OPERATIONAL PERFORMANCE SERVICES

SIG

FOR SALESFORCE HIGHER EDUCATION

Are you getting the most out of your Salesforce investment? Are you confident in your security and user training? Does your institution struggle with maintaining your Salesforce deployment while balancing other priorities? We know how difficult this can be. Don't let things fall between the cracks. **The days of implementing a system and leaving it untouched are gone.** Your institution depends on its technology. Don't let security issues, technical debt, and obsolete training adversely impact students, faculty, and staff. SIG's Operational Performance Services (OPS) for Salesforce is a cost-effective solution to address these challenges.

What is OPS?

Operational Performance Services (OPS) for Salesforce is a solution to keep your Salesforce deployment properly serviced. OPS enables your busy staff and management to focus on the business at hand. OPS is customizable based on the needs of your institution.

All OPS for Salesforce plans include the following:

- Annual CORE Salesforce baseline analysis by SIG
- Review session for your baseline scorecard
- Tailored communications for your institution's utilized CORE Salesforce solutions, including feature updates, critical alerts, and feature retirements
- Review of deployed security measures against changes in institutional standards for system access
- Micro training sessions focused on essential CORE offerings and "need to know" elements
- ShareViewer™ managed application for sharing visibility

CORE Salesforce Solutions include: Education Cloud, Sales Cloud, Service Cloud, Experience Cloud, Marketing Cloud and Marketing Cloud Account Engagement.

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BENEFITS AT-A-GLANCE

- Stay updated on CORE Salesforce solution feature releases, critical updates, and feature retirements

- Understand compliance with changing institutional standards for security and system access

- Leverage new features and functions more quickly

- Increase productivity with micro trainings

- Reduce support costs with embedded support options

OPS plans with the embedded support option include creation of an annual action plan for your institution by quarter. Plans are customized to meet your institution's specific areas of need.

The following is a summary of activities that can be included in your annual plan:

Data Health/Quality
Backup Strategy / Test Plan
Data Normalization
Data Append / Auto Population
Ownership / Storage Analysis

Governance/Change Management
Salesforce Org Documentation
Org Governance / Steering Committee Planning
Delegated Administration Strategy
Change Management / Sandboxing

Security
Critical Alert Management
System Access Policies
Record Sharing / Profile / Permissions
Encrypted fields / Salesforce Shield
External sharing / exposure

Technical Debt/Supportability
Unused fields/roles/profiles/objects/reports/dashboards
Expired/unused applications
AppExchange Package Updates
Workflow/Process Builder to Flow Conversion
Lightning Upgrades
Unused code/trigger removal/out of date APIs

Performance/Efficiency
Scheduled Job Review
Page Load time analysis / strategy
User Experience (UX) improvement
Einstein Activity Capture
Work automation
eSignature / Digital Document Transformation (DDX)

Industry Updates/Deep Drives
Education Data Architecture (EDA)
Nonprofit Success Pack (NPSP)
Student Success / One-Stop
Workforce Management
Advancement
Beyond the Learner

Training/Adoption
Refresher and New Admin Training
Admin Utility Training
New Feature Training
New User Training
1:1 Competency Workshops
Managing with Salesforce Workshop
User Adoption Strategy

Functional Updates/Deep Dives
Marketing Cloud
Marketing Cloud Account Engagement (Pardot)
Experience Cloud (Communities)
Sales Engagement
Digital Engagement (Chat/SMS/Bots)
Slack Collaboration and Automation
ISV Solutions (Conga/FormAssembly/Mogli/Others)

Other SIG OPS Offerings!

- Student
- Student AR
- Financial Aid
- HR-Payroll
- Identity Management
- Finance
- Advancement
- Degree Works
- Remote Database Administration
- Business Intelligence

SIG

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For more information and pricing, visit: www.sigcorp.com/contact-us-solutions/