

The MCC Employer Hub

Partnerships Built on Clarity

Today's Challenge: A Siloed View

No Central View: Multiple departments are talking to the same partners, but no one can see the full conversation.

No Clear Point of Contact: Partners have to reach out to multiple departments and have the same conversation multiple times.

Poor Partner Experience: Ultimately, this friction costs time and risks valuable relationships.

The Solution: A Single, Unified Hub

Centralize

One 360-degree view for every partner. See all emails, meetings, and opportunities in one place.

Automate

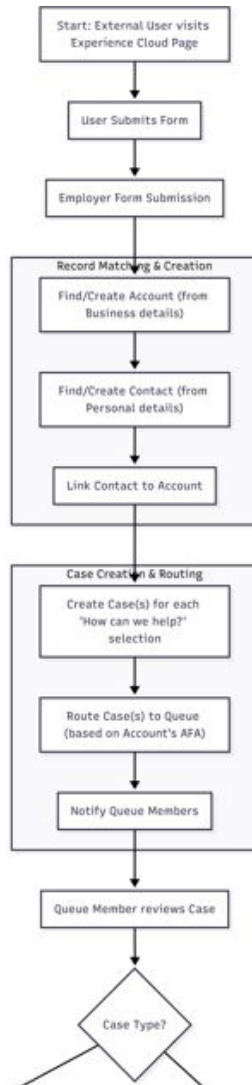
Instantly route new inquiries from a web form to the correct team or "Queue" every single time.

Report

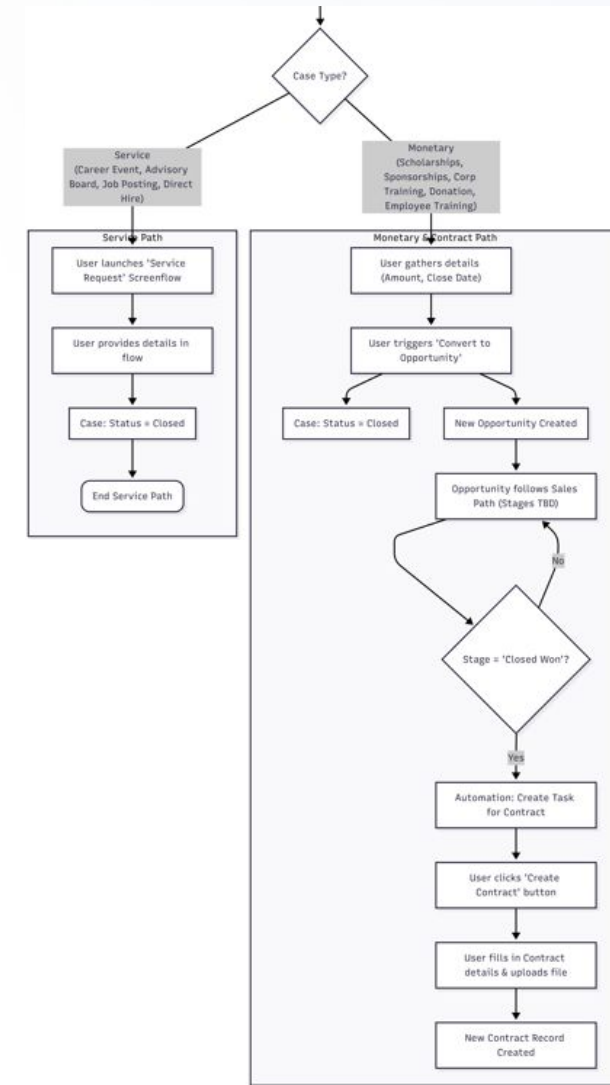
See your entire pipeline, from first contact to signed contract, with real-time dashboards.

The Process Flow

Part 1: Initial Inquiry & Routing



Part 2: Monetary & Service Paths



[Link to chart](#)

Opportunity vs. Case

In Salesforce, an Opportunity is a potential or active sales deal, while a Case is a record for customer service issues or inquiries. An Opportunity tracks the progress of a sale, including its potential revenue, and moves through the sales funnel, while a Case handles customer support

Opportunity

- **What is it:** A specific sales deal being pursued, often with an estimated monetary value.
- **Purpose:** To track the journey of a potential sale, from qualification to closing the deal.

Case

- **What is it:** A work item that tracks a customer's request, problem, or question.
- **Purpose:** To manage customer service and support issues, ensuring they are addressed and resolved.

