The Office of Marketing and Communications has established guidelines for Customer Relationship Management (CRM). Violation of these guidelines can lead to suspension of administrative privileges.

Capitol Technology University recognizes the immense opportunity and responsibility in using CRM to connect directly with prospective students, current students, faculty, staff, alumni, parents, partners, donors, media, and community members.

However, without applying the best practices in list maintenance, we will not have the best return on investment (ROI). The use of a CRM can pose risks to our reputation, and our brand. To minimize these risks and ensure the university's assets and resources are used only for approved institutional purposes, we expect all employees to adhere to the rules regarding CRM outlined in this policy.

These guidelines are intended to both assist and inform members of the Capitol Technology University community (e.g. faculty and staff) about available resources and how these resources can be used to promote the university and its mission. This policy does not apply to students, who are governed by Student Life policies.

The Marketing and Communications department understands and appreciates the importance of the Internet in shaping public opinion about our institution, as well as the opinions of our faculty, staff, students, alumni, and partners. In addition, the university recognizes the role faculty and staff can play in helping to shape conversations about the university by interacting via email campaign. The department is committed to supporting all members of our community and their right to interact knowledgeably through email campaigns.

This policy is intended to help guide members of the Capitol Technology University community in making appropriate decisions regarding:

- list management;
- design standards;
- postings on wikis and other interactive sites;
- postings on video or picture sharing sites;
- the comments made as a representative of Capitol Technology University; and
- responding to comments from posters either publicly or via email

The Marketing and Communications department retains the right to monitor, review, and edit all campaign content.

The Goals

This CRM policy was created with the following goals in mind:

1. Encourage a strong sense of community by supporting others and providing information through CRM.

2. Strengthen the university's brand awareness through the use of CRM to promote academics and events.

3. Establish best practices for CRM marketing and email campaigns.

4. Communicate more efficiently and effectively with our diverse and constantly growing audience.

The Guidelines

These guidelines were designed to assist members of the Capitol Technology University community engaging in knowledgeable online interactions. They are also intended to protect the privacy, confidentiality, and interests of Capitol Technology University and our current and potential faculty, staff, and students.

1. Any department or office wishing to have access to the university's CRM must request access from the Marketing and Communications department with the name and contact information for the individual(s) who will be authorized to create, operate, monitor, and send campaigns.

2. Maintain best practices when building and sending email campaigns. These include but are not limited to:
- **Review and test** - Be sure to test your content so you don't send emails with missing data, broken links or template copy.
- **Avoid spammy content** - Spam filters look for certain types of content, so

avoid using all capital letters, too many exclamation points, and gimmicky words or phrases.

- **No excessive punctuation.**
- **For copy-heavy emails, left-align text rather than centering it**
- **Keep varying text colors to a minimum -** Generally use no more than 2 colors per email. One for main body copy and one for call to action(CTA)/emphasis items.
- **Keep text sizing consistent throughout -** Ex: If you make one CTA 24px, the rest of the CTAs should also be 24px.
- **Run copy through a free online spam checker before sending -** If there are too many spam keywords, consider modifying the copy.

3. CRM tools should not be used to post detailed policy, procedural, or internal information.

4. When using images and logos, Capitol Technology University **brand guidelines** must be followed. Faculty and staff are encouraged to use photographs that highlight the beauty of the campus and the diverse student body.

5. Be responsible for content and always exercise good judgment and common sense. Respect the intellectual property of others and the confidentiality of the university and its employees. Write knowledgeably, accurately, and professionally including the use of correct grammar, punctuation, and spelling.

6. Content should not be posted unless it furthers the University's mission. Do not post personal opinions or content that could be construed as placing an individual, organization, or group in a bad or false light.

Consequences

Communications shared via CRM are instantaneous, far-reaching, and forever. Be mindful of the consequences when posting content on behalf of Capitol Technology University and the university community. All campaign communications are subject to confidentiality

and non-disclosure policies enacted by Capitol Technology University regarding private institutional material and content concerning the university and any of its affiliates or employees.

Violations of the CRM Policy will be reported to the Marketing and Communications department, the Human Resources department, and/or the IT department.

The Marketing and Communications department reserves the right to monitor campaign content related to the institution and address (i.e. delete, change, etc.) content it finds invalid, objectionable, repetitive, or irrelevant to the Capitol Technology University community.

Questions regarding the CRM policy and reports of misuse or violation of this policy can be addressed to the *Office of Marketing and Communications*, at **marketing@captechu.edu.**