Salesforce and Lava Protocols
for Educational Institutions

PROJECT BRIEF ON THE EDUCATION SECTOR

Lava Protocols,

Helping Educational Institutions Manage Their Internal Functions and Make Critical Decision Using Salesforce

Our Client.

One of the premier private tertiary education institutions in Malaysia, our client has been in operation since the 1960's. Since then they have grown to consist of primary and secondary institutions.

They have continuously provided excellent services to their students via diverse study options, relevant curriculum and teaching methods, ongoing partnerships with leading universities worldwide, strong industry linkages, up-to-date facilities and well-equipped campuses. This has resulted in them receiving many awards and becoming internationally recognised as one of the best and most trusted institutions in the country.

Challenges.

The current education landscape within Malaysia has become very saturated, resulting in increased competition in a limited student pool on an annual basis. To overcome this problem, **the client was in need of a CRM system that would help manage their internal counsellors and departments to perform critical decisions with necessary information.** These information should be available immediately and easily accessible to staff as opposed to consolidating data from multiple sources which otherwise would be time consuming. With students being pursued by multiple colleges and universities, reaching out to the students at the right time is imperative to our client.

Solution.

Lava proposed a solution to our client that was flexible and more importantly, easily adaptable by internal employees.

This entailed monitoring of management gaps under one platform and transparency across sales team to allow for better tracking of sales opportunities. Lava Protocols implemented the Sales Cloud (CRM) solution for management of the student enrollment process that caters for and includes the following:

1. LEAD MANAGEMENT

Direct capture of potential leads for student enrollment from our customer's website directly into the CMS platform. Once captured, the leads are then routed to the related department and counsellor for further qualification prior to the lead being converted into a potential student and enrollment application.

INTEGRATION 2.

Having a CRM alone is half the journey; so to ensure the enrollment process is seamlessly incorporated the payment process and registration within the client's own Student Management Systems backend, Lava Protocols put in place a real-time bi-directional integration between these two backend systems and the CRM system.

3. APPLICATION STAGE

All enrollment applications are vetted by counsellor prior to being deemed sufficiently qualified to be sent to the respective college's Student Management System for the offer process.

OFFER STAGE 4.

Counsellors will verify if the admission requirements are met and continue to update the status of the application on the system. As pre-defined business conditions are met within the applicant's application, the CRM would initiate email notifications to be sent out to the applicant. The applicant would then be provided with an offer letter for the desired course at this stage.

5. ACCEPTANCE STAGE

Once the student accepts or rejects the offer, an automated email will be sent to the counsellor on the offer status. If the offer is accepted, the counsellor will direct the applicant to the finance department to make the necessary payment.

COMMENCEMENT 6.

Finally, processing of payment will be done by the finance department in the backend Student Management System, which will update the necessary payment details back to the CRM system via the integration. The CRM will then send a confirmation email to both the student and the counsellor on the successful registration and schedule of classes.

Conclusion.

Overall, by implementing the Salesforce.com CRM our client has been able to speedily connect to the applicant, get prompted on key actions, interact intra and interdepartment a lot faster and with more transparency. The end result is a seamless end-to-end process for the student enrollment. The speed and accuracy in data transfer has resulted in an increase of student enrollment as well as a swifter sales process.