UBC Mailing List Replacement Project

Feedback Summary – Survey & Focus Groups

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I. Survey Results

- 378 responses were collected from October 25, 2013 until December 18, 2013
- Surveys were sent to 800+ current MajorDomo users, as well as Business and Technical representatives, Communication Cardinals, and Faculty Communication Staff

Key findings

- The top 3 mailing list requirements were as follows:
    - A web interface for list owners
    - HTML/Rich Messages
    - The ability to populate or import a set of mailing addresses
- The current Majordomo service offering is confusing and hard to use, survey participants stressed that the new service should be user-friendly and easily accessible
- Some participants seemed interested in finding a mailing list service to be used for marketing purposes, similar to MailChimp and Industry Mailout
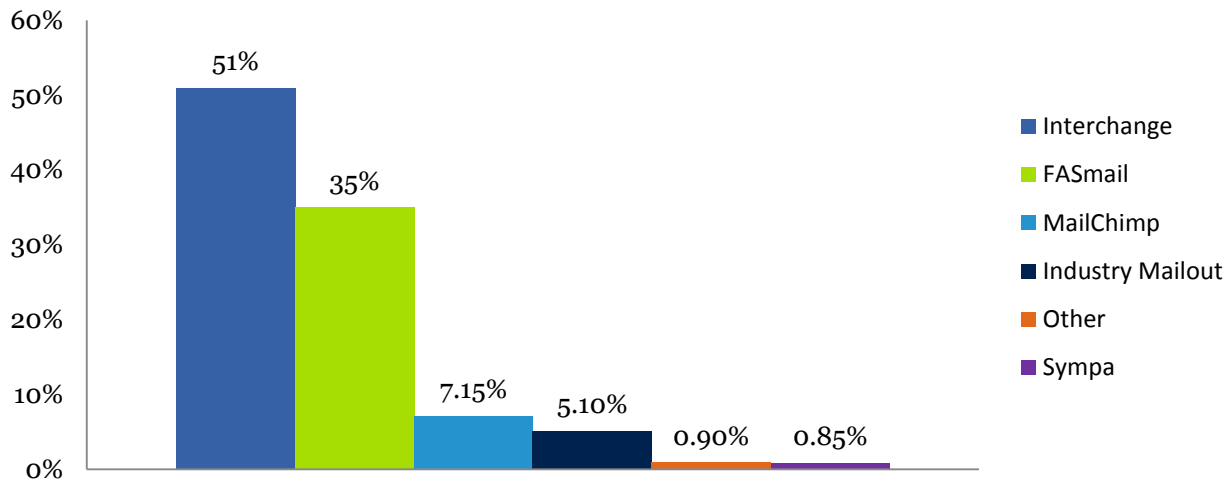
Demographics

- Staff and faculty members were the two largest groups of participants with 85% and 13%

Mailing list services currently in use
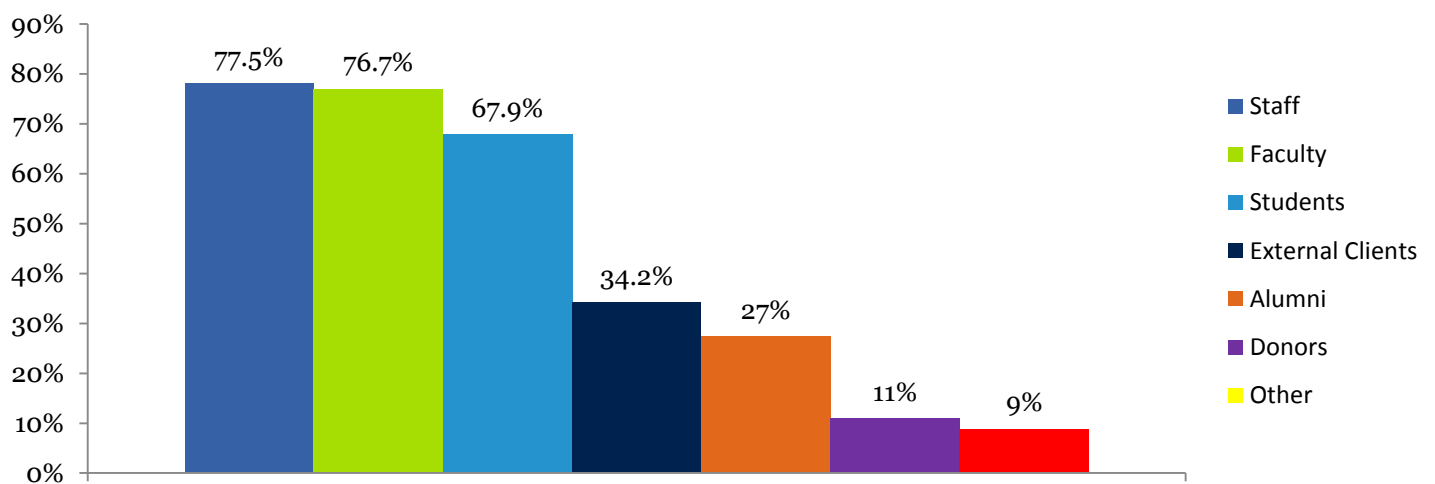
- Interchange (MajorDomo) and FASmail were the two most used mailing list services with 51% and 35%

