

United States Military Academy at West Point – Summer Leaders Experience Phase II

HEDA migration & phase II enhancements of 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 migrate the existing Salesforce org to the higher education data architecture (HEDA) model then further enhance and automate multiple processes related to the Academy's Summer Leader Experience (SLE) program administration previously built during phase I.

COMPANY PROFILE

| | |
|---------------|---|
| LOCATION | West Point, NY |
| EMPLOYEES | 6000 |
| INDUSTRY | Higher Education |
| COMPETITOR | In-house systems, paper |
| SOLUTION(S) | Community Cloud, Service Cloud, Government Cloud, Chatter |
| GO LIVE DATE: | 01/15/2019 |



CHALLENGE

- In phase I, the SLE program registration was migrated to Salesforce eliminating a highly manual, paper-based process for the selection, registration, and ongoing management of participant information.
- Phase II required expanded functionality to incorporate the full program application and offer extension process.
- Applicants are required to provide personal data, determine the SLE session preference and rank 16 program workshops.
- Integration of 4,500 to 5,000 SLE applicant records from in-house admissions data base each year.
- USMA administrators manually evaluated the applicant data pool and extended offers for 1,200 SLE candidates.
- Assign 1,200 SLE participants to platoons, squads, rooms and workshops.
- Migration of existing org to the HEDA data was needed for long-term flexibility of use.
- Capabilities to automate or manage communication, or collaborate with candidates did not exist.

SOLUTION

- Leverage Salesforce Community Cloud and Service Cloud, within the Government Cloud, to implement nearly paperless SLE program application solution.
- Provide online application and automated offer extension capabilities through the use of HEDA, custom objects and a customer Community.
- Leverage Lightning Components and Visual Flow to create custom Community page layouts for flexible ranking of SLE candidate workshop preferences.
- Leverage Visual Flow to assign platoons, squads, rooms and workshops.
- Use custom objects, list views, dashboards, and Process Builder to provide real-time applicant evaluation data and offer extension capabilities.
- Establish integration with in-house admissions database to refresh candidate data hourly via Data Loader
- Implement FAQ capabilities within Community for SLE candidates.
- Implement Cases to track and resolve SLE candidate issues.

Salesforce Confidential

RESULTS

- An online portal with automated processes capable of supporting the entire SLE program life cycle for 5,000 applicants and 1,200 SLE candidates while significantly streamlining the existing paper-based process.
- Migration of 1,100 existing candidate records to the HEDA data model.
- External integration with Microsoft Access entry point for hourly refresh of SLE candidate data from in-house admissions database.
- Automated provisioning of applicants to the online community.
- Real-time applicant evaluation data analytics and automate offer extensions capabilities.
- A trackable feedback loop allowing USMA personnel to quantify common issues for feature enhancements.
- 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 implementation of this solution, USMA was manually evaluating up to 5,000 SLE program applicants via database exports and Microsoft Excel annually. Program offers for 1,200 candidates were extended and tracked via manual methods. Evaluation of program participant data year over year was disparate and time consuming to review.
- *“Overall, I was very satisfied with the project. It has made the SLE process much more efficient for my staff and I. The Higher echelon team was always accessible and quickly worked to address any issues.” – LTC Rance Lee*

QUANTITATIVE RESULTS

- 3,100 users deployed on Community Cloud.
- 80% reduction in processing and analysis time of application evaluation by USMA personnel. Resulting in 117 hrs. of cumulative time savings.
- Estimated 90% reduction in processing time room and name badge assignments by USMA personnel. Resulting in 16 hrs. of cumulative time savings.
- 2,800 applications submitted since go-live.
- 800 program offers extended since go-live.
- 275+ Cases generated and resolved since go-live.