Demo: A Day in the Life

The Scenario

We'll follow a real-world scenario, from a new inquiry from "Lozier Corporation" to a coordinated, multi-departmental partnership.

The Characters

- **Kevin Murphy:** VP at Lozier Corporation
- **Ryan Bumstead:** MCC Employer Hub Lead
- **Laura Price:** MCC Foundation

Demo Step 1: The First Inquiry

Kevin Murphy from Lozier sends his first email to Ryan. This is a familiar, siloed conversation. The difference is that this time Salesforce Einstein Activity Capture logs the email directly into Salesforce.

From: Kevin Murphy (kmurphy@lozier.com)

To: rdbumstead@mail.mccneb.edu

Subject: Lozier - Corporate Training

Hi Ryan,

I'm looking into options for some professional development for our front-line managers. We're interested in a 2-day workshop on team leadership and conflict resolution...

From: **Kevin Murphy**

✓ To: **Ryan Bumstead**

10:29 AM | Today

CAUTION: This email originated from outside Metropolitan Community College. Do not click links or open attachments unless you recognize the sender and know the content is safe. **Do not click on any link and fill any request asking for your MCC username and password at any time. MCC will never ask you for your username and password over email.** Forward suspicious items to reportsuspicious@mccneb.edu or use the "Report Suspicious" button.

Hi Ryan,

I'm looking into options for some professional development for our front-line managers. We're interested in a 2-day workshop on team leadership and conflict resolution.

Are you the right person to talk to about setting up some corporate training for a group of about 30 employees?

Thanks,

Kevin Murphy VP of Operations Lozier Corporation

Demo Step 2: Email Exchange

Ryan replies and after an exchange with Kevin a call is planned.

- Einstein Activity Capture logs all of the emails, and in this case all associated with the same email string.
- It's linked to the "Kevin Murphy" Contact.
- It's linked to the "Lozier Corporation" Account.

The screenshot displays the Einstein Activity Capture interface. At the top, there are two tabs: "Activity" (selected) and "Chatter". Below the tabs are four icons representing different activity types: a green icon with a checkmark, a teal icon with a speech bubble, a purple icon with a calendar, and a grey icon with an envelope. To the right of these icons, there are filters: "Filters: Within 2 months • All activities • All types" and a settings gear icon. Below the filters are links: "Refresh", "Expand All", and "View All". A section titled "Upcoming & Overdue" shows "No activities to show." and a prompt: "Get started by sending an email, scheduling a task, and more." Below this is a date selector for "November • 2025" and a "This Month" button. The main content area shows an email thread titled "Re: Lozier - Corporate Training" with a timestamp of "10:36 AM | Today". The thread includes a message from "Kevin Murphy" to "Ryan Bumstead" and a reply from "Ryan Bumstead" to "Kevin Murphy". The reply contains the text "Hi Kevin, Great to hear from you. You've come to the right place. I manage ...". Below the reply is another message from "Kevin Murphy" to "Ryan Bumstead" with a timestamp of "10:29 AM | Today". The thread is marked as "CAUTION: This email originated from outside Metropolitan Community Col...".

Activity Chatter

Filters: Within 2 months • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

November • 2025 This Month

Re: Lozier - Corporate Training 10:36 AM | Today

Kevin Murphy sent an email to Ryan Bumstead

> Kevin Murphy sent an email to Ryan Bumstead 10:36 AM | Today

CAUTION: This email originated from outside Metropolitan Community Col...

> Ryan Bumstead sent an email to Kevin Murphy 10:33 AM | Today

Hi Kevin, Great to hear from you. You've come to the right place. I manage ...

> Kevin Murphy sent an email to Ryan Bumstead 10:29 AM | Today

CAUTION: This email originated from outside Metropolitan Community Col...

Demo Step 3: The Call

Ryan calls Kevin as planned, taking notes, and afterwards logs the call in Salesforce including the notes in the call comments. Ryan also creates the Corporate Training Opportunity.

Account

Lozier Corporation

Industry

Manufacturing

Academic Focus Area

Skilled Trades and Technical Sciences

Website

<https://lozier.com/>

Account Owner

Ryan Bumstead

Related

Details

We found no potential duplicates of this Account.

