



CANDORIS<sup>SM</sup>



# CASE STUDY

UTILIZING PINPOINTED DATA AND PERSONALIZING  
COMMUNICATION TO DRIVE STUDENT SUCCESS

# BUSINESS CHALLENGES AND NEEDS

*“We needed a CRM to track activity and identify how engaged relationships are between students and educators. We had a lot of data, but our systems weren’t talking to each other. We just had to make it better.”*

- David Nguyen  
Director of Digital Engagement

**Budget Constraints** – Needed to align with a nonprofit budget

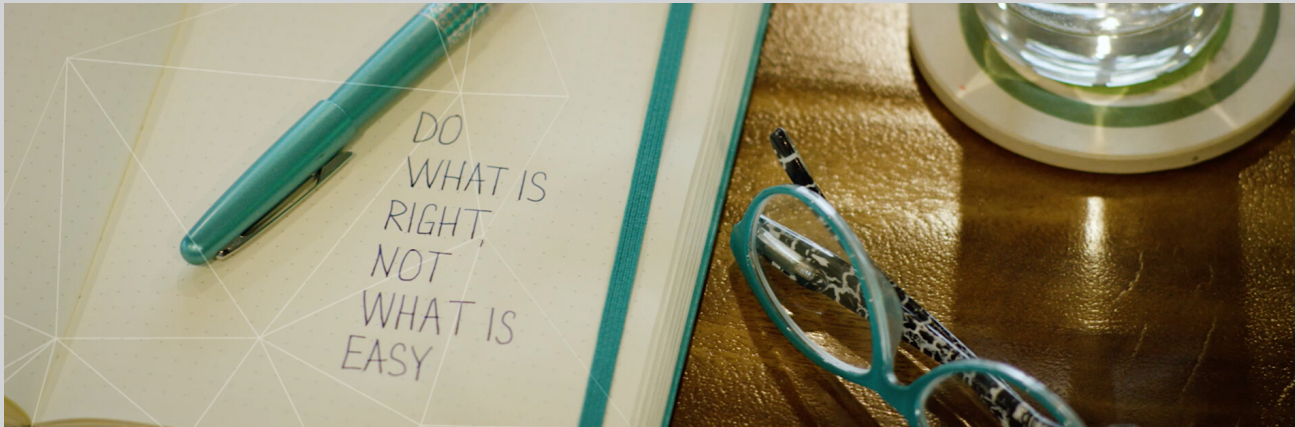
**Limited Staff** – Solutions had to be sustainable by a team of three who support outreach and marketing to over 700,000 students and 7,000 schools

**Space-Saving Database** – Filtering and storing mass amounts of data necessitated a robust CRM with custom-coded programs to connect the dots between CMS activity data and email/ text marketing platforms

**Personalized User Experience** – Adding email automation and tailored communication that pivoted to meet users on their various journeys was critical to achieving enhanced engagement

For Get Schooled, a nonprofit organization focused on improving college access and success to high school students, the next step in their growth and development was simple: “We needed a CRM to track activity and identify how engaged relationships are between students and educators. We had a lot of data, but our systems weren’t talking to each other. Our current backend database didn’t pinpoint activity data. Our reporting was slow and multiple reports needed to be created. We just had to make it better,” said [David Nguyen, Director of Digital Engagement](#). The need was clear: conquer hurdles in utilizing large amounts of data and activity and be creative in using statistical information to report on engagement.





*"We learned about the Candoris commitment to community service, and how staff are given a week paid to do service projects; this tells me that they have dedication to helping others and supporting their community. That was the difference maker. Our gut feeling at the end of the day was to go with Candoris."*