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, in-house SQL-Based Academy Management System</i> |
| Salesforce products deployed: | <i>Service Cloud, Community Cloud, Government Cloud, Chatter</i> |
| Customer Business Model (B2B, B2C, or Both) | <i>B2C</i> |
| Salesforce Product features: | Lightning: <i>Lighting Deployment</i> Sales Cloud: <i>Mobile, Operational Analytics (rpts and dashbds), Microsoft Integration</i> Service Cloud: <i>Case Management, Service Communities Portals, 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>Integration, Custom App Dev (Lightning and Javascript), Reporting against custom data</i> Salesforce.org (Foundation): <i>Higher Education Data Architect (HEDA)</i> Salesforce Industry Products: <i>Government Cloud</i> |
| If using Service Cloud, list use case (e.g. customer support, call center, field service, telesales, etc.) | <i>Summer program application, registration and payment submission community</i> |
| Integrations: | <i>Home-grown, SQL-based Academy Management System</i> |
| AppExchange Apps/Partners | <i>S-Docs, Chargent</i> |
| Solution 'Go Live' date: | <i>01/15/2019</i> |



Screenshots of app

UNITED STATES MILITARY ACADEMY
WEST POINT

Home My Checklist Contact Us FAQ

Welcome to the West Point Summer Leaders Experience Registration Site

Click on the "My Checklist" tab above to complete your application.

Please Be Advised:
Distribution for the initial round of SLE Offers will begin approximately the first week of February.

My Application Status
Pending

Thanks so much for your interest in attending the 43rd Annual Summer Leaders Experience (SLE) at West Point. We will review your application status soon. You will receive an email alert when your application status changes. You can log on to this website at any time to review your current SLE application status.

Now that you have successfully started your SLE application, you will return to this site throughout the SLE process to complete your supporting documents, make payment, etc. To save you time in the future, we have also used the information you provided for your SLE application to create a USMA Admissions file. This Admissions file also gives you access to a USMA Candidate Portal that you will use next year if you decide to apply to be a USMA Cadet. We mention the USMA application file and the Candidate Portal merely so you can be aware they exist and to prevent any confusion that might arise from any system notifications you might receive. To be perfectly clear however, the website you are currently using is where you will return to manage all your SLE application steps and documents.

Click here to learn the three things you should start doing immediately as you consider attending college at West Point.

My Preferred Session
2019 SLE 2
June 8, 2019 - June 14, 2019

West Point Admissions
CANDIDATES
DUTY - HONOR - COUNTRY UNITED STATES MILITARY ACADEMY

WORKSHOP PREFERENCES

Place **ALL OF THE FOLLOWING WORKSHOPS** in your order of preference by clicking the ">" button to move them to the "SELECTED" list. When you've selected all of your workshops, you'll then be asked to select your week preference.

Workshops Available

- Behavioral Sciences and Leadership Workshop
- Chemistry and Life Science Workshop
- Civil and Mechanical Engineering
- Cyber Security Workshop
- Electrical Engineering Workshop
- English Workshop
- Mock Trial Workshop

Workshops Selected

- Leadership and Ethics
- History Workshop
- Kinesiology
- Mathematics Workshop
- Foreign Language Workshop
- Physics Workshop
- Social Sciences Workshop
- Systems Engineering Workshop
- Geography/Environmental Engineering Workshop



Screenshots of app

SLE Offers Mgmt Dashboard

SLE Offers by Race

| Race | Percentage |
|---------------------------|------------|
| WHITE (CAUCASIAN) | 17.04% |
| ASIAN | 11.56% |
| BLACK OR AFRICAN AMR... | |
| AMERICAN INDIAN OR AL... | |
| NATIVE HAWAIIAN / PACI... | |

Application Status Pipeline

| Application Status | Count |
|--------------------|-------------|
| PENDING | 459 |
| ACCEPTED/IN... | 315 |
| DECLINED | 162 |
| Total | 1.6k |

Offers by Preferred Session

| Preferred Session | Count |
|-------------------|---------------|
| 2019 SLE 1 | 1.2k (47.27%) |
| 2019 SLE 2 | 1.4k (52.73%) |
| Total | 2.6k |

Offers by Race

| Race | Percentage |
|----------------|------------|
| WHITE (CAU...) | 17.11% |
| ASIAN | 11.5% |
| BLACK OR AF... | |
| AMERICAN I... | |
| NATIVE HAW... | |

Target Gauges

| Target Group | Goal | Actual | Percentage |
|--------------------------|------|--------|------------|
| Target African Americans | 15% | 79% | 79% |
| Target Asians | 10% | 115% | 115% |
| Target Hispanics | 10% | 91% | 91% |
| Target NHOPi | 2% | 11% | 50% |
| Target Native Americans | 2% | 17% | 77% |
| Target Females | 30% | 228 | 69% |