- Other mailing list services being used include: Emma, Engaging Networks, Constant Contact, Mailman, Gmail, Google Groups, Manual lists, and through Outlook
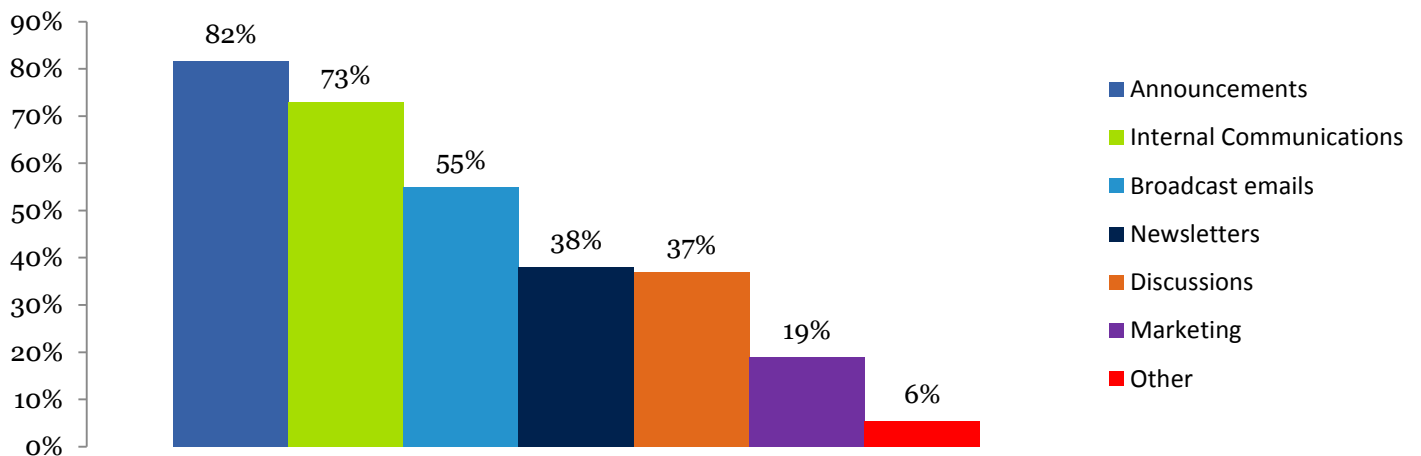
Mailing list usage

- The mailing list audience typically consisted of staff (77.5%), faculty (76.7%), and students (67.9%):

- Other mailing list audiences include:

  o Internal emails

  o External partners

  o Potential students

  o Members, on-air programmers/djs, volunteers, music promoters, other campus radio stations, record labels, bands, general public interested in CiTR's weekly charts

- Mailing lists are typically used for announcements (82%), followed by internal communications (73%) and broadcast emails (55%):


