Proposal for governance of marketing automation data

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Summary/Background

UW-Madison is establishing a Marketing Automation Service to provide modern digital marketing, communication, and recruiting capabilities for the purpose of achieving recruitment and/or revenue goals. This service is based on (and limited to) implementation of the Oracle Eloqua marketing automation platform.

What marketing automation offers:

Marketing Automation tool for (one to many) :

- Planning, managing, executing, and reporting on advanced, personalized email marketing campaigns, with tactics executed independently for each contact based on contact behavior
- Sending traditional email blasts
- Personalizing website/landing page/web form content for each contact based on past behavior of that contact

"CRM lite" to (one to one):

- Provide contact-facing staff detailed information on contact's' personal information, marketing experience, preferences, and concerns
- Track one to one engagements with contacts

The units consuming this service in Phase 1 include:

- Continuing Studies, Division of
  - Advance Your Career for-credit programs
  - Noncredit programs
  - Summer Term
  - Visiting International Student Programs
- Pharmacy, School of
  - Noncredit programs
- Engineering, College of
  - Engineering Professional Development
    - Credit programs
    - Noncredit programs
- Enrollment Management, Division of
  - Office of Admissions and Recruitment

Additional units may be invited to use the service under the terms of the Marketing Automation Service Charter.

Scope

The scope of this data governance plan extends only to the scope defined in the Marketing Automation Service Charter. The projected lifespan of this scope is through fiscal year FY 2022 or whenever the scope of the Marketing Automation Service Charter changes substantively. This data governance plan will need to be revised for future scopes.

Plan

The following diagram depicts the data management lifecycle we think about when managing institutional data. We used this diagram as a basis for determining how we would go through the analysis of and formulate the recommendation contained below.

Collect / Create

The following data elements could be collected / created as a part of this plan:

- Bio/demo data for contacts
    - Examples: Contact information, employment history, institutional affiliations
- Internet actions taken by contacts
    - Examples: webpage clicks, email opens, form submissions, social sharing, IP addresses used to retrieve UW information
- Staff correspondence with contacts

    - Examples: phone call, email, chat
- Event registrations for contacts
    - Examples: attend an open house, participate in a webinar
- Survey responses and interest forms for contacts
    - Examples: what surveys a contact received and if they completed