Cases (0)

New

Contacts (1)

1 item • Updated a minute ago

Contact Name

Title

Email

Phone

1

☐

Kevin Murphy

Plant HR Manager

ryanbumstead.employerhub@outlook.com

(402) 555-2101

View All

Opportunities (1)

1 item • Updated a minute ago

Opportunity Name

Stage

Amount

Close Date

1

☐

Lozier Corporation - Corporate Training

Value Proposition

\$10,000.00

11/24/2025

View All

The logged call is available on the Activity Timeline for both Kevin Murphy and the Lozier Corporation.

Activity

Chatter

Filters: Within 2 months • All activities • All types

Refresh

Expand All

View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

November • 2025

This Month

Call

Today

You logged a call with [Kevin Murphy](#)

Name

[Kevin Murphy](#)

Description

Had a great initial call with Kevin Murphy following his email. We discussed his need for corporate training, and I outlined the process for him. I also introduced him to our new Employer Form on the website to help streamline any future, separate requests he or his colleagues might have.

Key Discussion Points:

Corporate Training Need: Kevin confirmed his email request. He is looking for a leadership and conflict resolution workshop for a group of approximately 30 front-line managers. His ideal timeline is Q1 2026.

MCC Solution: I confirmed that our Workforce Solutions team is the perfect fit for this. I let him know that I've logged his request in our new system and will be creating an official Opportunity to track it.

Re: Lozier - Corporate Training

10:36 AM | Today

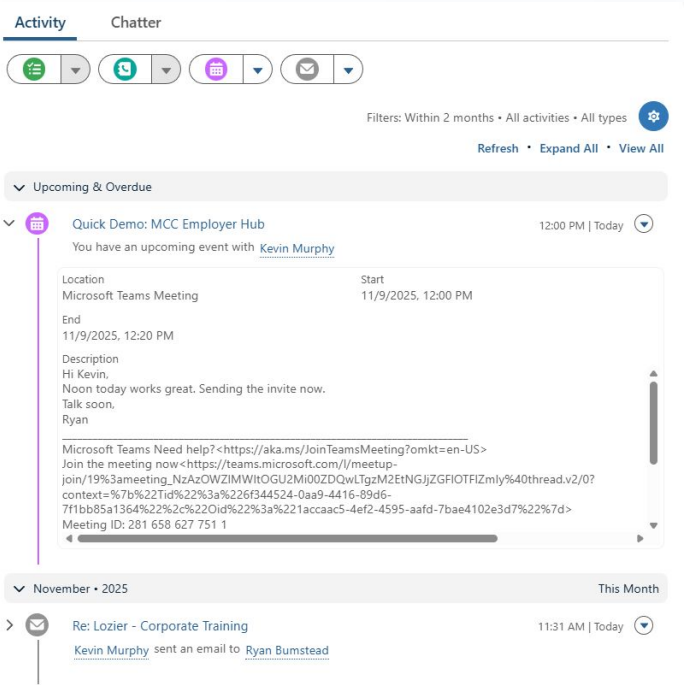
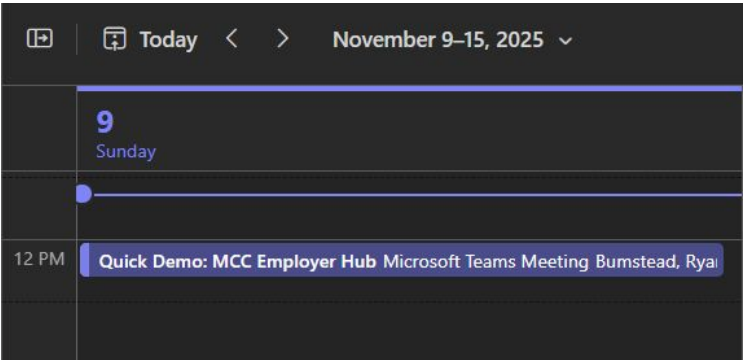
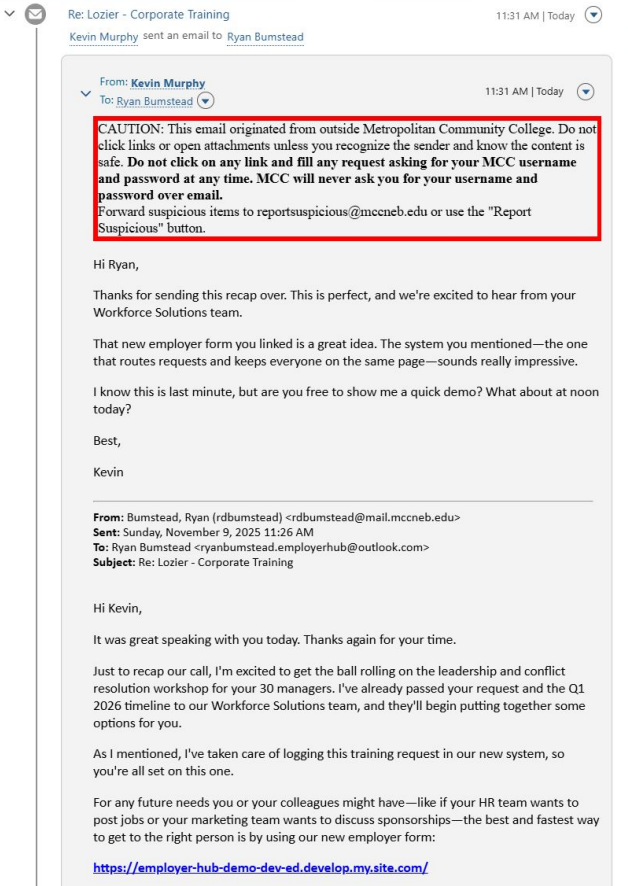
[Kevin Murphy](#)