- Other uses for mailing lists include:

  o Administrative information and reminders to grad students/advisors

  o Monitoring core services

  o Workflows (ie. Passing along instructions on work to be done)

  o Student interactions, admission inquiry from around the world

  o Recruitment

Top mailing list requirements

- When asked to list the top requirements for a replacement mailing list service, participants chose a web interface (37%), the ability to import email addresses (18%), and HTML/Rich Messages (17%):
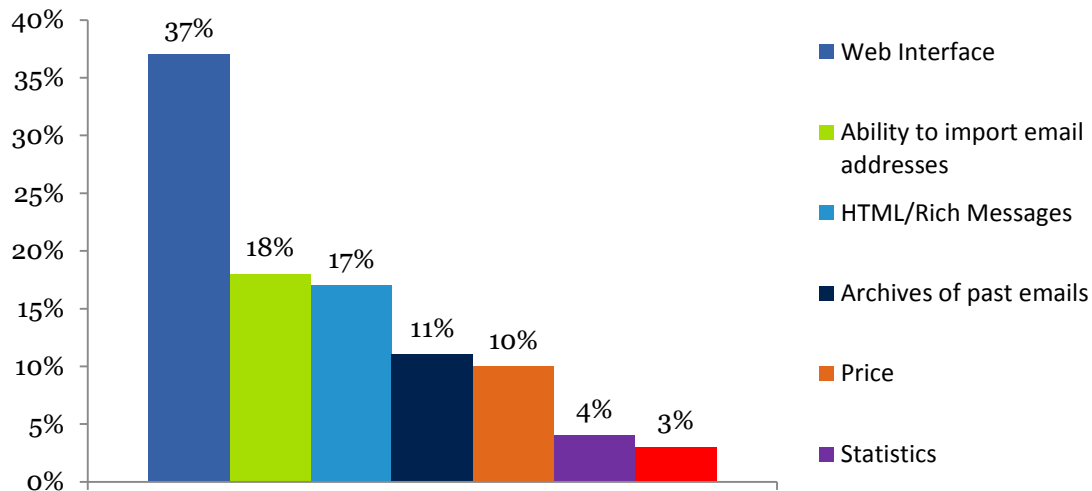
Web interface

- 91% of participants thought it was important that mailing list owners should be able to access a web interface

  o Their comments concluded that a web interface will be user-friendly, and would help with lists managed by multiple users as well as for users that manage multiple lists
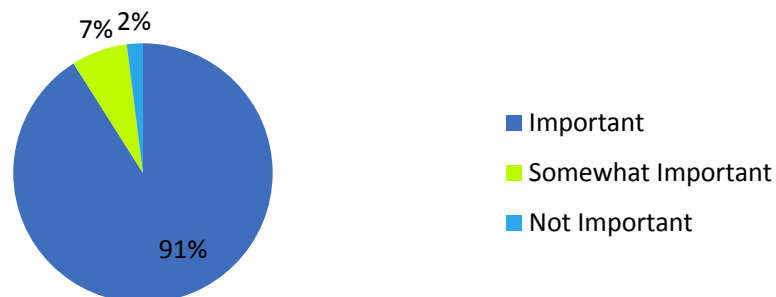
- 79% of survey participants agreed that it is also important to have a web interface for mailing list moderators
    - One participant highlighted that the lack of web access has been an issue during times of vacation/absences, as well as when lists no longer have an owner at UBC

Ability to import email addresses

- 65% of participants thought that the ability to populate or import a set of mailing addresses from another data source was important
- Top reasons for wanting the ability to import email addresses:
    - "Being able to upload a .csv file would be especially useful"
    - "Would save a lot of time"
    - "Would be useful to regularly update email addresses from HRMS and other sources"
- This requirement raises the question of who would be able to pull email addresses from certain data sources, which could lead to security and privacy issues
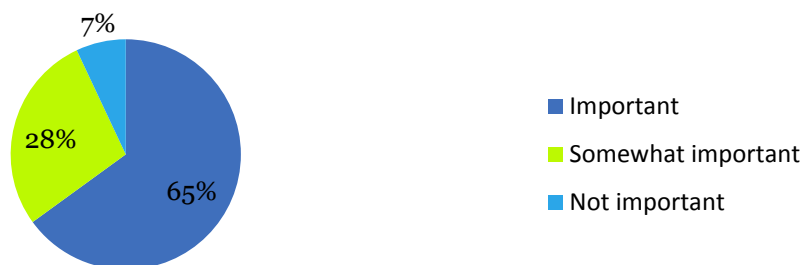
HTML/rich text messages

