



CREDO

Industry: High Tech for Higher Ed

Application: Sales Cloud

Getting the Most out of Credo's Salesforce Investment

Credo is a higher ed consulting firm specializing in independent colleges. Since 1995, Credo has served over 440 clients in areas including academic programming, enrollment and financial aid, student success and more.

The Challenge:

- Limited implementation of Salesforce using only 20% to 25% of the system's capabilities.
- Key business metrics weren't accessible in the system slowing decision making by leadership.
- An overall outdated Salesforce implementation was causing pain points around growth.
- Limited in-house Salesforce administrator options meant they needed a cost effective solution that could offer both a broad knowledge base for guiding strategy and in depth technical expertise for implementing and supporting their Salesforce instance.

The Solution:

- Developed strategy with leadership around most impactful immediate action and priorities for system.
- Developed and implemented a major restructuring of the data model to support reporting.
- Ensured tight integration of data and created dashboards for quick viewing of information in the system.

Benefits:

- New reports and dashboards allowed the leadership team to react more quickly to changing business needs.
- Increased adoption of Salesforce across the company creating a single source of truth.



"From the very beginning Cloud Giants has been true partners to us, rather than a vendor/client relationship. We value CG's voice and recommendations and enjoy having critical conversations to talk through difficult issues and come up with potential solutions."

-Emma Jones, Executive VP, Credo