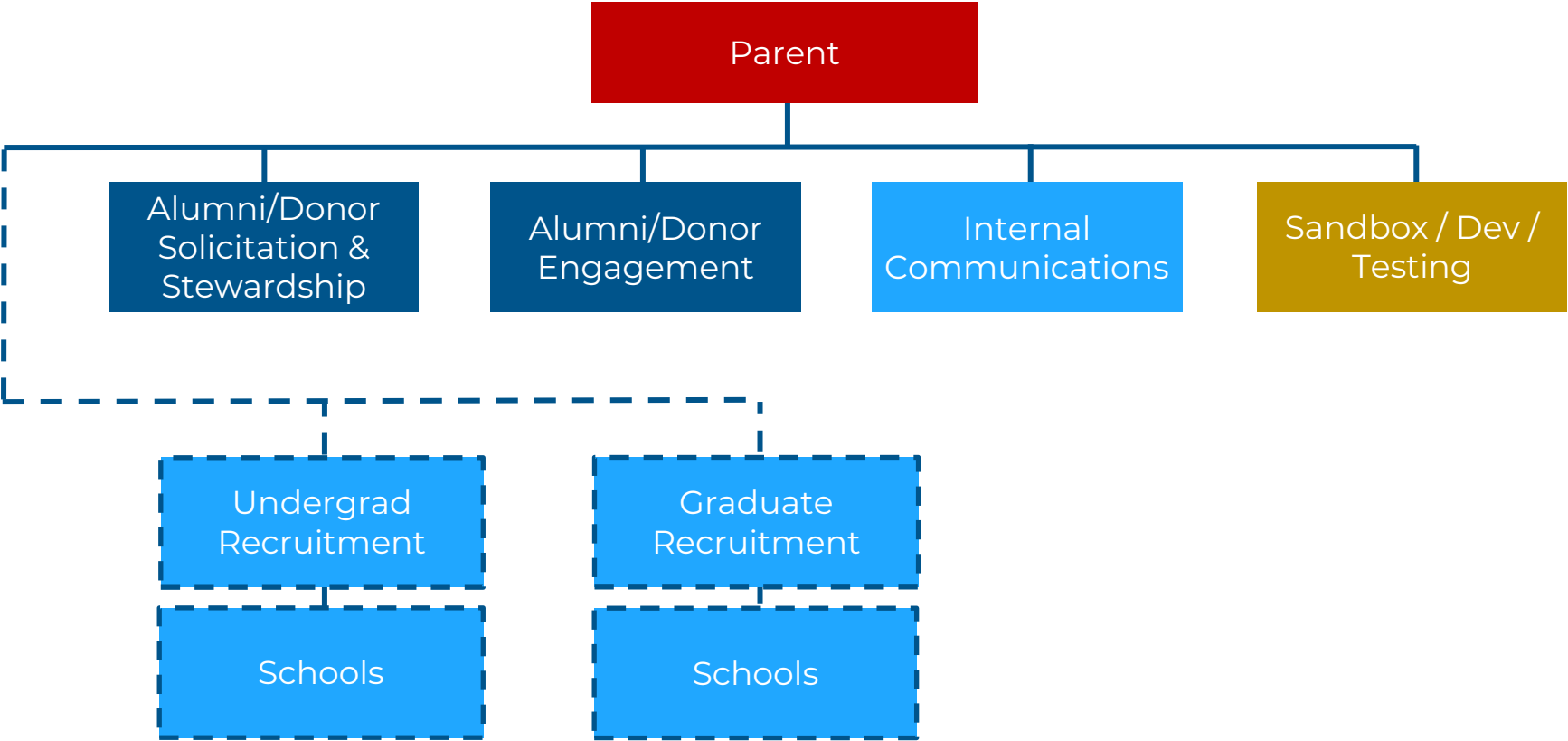
Phased
Roadmap and
Next Steps

Phased Mapping

	2024											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Governance	Committee setup and planning		Data Governance		Center of Excellence Launch		Adoption, Change Management					
Staff / Skills	Central Governance staffing upskill, evaluate hiring needs			DEA User Provisioning		User Training		Ongoing onboarding, training, best practices				
Martech			Integration with CRM, Research Forms, DAM			Multi-step Journeys, Mobile Connect			MC Personalization, MC Intelligence			Data Cloud	
BU Rollout	Initial BUs						Additional BU build out (as needed)					

Change Management

Gaining enterprise-wide adoption will require consistent communication, planning and resourcing, along with providing sufficient incentive for communicators across SMU

	Vision	+	Skills	+	Incentive	+	Resource	+	Action Plan	=	CHANGE	
1	x	+	Skills	+	Incentive	+	Resource	+	Action Plan	=	CONFUSION	1
2	Vision	+	x	+	Incentive	+	Resource	+	Action Plan	=	ANXIETY	2
3	Vision	+	Skills	+	x	+	Resource	+	Action Plan	=	GRADUAL CHANGE	3
4	Vision	+	Skills	+	Incentive	+	x	+	Action Plan	=	FRUSTRATION	4
5	Vision	+	Skills	+	Incentive	+	Resource	+	x	=	FALSE START	5

Project Timeline

PROJECT PHASES	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12	W13	W14	W15	W16	W17	W18	W19	W20	W21	W22	W23	W24
SMU Salesforce Marketing Cloud Strategy & Implementation																								
Program Kickoff																								
Program Strategy																								
Marketing Cloud Implementation																								
Discovery & Solution Design																								
Develop																								
Test																								
Train																								
IP Warming																								
Post Go-Live Support																								

WEEKS

Marketing Cloud Implementation

Overview of the project phases for the Marketing Cloud implementation

SETUP	• Project setup including project planning, project preparation, and Discovery phase planning.
DISCOVERY & REQUIREMENTS	• An evaluation of your current processes, which is done through a thorough analysis of your people (personas), processes, and current systems. • Requirements are gathered during the Discovery sessions and refined in the Requirements Traceability Matrix (RTM) with the goal of aligning both team's understanding of the project scope and ultimately defining the success criteria of the workstream.
DESIGN	• The process of planning, refining, and confirming the solution design based on the approved requirements.
BUILD	• Configuring and implementing the approved solution design into the Salesforce Marketing Cloud (SFMC) environment.
USER ACCEPTANCE TESTING (UAT)	• Ensures proper user acceptance of the functionality and configuration based on the design with the goal of ensuring the system designed can handle business tasks and perform to your specifications for this deployment of Marketing Cloud.
TRAIN THE TRAINER (TTT)	• Instructor-led demonstrations within Marketing Cloud with accompanying materials specific to the functionality covered in the session.
DEPLOY	• Because Marketing Cloud is a PROD instance, deployment (or "go live") is typically understood to be the execution of the IP Warming plan and support as needed from the Huron team.

Thank You