

United States Military Academy at West Point – Summer Leaders Experience

Moving to a near-paperless recruiting and attendee management system

COMPANY OVERVIEW

The United States Military Academy at West Point (USMA) is a well known institution with a mission "To educate, train, and inspire the Corps of Cadets so that each graduate is a commissioned leader of character committed to the values of Duty, Honor, Country and prepared for a career of professional excellence and service to the Nation as an officer in the United States Army." HigherEchelon's objective was to enhance and automate multiple processes related to the Academy's summer leader experience (SLE) program administration through the implementation of Salesforce Service Cloud, Government Cloud, Communities, and Marketing Cloud.

COMPANY PROFILE

LOCATION	<i>West Point, NY</i>
EMPLOYEES	<i>6000</i>
INDUSTRY	<i>Higher Education</i>
COMPETITOR	<i>In-house systems, paper</i>
SOLUTION(S)	<i>Community Cloud, Service Cloud</i>
GO LIVE DATE:	<i>02/22/2018</i>



CHALLENGE

- The SLE registration process was a highly manual, paper-based process for the selection, registration, and ongoing management of participant information.
- Capabilities to automate or manage communication, or collaborate with participants did not exist.
- Payment for the SLE program was submitted via a mailed check or money order.
- There are typically between 4,500 and 5,000 applicants for 1,100 positions.

SOLUTION

- Leverage Salesforce Community Cloud and Service Cloud, within the Government Cloud, to implement an SLE participant solution that is nearly paperless.
- Provide online registration and supporting documentation upload capability through the use of person accounts, custom objects and creation of a customer community.
- Enable AppExchange App "S-Docs" to electronically capture and transmit critical information via PDF
- Leverage Chatter capabilities within Community to securely pass documents between participants and USMA personnel.
- Enable AppExchange App "Chargent" capability for direct online payment and integrating USMA with online payment gateway provider, PayPal.
- Implement FAQ capabilities within Community for participants.
- Implement Cases to track and resolve participant issues.

RESULTS

- An online portal with automated processes capable of supporting 6,000 applicants and 1,100 participants while significantly streamlining the existing paper-based process.
- Automated provisioning of the participant to the online community.
- Online payment capabilities via "Chargent" replacing the previous check / money order payment method.
- A trackable feedback loop allowing USMA personnel to quantify common issues for feature enhancements.
- Electronic capture and maintenance of critical documents via "S-Docs".
- Automated email communications with participants.
- Online community for USMA personnel to post FAQs.

More Detailed Info and Quantitative Results



[Color Commentary and Notes About Details of Deal or Implementation]

NOTES

- Prior to the advent of this solution, USMA was creating a manual manila folder for each participants. Each folder could have up to 30 pieces of paper in them, and there were 1100 participants.

QUANTITATIVE RESULTS

- 1,100 users deployed on Community Cloud.
- Eliminated the generation of 5,500 paper forms per year.
- Saved \$1,650 in annual postage costs to participants.
- Generated an average annual savings of \$3,300 in money order expenses to participants.
- 50% reduction in processing time for participant application by USMA personnel.
- 60% reduction in processing time for participant Medical Questionnaire and Power or Attorney forms by USMA personnel.
- 300+ Cases generated and resolved since go-live.
- 99.6% reduction in Case resolution timing vs. previous paper-based system.
- Generated 24 hrs. in labor cost savings to USMA.
- Eliminated historical paper file storage need of 1 file box per year for 6 years.



Solution Detail



MORE DETAILS

Competitors of Salesforce engaged in sales cycle:	<i>No competitor identified</i>
Previous technology replaced by Salesforce:	<i>Paper-based system, payments collected via money orders</i>
Salesforce products deployed:	<i>Service Cloud, Community Cloud, Marketing Cloud</i>
Customer Business Model (B2B, B2C, or Both)	<i>B2C</i>
Salesforce Product features:	<i>Service Cloud:</i> Case Management, B to C <i>Community Cloud:</i> Customer Community – Self Service (B to C), Lightning Community Deployment, Customer Community – User Group/Advisory Council, Chatter (process collaboration) <i>Platform:</i> Custom App Dev (Lightning and Javascript, Reporting against custom data)
If using Service Cloud, list use case (e.g. customer support, call center, field service, telesales, etc.)	<i>Allow community members to complete their program registration checklist, submit forms using Chatter, add credit cards and process their registration payments, submit questions as Cases and review FAQs</i>
Integrations:	<i>Home-grown, SQL-based Academy Management System</i>
AppExchange Apps/Partners	<i>S-Docs, Chargent</i>
Solution 'Go Live' date:	<i>02/22/2018</i>



Screenshots of app



A screenshot of a Salesforce Registration Checklist page. The page shows a list of participants with their status, and a detailed view of a participant's checklist items. The status is "Accepted".

Participant	Status
[Redacted]	Accepted

Participant	Status
[Redacted]	Accepted

System Information

- Registration Checklist

A screenshot of the West Point Summer Leaders Experience Registration Site. The page features the West Point logo, a navigation menu, and a large banner image of a group of cadets in front of a building. The text reads "Welcome to the West Point Summer Leaders Experience Registration Site" and "West Point Admissions CANDIDATES".