sent an email to [Ryan Bumstead](#)

Demo Step 4: The Demo

Ryan sends a call summary to Kevin who is interested in a demo of the Employer Form.

Ryan schedules the Demo as a Microsoft Teams meeting directly in the Microsoft Teams application which is captured automatically just like the emails.



Demo Step 5: Form Submission

Kevin uses the new website form for his next request (sponsorship & Job Posting). This automatically creates two Cases and assigns them to the Skilled Trades and Technical Sciences queue.

Employer Hub

* First Name

Kevin

* Last Name

Murphy

Title

Plant HR Manager

* Email

ryanbumstead.employerhub@outlook.com

* Phone

4025552101

* Business Name

Lozier Corporation

* Business URL

https://lozier.com/

What is your primary industry sector?

Manufacturing

How can we help you?

☐ Scholarships

☒ Sponsorships

☐ Corporate Training

☐ Career Event

☐ Advisory Board

☐ Donation

☒ Job Posting

☐ Direct Hire

☐ Employee Training

Next

Demo Step 6: The Automated Handoff

Laura Price (Foundation) receives an email about the creation of the two Cases. Laura logs into Salesforce and sees the new Cases in the the Skilled Trades and Technical Sciences queue on Laura’s home page.

Lozier Corporation - 2 Cases Created Inbox x

Employer Hub bumsteadryan@gmail.com [via](#) x5l8rx1o1h8kyaqe.l8uodu2.g5-gqwueai.ind168.bnc.s... 12:24 PM (21 minutes ago) to me ▾

Good day!

You have received new cases in your queue.

Thank you,

Ryan

OperationsExecutive

Dashboard

Operations Dashboard

As of Nov 9, 2025, 12:36 PM Viewing as Ryan Bumstead

OpenRefreshSubscribe

New Inquiries by Queue

Sum of Open

22

1192

Case Owner

Health Professions

Skilled Trades and Technical Sciences

Transfer

View Report (New Inquiries by Queue)As of Nov 9, 2025, 12:36 PM

Neglected Inquiries

Case Owner	Account Name	Subject	Date/Time O...	Age
Health Professions	Children's Hospital + Medical Center	Children's Hospital + Medical Center - Corporate Training	11/2/2025, 8:49	160
Health Professions	Children's Hospital + Medical Center	Children's Hospital + Medical Center - Career Event	11/2/2025, 8:49	160
Health Professions	Children's Hospital + Medical Center	Children's Hospital + Medical Center - Advisory Board	11/2/2025, 8:49	160
Health Professions	Children's Hospital + Medical Center	Children's Hospital + Medical Center - Direct Hire	11/2/2025, 8:49	160
Health	Children's Hospital + Medical	Children's Hospital + Medical Center - Employee	11/2/2025, 8:49	160

View Report (Neglected Inquiries)As of Nov 9, 2025, 12:36 PM

Accounts

Cases

Contracts

Opportunities

TasksQueueOpportunitiesAccounts

Cases

Skilled Trades and Technical Sciences

2 items • Sorted by Case Number • Filtered by Skilled Trades and Technical Sciences • Updated a few seconds ago

NewAcceptChange OwnerPrintable ViewAssign Label

Search this list...

