



TEACHER'S  
PENSION

# Success for Teachers Pension IN THE Salesforce Clouds

Learn what makes Cloudy in California's approach unique, flexible and based on results.

## Client Experience

Cloudy in California helps Teachers Pension & Insurance re-envision and engineer an end-to-end Salesforce.com deployment.

## About Teachers Pension

The executive team wished to create a platform that inherently drove volumes of transactions through workflow orchestration, data driven decisions and multiple integrations. Cloudy in California's approach, expertise and transparency aligned perfectly with Teachers Pension objectives. Over the past 24 months Cloudy and Teachers Pension have forged a powerful and collaborative relationship.

## Managed Transactions

- 500 + Special Events Annually
- Call Center Operations
- Electronic Policy Submission

## Top of Mind



### Scale

Numerous departments, responsibilities and focus



### Control

Provide a focused but flexible path for each user



### Accountability

Analytics and alerts keep the team driving to a common goal



Cloudy in California



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Wyoming, Washington,  
Nevada, California

## Business challenge

Through exponential growth in policies, personnel, and geography forced Teachers Pension to experience fragmented business processes with a range of disparate systems across their organization. To re-gain control, insight, and provide excellent customer service Teachers Pension decided to connect all of their efforts into one platform.

Teachers Pension CEO Erik Neville, and his team committed to an organization wide initiative to drive:

- Cross department collaboration
- Data driven task assignment
- Top of funnel
- Opportunity management
- Forecasting
- Partner access
- Limit typographical and structural policy errors

One of the challenges was that Teachers Pension had already deployed Salesforce, with the help of a consultancy that really didn't deliver what the organization dreamed of.

It was clear that Teachers Pension & Insurance had some serious goals and they entrusted Paul Tunison and his team at Cloudy in California to clear things up (pun intended).

## The dream delivered

This was the single largest investment made by Teachers Pension, aside from the acquisition of real estate, so it was very important to get right.

Cloudy embedded some of its team in the Teachers Pension corporate office, for months. This time was spent identifying processes, expectations and mapping out what the future should encompass on the Salesforce cloud for them.

Rolling out enhancements on 90 day intervals proved to be powerful for the team at Teachers. This allowed the team to get the tools they needed quickly, enhance them, and touch new parts of the organization. Within 10 months, the entire Salesforce deployment/data model was complete across all departments.

This redesign and relaunch provides quantifiable enrichments to staff, partners and executives at Teachers Pension & Insurance.

Cloudy's efforts have unlocked data, reports, dashboards, user flows and engrained accountability at all levels. KPI's come naturally as the custom Salesforce design, fully reflects the true business model that Teachers Pension has.

### Deployed Technologies

- ✓ Salesforce Sales Cloud Lightning
- ✓ Salesforce Service Cloud
- ✓ Salesforce Marketing Cloud
- ✓ Salesforce Communities
- ✓ Office 365
- ✓ 8x8 VOIP (Integrated Phone Service)



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