

MARKETING CLOUD EMAIL PLATFORM

Marketing Policy of Use

(July 12, 2022)

BACKGROUND

Marketing Cloud (MC) is an email platform used by the Division of Marketing Communications to design, distribute, measure and automate email marketing campaigns and communications. University Advancement and Undergraduate Enrollment also use Marketing Cloud (MC) for email communications to their target audiences.

The purpose of this document is to provide governance for only Marketing's use of MC as the email platform of choice that best addresses resource and cost factors, and business and operational considerations as outlined in the sections that follow.

CONSIDERATIONS

Marketing will evaluate several factors when considering the use of the MC platform for email communications. In addition to underlining cost/budget and resource considerations, other operational factors as listed below include, but are not limited to, audiences, list usage and management, analysis and subscription requirements and content messaging. Multiple factors may apply when considering the use of MC.

1. Audience
 - a. External vs. Internal Communications
2. Email List Usage
 - a. Custom vs. Multiple Usage
3. Email List Management
 - a. Centralized Ownership by WPI Business Units
 - b. Integration with Other Systems (i.e. salesforce.com)
 - c. Management Requirements (subscriptions, bounce backs, account profiles)
4. Email Purpose
 - a. Commercial vs. Transactional

CRITERIA

As related to each of the operational factors outlined above, the following criteria will be applied by Marketing when evaluating the use of the MC email platform.

1. Audience
 - a. Campaigns and communications to **external audiences** (non WPI email addresses) may be distributed through MC pending applicability of all factors outlined. University-level, commercial based messaging, for example, will be other key factors to consider.
 - i. **MC Example:** University Research Newsletter sent to external audiences
 - b. Communications to **internal audiences** (i.e. students, faculty, staff) will be limited to important community-wide messages, updates and initiatives as

identified by Marketing and senior leadership and are subject to change as necessary and appropriate.

- i. **MC Example:** crisis management, current important initiatives such as the Be Well Together or WPI Campus Update Digests, and COVID/CERT communications

2. Email List Usage

- a. Emails to external lists that are used for multiple university-level communications may be distributed through MC pending applicability of all factors outlined. Email list management, for example, will be another key factor to consider.
 - i. **MC Example:** emails to higher ed list purchased by Marketing and used for several university-level newsletters

3. Email List Management

- a. Emails to contact lists that are centrally managed by Marketing and require subscription maintenance will be distributed through MC. Similar criteria may be applied for contact lists that are centrally managed by other business units with MC instances or that are integrated with SF.com (i.e. alumni list by Advancement, prospective student list by UG Admissions).
 - i. **MC Example:** emails to WPI Journal list for the digital distribution of the publication

4. Email Purpose

- a. Campaigns and communications with **commercial content/messaging** may be distributed through MC pending applicability of all factors outlined.
 - i. **MC Example:** Parents & Friends Newsletter
- b. Campaigns and communications with **transactional content/messaging** that do not require subscription management will not be distributed through MC (unless authorized by senior leadership).
 - i. **MC Example:** Transactional messaging to students to communicate tasks that need to be completed

Note: Select communications from university leadership (i.e. President, Trustees, Provost) may be distributed by Marketing through MC as deemed necessary or authorized by leadership.

EMAIL PRODUCTION SCHEDULE

For email communications to be distributed by Marketing from MC, all supporting information must be received by Marketing no less than two business days prior to the requested distribution date. Information should include account profile (and related email address), approved copy, images and links, list or list criteria, and the email subject line.

RESOURCES

Marketing offers support for select email platforms and provides a variety of tools and self-serve resources for the campus communities' communication needs.

1. Email Platforms

- a. As an alternative to MC, WPI staff and faculty may distribute an email through one of more of the following platforms:
 - i. Outlook (no cost)
 - ii. Mailchimp (no to low cost option pending distribution volume)
 1. Marketing provides templates, ad hoc training, and access to Mailchimp accounts
 2. Request an email account at:
https://wpi.qualtrics.com/jfe/form/SV_eRTFaC1vtwu6sGa
 - iii. Other platforms (cost TBD)
 1. Marketing does not provide support for other email platforms used by staff/faculty members

2. Marketing Resources

Marketing offers a number of tools, templates, and self-serve resources to help the campus community create unified, branded, and targeted communications for various audiences.

Please refer to the Marketing Resources page for additional information:

<https://www.wpi.edu/offices/marketing-communications/resources>