	Case Number	Contact Name	Subject	Status	Priority	Date/Time Opened	Case Owner Alias
1	00001138	Kevin Murphy	Lozier Corporation - Sponsorships	New	Medium	11/9/2025, 12:24 PM	Skilled Trades and Technical Sciences
2	00001139	Kevin Murphy	Lozier Corporation - Job Posting	New	Medium	11/9/2025, 12:24 PM	Skilled Trades and Technical Sciences

Demo Step 7: Activity History

Laura opens the Lozier Account and sees:

- Ryan's emails with Kevin from yesterday.
- The "Corporate Training" Opportunity.

She knows the full history before emailing.

ActivityChatter

Filters: Within 2 months • All activities • All types

Refresh

Expand All

View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

November • 2025This Month

>

Lozier Corporation - 2 Cases Created

12:24 PM | Today

bumsteadryan@gmail.com sent an email to ryanbumstead.employerhub@gmail.com

>

Quick Demo: MCC Employer Hub

12:00 PM | Today

Ryan Bumstead had an event with Kevin Murphy

>

Re: Lozier - Corporate Training

11:31 AM | Today

Kevin Murphy sent an email to Ryan Bumstead

>

Call

Today

Ryan Bumstead logged a call with Kevin Murphy

Account

Lozier Corporation

Industry

Manufacturing

Academic Focus Area

Skilled Trades and Technical Sciences

Website

https://lozier.com/

Account Owner

Ryan Bumstead

Related

Details

We found no potential duplicates of this Account.

Cases (2)

2 items • Filtered by Status • Updated 31 minutes ago

Case

Contact Name

Status

Subject

Case Owner Alias

1

00001138

Kevin Murphy

New

Lozier Corporation - Sponsorships

Skilled Trades and Technical Sciences

2

00001139

Kevin Murphy

New

Lozier Corporation - Job Posting

Skilled Trades and Technical Sciences

View All

Contacts (1)

1 item • Updated 31 minutes ago

Contact Name

Title

Email

Phone

1

Kevin Murphy

Plant HR Manager

ryanbumstead.employerhub@outlook.com

(402) 555-2101

View All

Opportunities (1)

1 item • Updated 31 minutes ago

Opportunity Name

Stage

Amount

Close Date

1

Lozier Corporation - Corporate Training

Value Proposition

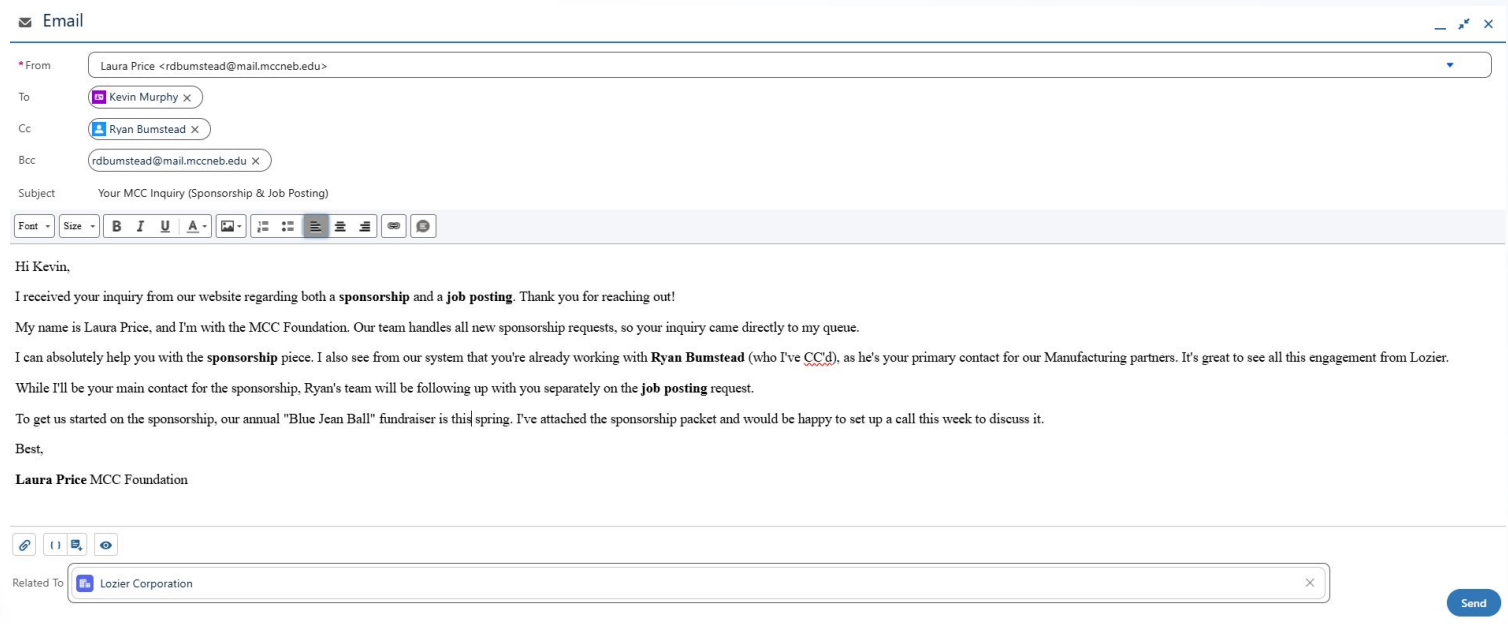
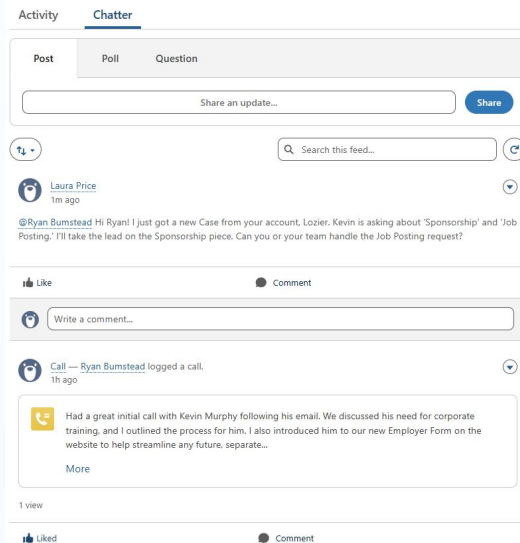
\$10,000.00

