

Client

Educational institution that has been ranked as one of the top colleges in the US. The university is also known for its commitment to sustainability, with several eco-friendly initiatives in place, including a solar-powered electrical system.

Solution

Salesforce Education Cloud,
Salesforce Service Cloud,
Salesforce Sales Cloud,
Salesforce Marketing Cloud,
Pardot, Jitterbit

Industry

Education

Background

Due to COVID-19, the university implemented remote learning, resulting in a higher number of students. With the growing number of students, IT department realized that the current software they are using is not scalable enough.

Project Team

The project was carried out together with US implementation partner Tondro. The RA team provided Implementation team:

- 1 Salesforce Technical Architect/Consultant
- 2 Salesforce Engineers
- 1 Functional Consultant



Timelines

3-5months



Project Budget*

89K - 147K \$ | €
Considering mixed team
rate 60€ per hour



NDA

non-disclosure

*(License Costs are not included and may vary)

Challenge

The Client used a custom-built legacy system to track Student Success. For Student Recruitment and Admissions, the university used spreadsheets, which were recreated at the beginning of each year. Student Success Management is implemented on top of a custom-built heavy legacy system which faced scalability issues such as:

- No functionality to identify at-risk students: educational facility relies on tutors to identify at-risk students and missing some risk cases. The legacy system didn't provide capabilities to highlight and identify such students proactively.
- Limited personalization: lack of ability to build personalized learning plans for individual students and groups. No ability to assign learning programs to specific individuals and track their performance.
- Inefficient communication and collaboration: Communication between faculty, staff, and students is disjointed and inefficient, leading to potential delays or gaps in providing necessary support. As well as participants bypass this system and use WhatsApp, SMS, and other channels to communicate on specific issues.
- An application does not handle financial processes due to a lack of out-of-the-box security configurations. All financial processes were handled typically via email and data was stored only in the accounting system. Which resulted in fragmented data and an increasing number of errors.

Solution

The Client decided to migrate the entire solution to Salesforce. The Routine Automation team gathered requirements for Student Recruitment and Admission processes as well as for the Student Success Management app.

To maintain facility operations project was divided into several phases that implement or replaced legacy modules.

The Routine Automation team implemented Student Recruitment and Admission processes on top of Salesforce Education Cloud as **Phase #1**. Data collected in spreadsheets was cleaned up and migrated to Salesforce. To manage applications Learner Portal was configured and customized. The lighting Scheduler was configured to allow scheduling interviews with applicants.

As the parallel **Phase #2 MVP** of Student Success Management was implemented on top of Salesforce. This allowed managing, personalizing, and tracking learning programs, and the academic progress of students, and have the ability to assign learning programs. The RA team helped with the configuration and migration of existing learning programs, campus resources, and etc., as well as the security model for different user roles.

In **Phase #2.1 Model Behavior Management** was configured to monitor student behavior and identify at-risk students. For students, Student Hub was implemented with the help of Experience Cloud. This allows students to track their progress, and request support on different topics related to learning programs as well as any campus-related issue. Case Management was configured to allow students to solve their problems in the student hub.

During **Phase #3** the RA team integrates Salesforce with the billing and accounting system to automate and simplifies the billing and invoicing process, reducing manual data entry, and ensuring accurate and timely financial transactions. Middleware (Jittebit) was used to organize data exchange between the systems.

Results

- ✓ The scalability of student recruitment and the admission process helped to decrease the workforce capacity required to maintain admission processes. The quality of the data collected about potential students helps to develop pre-entry learning programs and increase the quality of the prospective students.
- ✓ Education Cloud provides enhanced capabilities for personalizing learning programs, making personalized learning experiences accessible to more students. This results in improved education quality and boosts the reputation of the institution.
- ✓ Communication and collaboration are organized inside of the Education Cloud which brings transparency and allows faster responses to questions.
- ✓ The Salesforce Automation platform allows easily adapting applications to changing requirements, which results in reduced implementation and maintenance costs.
- ✓ Education Cloud effectively streamlines work processes not only for college tutors but also for administration and support staff. It is freeing up their time to concentrate on more complex tasks that demand creativity and innovation. The increased efficiency results in enhanced productivity.
- ✓ Salesforce Education Cloud provides a rich reporting platform and increases the ability to make data-driven decisions, supported by comprehensive insights and metrics that are stored in Salesforce.

"We found a great flow of communication and work and we are happy with our business relationship. The engagement has successfully rolled out 90% of CRM operations. Routine Automation's development is streamlining communications, reducing response times, and increasing CSAT. The team understands company ideals and identifies client needs accurately to address issues that arise."