Standards for Program Creation

Executive Programs uses Salesforce (with Pardot) and Event Reg to manage their programs.

Information on Standards for Executive Programs

When creating a new program:

Program information created in Salesforce will port into Event Reg, ensuring the naming conventions are followed properly, and all other information is as up-to-date as possible. This allows for Program Managers to plan their programs effectively, and for reports to be consistent and correct.

When Creating Programs in Salesforce - Please use the following Naming Conventions:

<table>
<thead>
<tr>
<th>Program Type</th>
<th>Naming Convention</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Enrollment</td>
<td>Full Program Name, Month Year</td>
<td>Behavioral Economics Immersion, November 2017</td>
</tr>
<tr>
<td>Custom program that repeats</td>
<td>Full Name, Month Year</td>
<td>BearingPoint Senior Managers, October 2015</td>
</tr>
<tr>
<td>Custom program with Modules and set participant list</td>
<td>Full Name, Year Range</td>
<td>Yale Medicine Group, Emerging Leaders Program, 2015-2016</td>
</tr>
<tr>
<td>Custom program with Modules and varied participant list</td>
<td>Full Name, Year Range, Module #</td>
<td>Yale Global Executive Leadership Program, 2015-2016, Module 1</td>
</tr>
</tbody>
</table>

Short Program Acronyms

When setting up the Short program name for a program, please use the acronym for the program followed by two digit month, and four digit year. For example: WLP 022019. Acronyms in use today are:

- WLP
- BEI
- NSOM
- WOB
- YGELP
- YPC
- BEI
- CIMA
- CEBG
- CPWA
Related articles

- Program Creation Process
- Marketing, Sales and Program Management
- Creating Programs for Registrations that go through Salesforce
- Standards for Program Creation
- Editing multiple records in Salesforce