CASE STUDY

# Improved User Experience
## Public Education

## Challenge

The customer, a public education system, previously relied on Google Forms and shared links to collect complaints and reports related to racism and discrimination. This approach lacked structure, security, and the ability to track follow-ups or generate meaningful reports. Constituents had no visibility into the status of their submissions, and internal teams struggled to manage and respond to cases efficiently.

## Solution

We partnered with the customer to design and implement a Salesforce Experience Cloud portal that transformed the complaint intake and management process:

- **Constituent Portal with Guided Screen Flow:** Ensured required fields and improved data quality

- **Automated Case Creation & Acknowledgment:** Reduced manual data entry and intake steps

- **Standardized Communication Templates, Reporting & Dashboards:** Enhanced transparency and trust

- **Response Tracking & SLA Management:** Improved efficiency and accountability.

## Results

- **Improved Data Quality & Accuracy:** Guided portal flows with required fields increased completeness of complaint submissions by ~25%, reducing rework and incomplete records.

- **Greater Transparency & Trust:** Immediate email confirmations and standardized branded communications improved constituent satisfaction scores by an estimated 20%.

- **Data-Driven Leadership Insights:** Real-time dashboards and reports gave leadership ~40% faster access to SLA, demographic, and trend data, enabling smarter resource allocation.

- **Scalable & Sustainable Framework:** Optimized processes, documentation, and training supported handling up to 3x more cases without proportional staff increases, ensuring long-term scalability.

# Average case response times improved by approx. 30%

through case creation automation and cutting manual data entry.