Applicant List

| ID | NAME | SLE APPLI... | OFFE... | PREFERRED... | GENDER | RACE | CON... | CE... | WHOL... |
|----|------|--------------|------------|--------------|-------------------|------|--------|-------|---------|
| 1 | | PENDING | 2019 SLE 2 | Female | ASIANS | IL | | | |
| 2 | | PENDING | 2019 SLE 2 | Male | ASIANS | IL | | | |
| 3 | | PENDING | | Male | ASIANS | CA | | | |
| 4 | | PENDING | 2019 SLE 1 | Female | WHITE (CAUCASIAN) | MI | | | |
| 5 | | PENDING | | Male | WHITE (CAUCASIAN) | NY | | | |
| 6 | | PENDING | 2019 SLE 2 | Female | ASIANS | CA | | | |
| 7 | | PENDING | 2019 SLE 2 | Male | ASIANS | CA | | | |
| 8 | | PENDING | 2019 SLE 1 | Male | WHITE (CAUCASIAN) | WV | | | |
| 9 | | PENDING | 2019 SLE 2 | Male | WHITE (CAUCASIAN) | OH | | | |
| 10 | | PENDING | | Male | ASIANS | FL | | | |
| 11 | | PENDING | 2019 SLE 2 | Male | WHITE (CAUCASIAN) | IL | | | |
| 12 | | PENDING | 2019 SLE 1 | Female | WHITE (CAUCASIAN) | IL | | | |
| 13 | | PENDING | | Female | WHITE (CAUCASIAN) | ID | | | |
| 14 | | PENDING | | Male | ASIANS | WA | | | |
| 15 | | PENDING | 2019 SLE 2 | Female | WHITE (CAUCASIAN) | CA | | | |
| 16 | | PENDING | | Male | WHITE (CAUCASIAN) | UT | | | |
| 17 | | PENDING | | Male | ASIANS | NJ | | | |

USMA West Point SLE Dashboard

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| BLACK OR AF... | |
| AMERICAN I... | |
| NATIVE HAW... | |

SLE Offers by Congressional District

| Congressional District | Record Count |
|------------------------|--------------|
| NY18 | 20 |
| PA06 | 10 |
| NY03 | 9 |
| CA18 | 8 |
| CO05 | 8 |
| MD08 | 8 |
| VA01 | 8 |
| PA10 | 7 |
| MA03 | 6 |
| MA04 | 6 |
| MD06 | 6 |
| NJ11 | 6 |