- 60% of participants thought that the new mailing list service should support HTML/Rich Messages
- Because of UBC's branding guidelines, having the capability to create HTML/Rich Messages would support the UBC HTML email template, which is used quite extensively

Legend:
- ■ Important — 60%
- ■ Somewhat Important — 31%
- ■ Not Important — 9%

All past emails should be archived

- Only 51% of survey participants wanted past emails to be saved in a searchable archive.
- Comments for this option highlighted the potential privacy problems that may occur due to saving past emails for a lengthy amount of time

Legend:
- ■ Important — 51%
- ■ Somewhat Important — 33%
- ■ Not Important — 16%

Pricing

- Pricing was important for 63% of participants
- Comments included:
    - "The cost for this should be absolutely minimal, given that there are an abundance of similar services available to people on the web"
    - "If we're to use a central service it should absolutely be funded centrally. If it's optional, then a chargeback method might be acceptable."
    - "Definitely need an affordable campus wide solution"

Legend:
- ■ Important
- ■ Somewhat Important
- ■ Not Important

Values shown: 8%, 29%, 63%

Additional comments

- "It is essential that we can include any email addresses in the mailing list (ie, external email addresses)"
- "Privacy needs to be ensured. Hosting on a Canadian server to meet provincial legislation is necessary."
- "It would be nice to able to use it for marketing purposes as well. This would mean support for embedded sign up on a website, HTML support, advance tracking of clicks/opens, and management of invalid emails/bounce backs. Comparable features offered by MailChimp.com would be ideal"
- "I'd be in favor of keeping it as simple as possible - partly for price and partly to minimize tech problems"
- "The ability to customize welcome/subscription message and easily embed subscription option into a website would be great"
- "Ease of list transfer to a new owner, or if it's possible for a list to have multiple owners"

II. Focus Groups

Summary

- Four focus group sessions were conducted for business and technical representatives from departments across UBC
- A total of 21 people attended representing Applied Sciences, the Faculty of Medicine (MedIT), Library Services, Arts, Sauder School of Business, Student Communications Services, Education, Science, Forestry, Law, Land and Food Systems, Development & Alumni Engagement, Information Technology, Public Affairs, and Human Resources

1) Business Representative Focus Groups

- Three focus groups were held for business representatives, with a total of 13 participants
- Participants represented Applied Sciences, the Faculty of Medicine (MedIT), Library, Faculty of Arts, Sauder School of Business, Student Communications Services, Development & Alumni Engagement, Information Technology, Public Affairs, and Human Resources

Current mailing list services

- All participants have used or are still using MajorDomo, but they were also using a variety of other mailing list services including: Sympa, Industry Mailout, FASmail (plain text email), and MailChimp

Requirements

- Statistics would be very useful to determine who reviewed an email and what was clicked on
- Automation in managing mailing lists is very important. Too much time is spent on managing the subscriber base
- Lifecycle of mailing lists: What happens when the owner moves on? How easy is it to transfer ownership
- Subscribers should be able to determine the method of content delivery (e.g. email, twitter, text messages, digests)
- Records management (archiving) – disposition of documents, an audit trail for emails
- Being able to email external users outside of FASmail is important

Additional Comments

- "Current mailing lists lack man power, having a centralized management of the mailing list service would be much better"
- "Maybe we should be considering looking for a system different from just mailing lists – if we rethink our plan, maybe people will want/need a different system"
- "Is MajorDomo only widely used because we don't have anything else, and is it effective?"

2) Technical Representative Focus Groups

- One focus group was held for technical representatives, with a total of 8 participants
- Participants represented the faculty of Education, Science, Forestry, Law, Land and Food Systems, Devolopment & Alumni Engagement, and Information Technology

Current mailing list services

- All participants have used or are still using MajorDomo, but they were also using a variety of other mailing list services including: Sympa and Mailman

Requirements

- Encryption of some sort – some departments need to send out reports and other private information that needs to stay safe and can't be forwarded on
- Tracking information would be interesting, but some users/clients may be concerned out about this.
- List creation needs to be very easy and approval should be very short
- Would be great to have hierarchical lists to manage information

Additional Comments

- "Important to distinguish between marketing vs. non-marketing needs"
- "There needs to be as much ability to self-serve as possible"
- "Would be good to be able to audit the list – how could we keep lists clean, what tools would be available?"