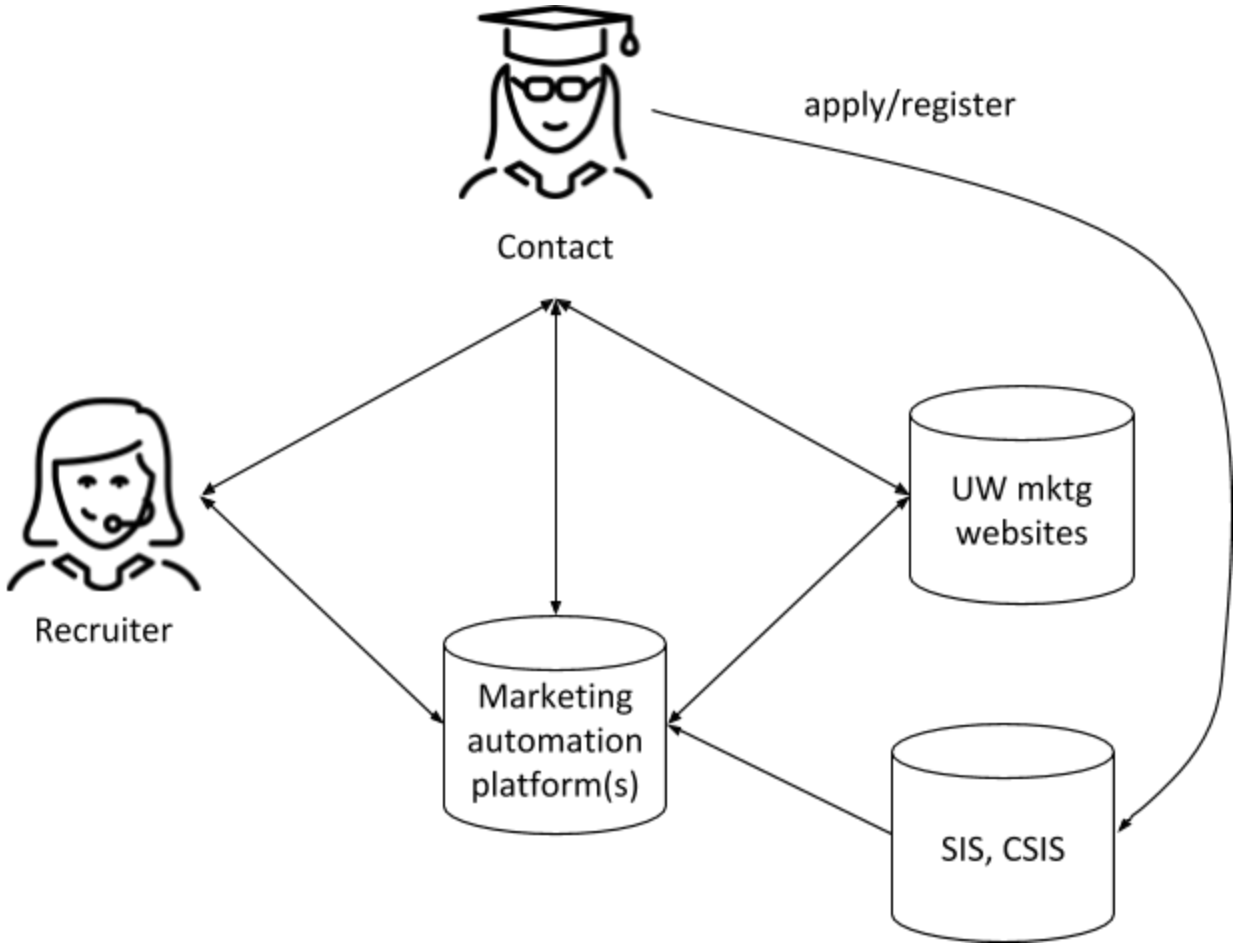
Describe / Document

- Data is gathered directly from contacts using processes designed by UW staff
    - Examples:
        - paper signup sheets at an event are manually entered into a contact record
        - homegrown web forms, Oracle Eloqua web forms, and other digital registrations will automatically be attached to a contact record using email address as unique identifier
        - UW staff correspondence with a contact will be attached to a contact record by:
            - Using Oracle Profiler and Engage tools to automatically update the contact record
            - Staff manually entering into a contact record
    - Personal identity data must not be transmitted via email per UW policy.
- Data is gathered automatically by external vendors and automatically connected to a contact record using email as a unique identifier
    - Examples: Facebook, Oracle Eloqua, iContact, MailChimp

Analyze / Process

Marketing automation data describes the participants in the recruiting/sales process and their actions taken during that process. Since contacts interact with the university in many different ways, that data has many possible entry points, some of them digital and some of them human. The marketing automation service serves as the central repository of that data, resolving data conflicts and duplications, and providing data reporting and analysis to UW staff.

Contacts engage with UW recruiters/prospective student services staff, with UW marketing websites, and directly with marketing-automation platforms (for example, in the Oracle Eloqua platform, via email, landing pages, forms, Oracle Marketing AppCloud partners, etc.). Eventually - or in the case of "silent funnel applicants", even initially - the contact applies or registers for a UW offering. Integration allows Eloqua to tie all this data together. Note that all data flows are two-way except that data in this model flows only from SIS and CSIS into Eloqua, not from Eloqua into SIS and CSIS. Initial integration would all be manual, using spreadsheets, with the goal of true integration within the next couple years.



Application and registration processes and their data remain part of "learner data," separate from "marketing automation data," and are only shared with the marketing automation service for marketing purposes. However, since the recruiting/sales process for any transaction does not end until matriculation or initial participation, and because UW serves large numbers of learners who return again and again for education throughout their lives, some data overlaps both "marketing automation" and "learner or donor" domains.

Publish / Share

Within the stated scope of this plan, the owner of this campus service is the Division of Continuing Studies, specifically the Marketing Automation Manager and the Director of Outreach Technology, who serve as the data stewards. Each business unit must identify a custodian prior to access the marketing automation data.

As Stewards of these pieces of information, the Marketing Automation Manager and the Director of Outreach Technology are responsible for monitoring the quality of the data. Any integration processes that are developed should be fully tested by the Stewards or their designees. The Stewards and Custodians are responsible for ensuring that business processes that transact with or manipulate these data elements are defined and followed accordingly.

The stewards manage data privileges within the marketing-automation service, including the ability to delegate such management privileges to business-unit administrators. UW business units may be delegated authority to manage granular data privileges to their staff. For example, the director of graduate student services within the College of Engineering might determine which of their staff can see:

- What websites were viewed
- Event attendance
- What emails were opened
- Which forms were completed

The custodians have the responsibility to train such administrators on relevant data governance policies specific to marketing automation and those policies specific to imported data such as information from SIS or ABE.

The Stewards and Custodians will expect business justifications for granting access to marketing automation data or for restricting access to that data. When making these decisions, they are obliged to consider appropriate use, policies, and any data governance plans that apply to other kinds of data that may be imported into the marketing automation service.

Who can publish data and which data can be published?

- PII (personally identifiable information) collected or stored for marketing-automation purposes must not be publicly exposed. However, data about an individual person may be exposed back to that same person as content within a marketing message, including via third-party vendors.
- Aggregate or analytical results that do not expose PII may be published.
- Usage metrics will be shared with the Data Stewardship Council annually.

Retain/Destroy

- Data purging will be defined primarily by considerations of data quality, data value for marketing purposes, or logistical factors.
    - Examples:
        - Data quality: invalid email addresses or mailing addresses
        - Data value for marketing purposes: knowing they once clicked on scholarship page 5 years ago, but spent no time on the page
        - Logistical factors: storage or budget limitations
- If other University data retention policies prescribe purging or retention of certain data, those policies will be implemented within the marketing automation service.
- Once the plan is approved, will work with Peg Eusch to define a schedule of evaluation

Definitions

Contact
Prospective, current, or past learner, donor, customer, or participant who has engaged or will engage with UW-Madison in some way.

Learner or donor data/domain
Contact information from other campus information systems such as SIS or ABE. This data has it's own data governance policies that marketing automation users must adhere to but may be available in the marketing automation tool.

Marketing automation data/domain
Contact information collected via marketing efforts as identified in Create/Collect.

Silent funnel/stealth applicants
Learners who apply/register without previously engaging with staff i.e. requesting assistance, additional information, filling out a form, calling, emailing. The first time they identify is when they apply or register.