11/24/2025

View All

Demo Step 8: Information Inquiry

Laura needs additional information from Kevin about the Sponsorship. Laura is responsible for Sponsorships, but not Job Postings and drafts an email to Kevin directly in Salesforce. Laura also posts internally on Chatter to inform Ryan about taking the Sponsorship.



Demo Step 9: Sponsorship

Laura sends the email to Kevin to get the additional details about the Sponsorship, then converts the Case to an Opportunity using a custom automated process which is easily accessible on the Case record. After entering the new required details, Laura clicks “Next” and the process is completed. The case has been automatically closed and a new Opportunity for Sponsorship has been added.

Case

Lozier Corporation - Sponsorships

Priority

Medium

Status

New

Case Number

00001138

Feed

Related

Convert to Oppor...

Fulfill Request

Log a Call

* Close Date

Nov 24, 2025

Amount

\$10,000.00

* Stage

Negotiation/Review

Next

Opportunities (2)

2 items • Updated a few seconds ago

Opportunity Name	Stage	Amount	Close Date	
1 Lozier Corporation - Corporate Training	Value Proposition	\$10,000.00	11/24/2025	▼
2 Lozier Corporation - Sponsorships	Negotiation/Review	\$10,000.00	11/24/2025	▼

View All

Demo Step 10: Sponsorship Planned

Laura works with Kevin to get the Sponsorship Agreement reviewed and completed and assigns the Opportunity to the “Close Won” status which triggers a task via an automation to Laura as a reminder to create a Contract record. Laura receives the email reminder and creates the Contract record by pressing the custom “Create Contract” button on the Opportunity then makes the Task “Complete”.

TasksQueueOpportunitiesAccounts

Tasks

Open Tasks

New TaskAssign Label

1 item • Sorted by Due Date • Filtered by My tasks - Closed, Recurring Parent, Due Date • Updated a few seconds ago

Search this list...

Subject

Related To

Due Date

Status

Priority

Assigned ...

Last Modified Date/Time

Last Modif...