SLE Not Selected by Congressional District

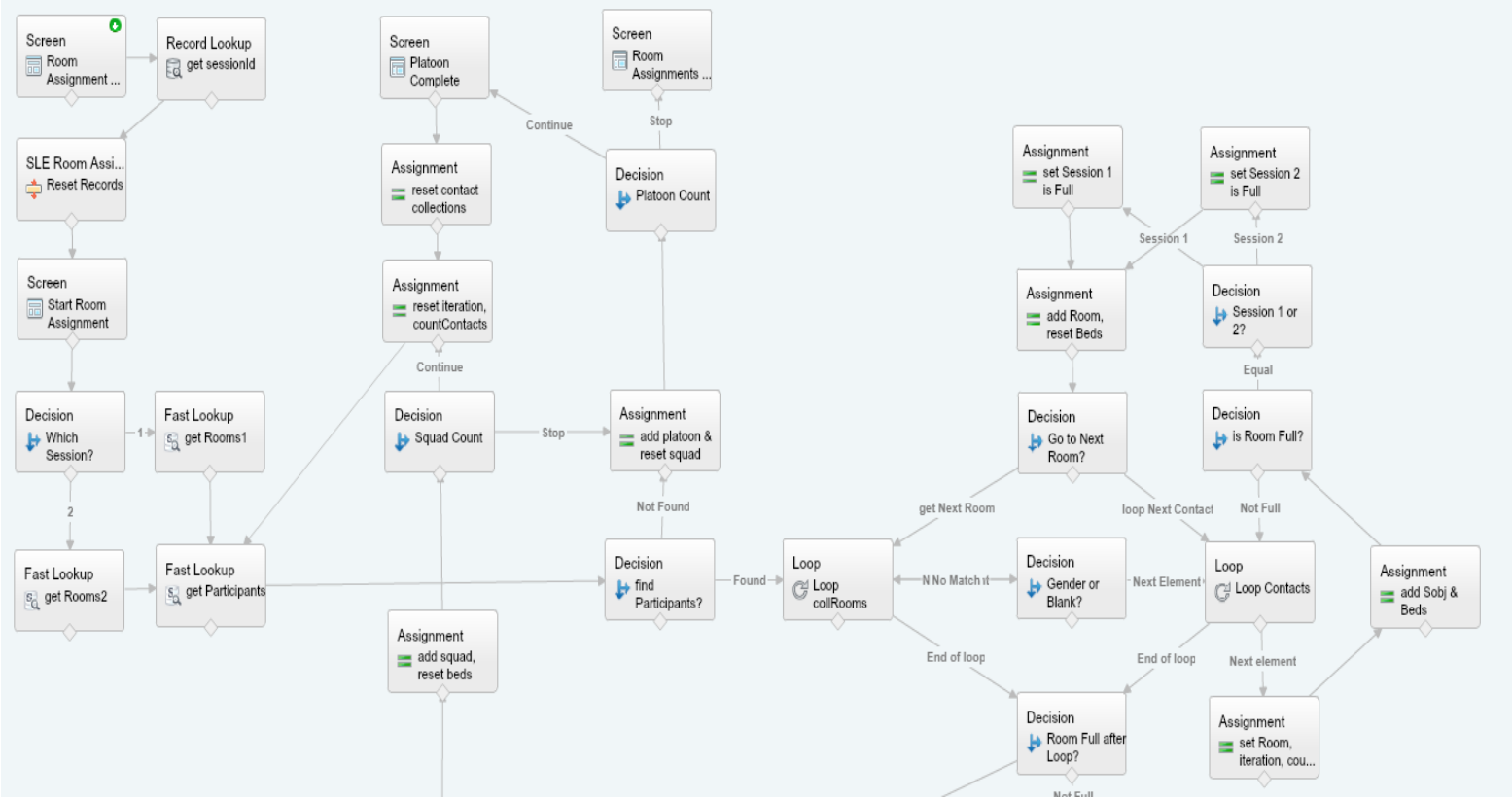
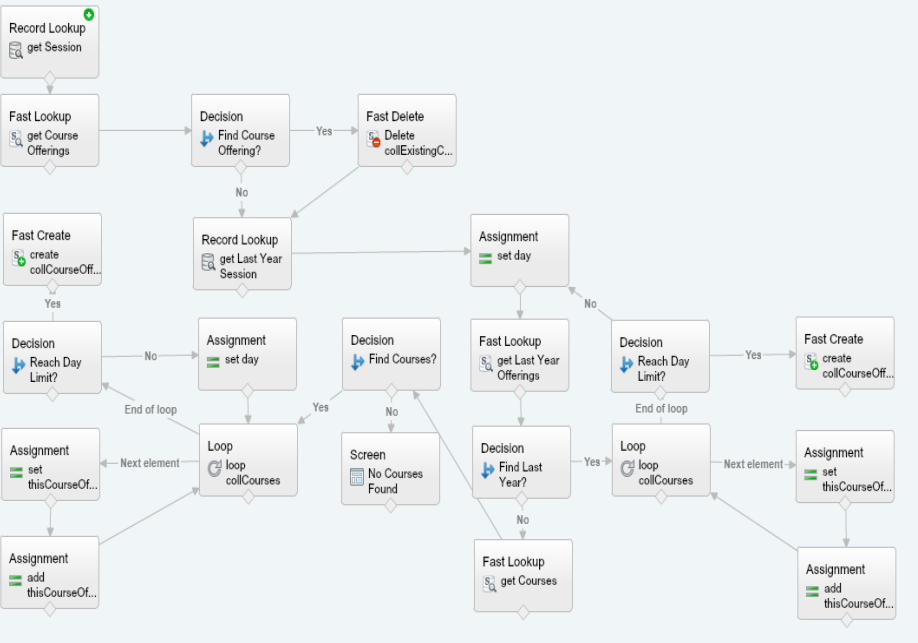
| Congressional District | Record Count |
|------------------------|--------------|
| NJ07 | 7 |
| NY11 | 7 |
| NY11 | 6 |
| PA06 | 6 |
| NJ05 | 5 |
| AL05 | 4 |
| CA26 | 4 |
| GA01 | 4 |
| NJ02 | 4 |
| NJ04 | 4 |
| NY17 | 4 |
| OR01 | 4 |