Get Schooled impressed the Candoris team from the very beginning with their web-driven, customer-facing gamification experiences for students. They had even identified their specific pain points; they just needed a partner to help them and guide them to the right tools. They started looking at Salesforce primarily with the intention of purchasing Pardot, which would allow them to move away from MailChimp. They also had their eye on Salesforce itself and wondered if it would be a viable, affordable CRM option. Salesforce organized meetings for Get Schooled with some of their various implementation partners, yet the customer was unable to visualize their needs being met with any of them. Time and again, Nguyen and his team received pitches of canned solutions, but they knew that their task at hand didn't qualify as "out of the box". Get Schooled needed a large Pardot licensing, and a partner with both extensive Pardot and Salesforce experience, as well as a good track record working with nonprofits. Once they were matched with Candoris, David finally felt that a company took the time to understand their pain points and had the necessary experience and creative capabilities to be their solution implementation partner. "We look for partners that get excited for what we do. We want them to feel like what they're collaborating on contributes to what we're driving. We learned about the Candoris commitment to community service, and how staff are given a week paid to do service projects; this tells me that they have dedication to helping others and supporting their community. That was the difference maker. Our gut feeling at the end of the day was to go with Candoris," said [Nguyen](#).

# DISCOVERY

*“In order to enhance an organization’s mission, we need to hear it, know how to drive it, know how to support it. We constantly strive to connect the money they are spending back to something meaningful to them.”*

- Phil Burns, Candoris Senior Business Analyst



During the discovery phase, Candoris learned that Get Schooled was looking at both Salesforce Marketing Cloud and Pardot. Candoris reiterated the dynamic features of Pardot that would be perfect for them. “Teenagers, millennials...they’re always texting. I didn’t realize that Pardot has a great texting platform as well as email automation, engagement journey, and segmenting capabilities,” [Nguyen](#) commented. Candoris also promoted Salesforce, because as a nonprofit, Get Schooled had the opportunity to obtain free licenses for a state-of-the-art CRM that would enable them to not only store mass amounts of data on the backend of their website, but nurture their customers in a new way. From that point, Candoris software engineers could create custom developed pieces, such as a method for report generation.

As the project moved into the hands of Candoris solution engineers, critical questioning began. How would they get current data from Get Schooled into Pardot? What to do about limited Pardot APIs? How did the existing Get Schooled website fit into Salesforce and Pardot? There were no templated solutions. After spending some time with these questions, the path became clear. Engineers worked to develop a strong communication between the existing customer site and their new Salesforce instance, and Salesforce already had a strong link to Pardot. This opened the opportunity for a new student to sign up, become a contact in Salesforce (if criteria met the established filters so as to optimize storage space), and automatically become a Pardot prospect that can be marketed to. Once people are in Pardot, they are categorized. Lists feed engagement studios and flow into drip campaigns, allowing people to receive relevant content and be nurtured over time. Within one month, the Get Schooled team had fully adopted Pardot, and after a second month, they had implemented and were using Salesforce.



*“Oh, we LOVE Candoris!”*

## THE AUTOMATED, PERSONALIZED ENGAGEMENT ADVANTAGE

The Get Schooled team was thrilled with the outcome of their project. Before, all users enrolled in challenges would receive general weekly emails that were created manually, whereas now, they are sent pinpointed, relevant correspondence tailored to them and to where they are at in whatever challenge they are in. “This saves an immense amount of time,” Nguyen shared. “Now, we do ‘engagement journeys’. Someone signs up to take part in a particular challenge, and they receive timely emails to help them through each phase of it. Previously, we didn’t have the capability to personalize content to introduce, onboard, and get folks connected to what we were doing. We now have the opportunity to send tailored calls to action in an automated way. **Efficiency, strategy, personalization, impact- they are all there now!**”

Additionally, this new methodology has been looked upon favorably by Get Schooled partners. “We now have opportunities to collaborate and sell this program to our partners. They are loving this type of work that we are now doing; it’s hard to communicate with students! By layering text into a CRM, where the student profile is right there... our partners are excited about this.”

At Candoris, we strive to seek success for others. This means taking the time to understand what a customer is asking, and then helping them get there. This project’s main goal was to support Get Schooled in all the ways that they already positively impact students’ lives, making the organization more effective and enhancing their voice. When asking the Get Schooled Executive Director to reflect on their project and on their new relationship with Candoris, she immediately exclaimed: “Oh, we LOVE Candoris!”

### SUPERCHARGING PRODUCTIVITY

With a customized solution from Candoris, Get Schooled is able to tailor content to **over 700,000 students in 7,000 schools.**

