

Enhancing Partnerships with Salesforce Solutions

THE CHALLENGE

The University at Buffalo Business and Entrepreneur Partnerships (BEP) office connects academia, industry and entrepreneurs to collaborate on R&D, commercialize new technology and provide access to talent pipelines. The team builds public-private partnerships that support new discoveries and market opportunities that positively impact society. The BEP office was in growth mode: taking on new grants to administer, new programs to manage, and hiring and training new employees. A few team members had used Salesforce for nearly a decade, but BEP needed to quickly build and revitalize their legacy Salesforce system to reflect their "new" organization and business processes. The Salesforce refresh initiative was positioned to produce robust reporting to deepen industry partnerships, accelerate knowledge transfer and increase transparency across internal business units and with leadership.

THE SOLUTION

Redpath designed a 360-degree solution that allows for prospect and sales process tracking, program management, internal collaboration, and impact measurement. Key solution deliverables included:

- Implementing Sales Cloud to manage the engagement prospecting processes, with a high focus on a broad and consistent set of stages for enhanced reporting.
- Redpath provided intellectual property, custom design, and build to deliver a Salesforce implementation that now enables the BEP team to know what UB faculty invented, what they were seeking to patent, and whether an industry partner was licensing that technology
- Program management, custom design and build to allow BEP to track who is engaged in their programs, what resources they're using, and the effectiveness of each engagement. This includes tracking financial transactions, achievements, compliance and hours.
- Redpath provided customized activity tracking to understand internal and external referrals of faculty or industry to other BEP or external programs, including outcome tracking to measure effectiveness.

THE RESULTS

BEP team members have embraced the Salesforce Org and it has become part of their day-to-day operations.

- Streamlined business processes to increase end user efficiency by reducing data silos, automation to reduce manual data entry, and centralized data tracking that eliminates weeks of manual data compilation at the end of every fiscal year.
- Enhanced system capabilities to track additional BEP programs and resources, moving towards a full 360 degree view of constituents
- Improved reporting capabilities to better drive operations and measure impact

YOUR PATH TO SUCCESS

Redpath has proven success methodologies to help you as your university teams evaluate digital strategies to transform Recruiting, Admissions, Student Services, Advancement, Corporate Partnerships, Marketing and Engagement. Reach out to us and we can discuss your best path to success.

"Redpath created an environment of trust that resulted in a solution that was customized to our business. They are now a vested partner."

- Tracy Krawczyk-Schiedel