UNITED STATES MILITARY ACADEMY WEST POINT®

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Welcome to the West Point Summer Leaders Experience Registration Site


West Point Admissions CANDIDATES

DUTY · HONOR · COUNTRY UNITED STATES MILITARY ACADEMY



Screenshots of app




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PRIVACY ACT STATEMENT – HEALTH CARE RECORDS

This form is not a consent to release or use health care information

1) AUTHORITY FOR COLLECTION OF INFORMATION INCLUDING SOCIAL SECURITY NUMBER (SSN) Sections 133, 1071-87, 3012, 5031 and 8012, Title 10, United States Code and Executive Order 9397.

2) PRINCIPAL PURPOSES FOR WHICH INFORMATION IS INTENDED TO BE USED This form provides you the advice required by The Privacy Act of 1974. The personal information will facilitate and document your health care. The Social Security Number (SSN) of member or sponsor is required to identify and receive health care records.

3) ROUTINE USES The primary use of this information is to provide, plan and coordinate health care. As prior to enactment of the Privacy Act, other possible uses are to: Aid in preventive health and communicable disease control programs and report medical conditions required by law to federal, state and local agencies; compile statistical data; conduct research; reach; determine suitability of persons for service or assignments; adjudicate claims and determine benefits; other lawful purposes, including law enforcement and litigation; conduct authorized investigations; evaluate care rendered; determine professional certification and hospital accreditation; provide physical qualification of patients to agencies of federal, state, or local government upon request in the pursuit of their official duties.

4) WHETHER DISCLOSURE IS MANDATORY OR VOLUNTARY AND EFFECT ON INDIVIDUAL IF NOT PROVIDING INFORMATION. In the case of military personnel, the requested information is mandatory because of the need to document all active duty medical incidents in view of future rights and benefits. In the case of all other personnel/beneficiaries, the requested information is voluntary. If the requested information is not furnished, comprehensive health care may not be possible, but CARE WILL NOT BE DENIED. This all-inclusive Privacy Act Statement will apply to all requests for personal information made by health care treatment personnel or for medical/dental treatment purposes and will become a permanent part of your health care record. Your signature merely acknowledges that you have been advised of the foregoing. If requested, a copy of this form will be furnished to you.

Acknowledgement and Signature
 Select the Acknowledgement checkbox and add your Parent/Guardian Signature to complete the Privacy Act step.

Acknowledgement


Signature of Parent/Guardian _____ Signature Date
 Feb 27, 2018

EMI INOUE SOLDWEDEL's Registration Checklist

USMA ID/C Number	C19120617
Registration Checklist	Accepted
Medical Questionnaire	Complete
Privacy Act	Complete
Release from Liability	Complete
Photo and Video Authorization	Complete
Power of Attorney	Complete
Travel Info	
Payment	Complete

Privacy Act Instructions

- Carefully review the form and its contents
- Acknowledge you have reviewed the form by selecting the "Acknowledgment" checkbox
- A parent/guardian will type their name in the "Signature of Parent/Guardian" field
- Select today's date for the "Signature Date" field
- Click "Save Record"


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Charge Order

[Charge](#)

USMA PARTICIPANT PAYMENT

PAYMENT INFORMATION

Card Number	Status
Card Expiration Month	Complete
Card Expiration Year	Subtotal
Billing Address	Billing Address
Billing First Name	Billing Address Line 2
Billing Email	Billing City
	Billing State
	Alaska
	Billing Zip/Postal
	Billing Country
	United States

EMI SOLDWEDEL's Registration Checklist

USMA ID/C Number	C19120617
Registration Checklist	Accepted
Medical Questionnaire	Complete
Privacy Act	Complete
Release from Liability	Complete
Photo and Video Authorization	Complete
Power of Attorney	Complete
Travel Info	
Payment	Complete

Payment Instructions

- Payment for the SLC program can be submitted at any point during the registration process
- Complete the "Payment Information" and "Billing Information" sections
- Click "Save" when all information has been input (NOTE your credit card will not be charged at this point)
- The final step to submit payment is to click "Charge" in the upper right corner (This will initiate a charge to your credit card)

Transactions (1)

DATE/TIME	TRANSACTION	TYPE	AMOUNT
3/30/20...	Charge		

[View All](#)



Screenshots of app



SCREENSHOT / DEMO

▪A full demonstration video can be viewed using the below link:

▪<https://www.useloom.com/share/6c2d9315e0c1407b905c648d5a19461a>



Sharing Guidelines



These questions are required in order for your story submission to be accepted. Please answer these questions to the best of your ability.

We will not contact the customer without reaching out to you first.

SHARING USE CASE/SCENARIO:

Can Salesforce AEs share this story and overview slide in sales settings?	Y
Can Salesforce AEs mention the customer name in sales settings?	Y
Is this customer willing to act as a reference customer for prospects?	Y
Would the customer be willing to speak at Dreamforce or other events?	N

PARTNER INFORMATION

Name of reference approver:	Tim Pash
Title of reference approver:	SVP Salesforce and IT Services
Email of reference approver:	Tim.pash@higherechelon.com