INFORMATION TECHNOLOGY

Appendix A – Survey Questions

Email Mailing List Criteria Survey

UBC IT is planning to replace the current Interchange Mailing List Service (also known as Majordomo) due to a lack of vendor support.

In order to select a new solution that will satisfy the requirements from users across campus, we ask that you please rank each criteria listed below based on your department's mailing list needs.

Your input is very important to us. If you respond within one week of receiving this survey, you will be entered to win a $50 gift certificate to a retail location of *your choice*!

Criteria:

1) Mailing list owners should be able to access a web interface (eg. a place to go online to add lists, manage subscribers, set permissions, etc.)

○ Important

○ Somewhat Important

○ Not Important

Additional comments

_____

2) Mailing List moderators should also be able to access a web interface (eg. a place to go online to easily add/remove messages and subscribers, approve/reject postings, etc.)

○ Important

○ Somewhat Important

○ Not Important

Additional comments

_____

3) Mailing list subscribers should be able to manage their subscription settings using a web interface. (eg. unsubscribe from mailing lists, see which mailing lists they are subscribed to, etc.)

- ◯ Important
- ◯ Somewhat Important
- ◯ Not Important

Additional comments

_____

4) The mailing list service should support HTML / Rich messages (eg. the ability to add images, HTML codes, customized footers, headers, and templates)

- ◯ Important
- ◯ Somewhat Important
- ◯ Not Important

Additional comments

_____

5) You should be able to populate or import a set of mailing addresses from another data source

- ◯ Important
- ◯ Somewhat Important
- ◯ Not Important

Additional comments

_____

6) All past emails sent out should be archivable and searchable

- ◯ Important
- ◯ Somewhat Important
- ◯ Not Important

Additional comments

_____

7) The mailing list service should be centrally funded

◯ Important

◯ Somewhat Important

◯ Not Important

Additional comments

_____

8) Which (if any) mail delivery statistics are important to you? (select all that apply)

❑ Number of undelivered emails

❑ Number of times the email was read

❑ Number of links clicked

❑ Number of times email was forwarded

❑ Historical details of emails sent over a time period (e.g. number of opened e-mails in a month, number of bounced e-mails in a week, etc.)

❑ Generation of graphical reports from analytics data

❑ Other (please specify)

If you selected other, please specify

_____

9) In your opinion, what are the top 3 mailing list requirements?

Web Interface _____

HTML / Rich Messages _____

Ability to import email addresses _____

Archives of past emails _____

Price _____

Statistics _____

Ability to make templates   _____

10) Who is your mailing list audience? (select all that apply)

❑ Staff

❑ Faculty

❑ Students

❑ Alumni

❑ Donors

❑ External Clients

❑ Other (please specify)

If you selected other, please specify

_____

11) What do you use your mailing lists for? (select all that apply)

❑ Marketing

❑ Announcements

❑ Broadcast Emails

❑ Discussions

❑ Newsletters

❑ Internal Communications

❑ Other (please specify)

If you selected other, please specify

_____

12) Do you have any additional criteria that you would want from an enterprise mailing list service?

_____

_____

_____

13) Please select any or all mailing list products that you currently use

❑ Interchange Mailing List Service (Majordomo)

❑ FASmail

❑ Sympa

❑ Industry Mailout

❑ MailChimp

❑ Other (please specify)

If you selected other, please specify

_____

14) If you respond within one week of receiving this survey, you will be entered to win a $50 gift certificate to a retail location of your choice! Please enter your information below to enter:

Name: _____

Email Address: _____

Department: _____

Role: _____

Appendix B – Focus Group Agenda

1. Introductions
    a. Technical members present and in other sessions
    b. Business reps in other sessions
    c. Project Team
2. Mailing List landscape at UBC
3. Project Objectives
4. Review criteria for EMLS products
    a. The purpose for mailing lists (one way, collaboration)
    b. Sources of record (SOR) - how do you create your membership lists (adhoc, built / refreshed from a SOR)
    c. Top features from leading EMSL products
    d. How to gather further requirements and rank them for importance
5. Project timeline and next steps