Recent Records

- SLE Dashboard
- SLE Applicants
- ANNE FOLEY
- Active Users Report (ADMIN)
- Active Members



Screenshots of app



Screenshots of app

USMA West Point Home **Contacts** Registration Checklists Power of Attorney Medical Questionnaires Privacy Acts Release from Liability Photo & Video Authorizations More

All Search Contacts and more...

Contact [Redacted]

+ Follow Log in to Community as User View Customer User Edit

| USMA ID/C-Number | SLE Application Status | Preferred Session | Offered SLE Session | Email |
|------------------|------------------------|----------------------------|----------------------------|------------|
| [Redacted] | ACCEPTED/IN PROGRESS | 2019 SLE 1 | 2019 SLE 1 | [Redacted] |

Details

Contact Details

| | |
|------------|----------------------------|
| Name | SLE Application Status |
| [Redacted] | [Redacted] |
| CEER Score | Offered SLE Session |
| [Redacted] | 2019 SLE 1 |
| | Assigned SLE Session |
| | 2019 SLE 1 |

SLE Information

| | |
|----------------------------|-------------------|
| USMA File Status | Platoon |
| NOT EVALUATED | [Redacted] |
| SLE Attendance Status Code | Squad |
| [Redacted] | [Redacted] |
| SLE Status Date | SLE Assigned Room |
| [Redacted] | [Redacted] |

- Personal Information
- Address Information
- Parent Information
- Emergency Contact Information
- Additional Information
- Primary Affiliations
- System Information

We found no potential duplicates of this contact.

Registration Checklists (1)

Status: Pending USMA Review

[View All](#)

Affiliated Accounts (1)

AF-003557

Organization: United States Military Academy

Affiliation Type: Educational Institution

Role: Prospect

[View All](#)

Relationships (0)

Addresses (1)

A-02402

Address Type: [Redacted]

Mailing Address: [Redacted]

[View All](#)

USMA Applications (1)

USMA-001253

[View All](#)

Program Enrollments (1)

PE 1206

Program: [Redacted]

Eligible to Enroll: [Redacted]

Admission Date: [Redacted]

[View All](#)

Course Connections (0)

SLE Preferences (3-)

Cyber Security Workshop

Rank: 1

Record Type: Workshop

Leadership and Ethics

Rank: 2

Record Type: Workshop

Kinastology

Rank: 3

Record Type: Workshop

[View All](#)

Cases (0)

AMS Staged Imports (3-)

STAGE-0000019482

STAGE-0000019478

STAGE-0000022805

[View All](#)

Notes & Attachments (0)

Upload Files

Or Drop Files

Contact History (3-)

| | |
|----------------|------------------------|
| Date | 2/18/2019 10:25 AM |
| Field | SLE Application Status |
| User | [Redacted] |
| Original Value | OFFERED |
| New Value | ACCEPTED/IN PROGRESS |
| Date | 2/18/2019 10:25 AM |
| Field | Assigned SLE Session |
| User | [Redacted] |
| Original Value | [Redacted] |
| New Value | 2019 SLE 1 |
| Date | 2/12/2019 9:03 AM |
| Field | SLE Application Status |
| User | [Redacted] |
| Original Value | PENDING |
| New Value | OFFERED |

[View All](#)

Activity Chat

Email [Redacted]

Write an email... [Compose](#)

Filters: All time - All activities - All types

Session: Expand All

Next Steps

No next steps. To get things moving, add a task or set up a meeting.

Past Activities

- USMA Participant Medical Que... 6:00 PM 1 Feb 22
- Last opened 4 days ago
- Reminder to Complete the SLE Ap... 4:32 PM Feb 7
- set a list email
- Connection Concerning Attachment... 4:08 PM Jan 28
- set a list email

[Log All Other Past Activities](#)



Screenshots of app

SCREENSHOT / DEMO

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

▪<https://www.useloom.com/share/b3331539cbc548cc883648a4caeed8e4>



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 |