1

Create Contract

Lozier Corporation - Sponsorships

11/11/2025

Not Started

Normal

lpric

11/9/2025, 2:00 PM

lpric

Create Contract

Start Date

Nov 24, 2025

* Contract Term (Months)

12

Contract Type

Sponsorship Agreement

Amount

\$10,000.00

Upload Contract

Upload Files

Or drop files

Next

Contracts (1)

New

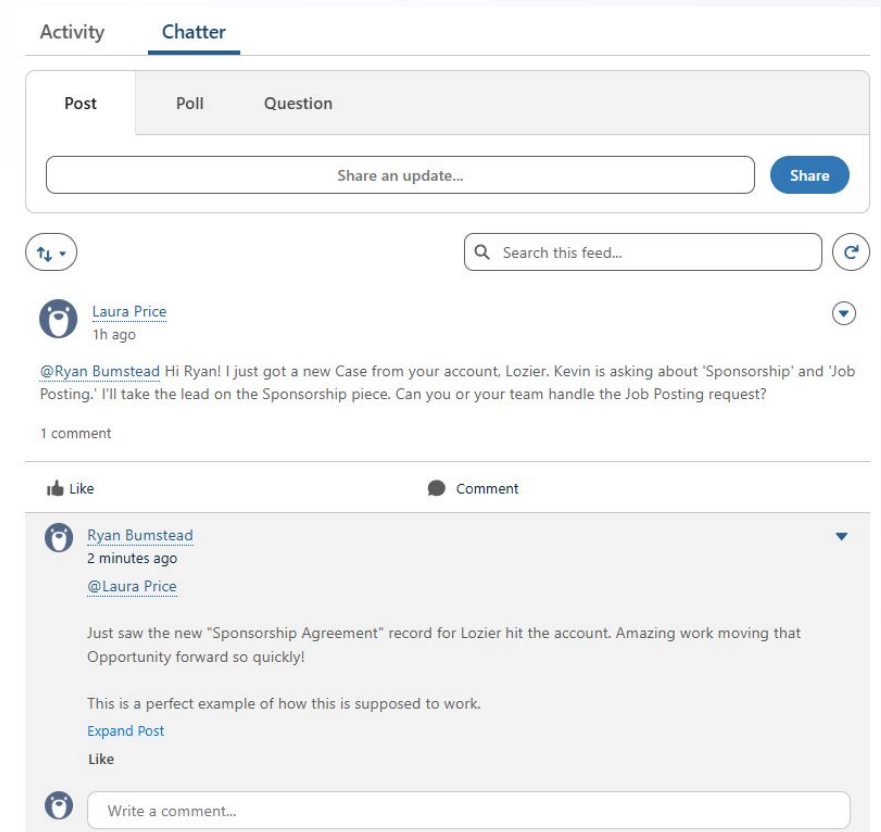
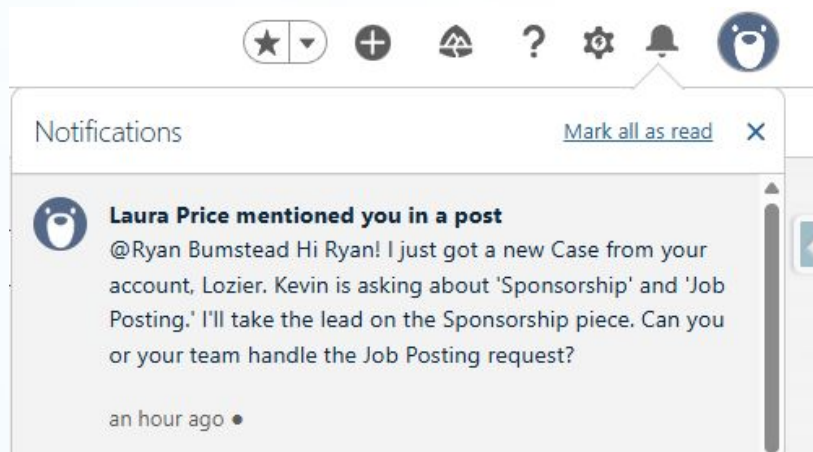
1 item • Updated a few seconds ago

	Contract Number	Contract Start Date	Contract End Date	Contract Type	Amount	
1	<div><div></div>00000127</div>	11/24/2025	11/23/2026	Sponsorship Agreement	\$10,000.00	

View All

Demo Step 11: Notification and Chatter

Ryan was notified that he was mentioned in a new Chatter post. He checks the post and then sees the Sponsorship Case closed, the Sponsorship Opportunity worked, and a new Sponsorship Agreement Contract added to the Lozier Account. Ryan sends a thank you to Laura and then sends an email to Kevin to get the details for the Job Posting.



Demo Step 12: Job Posting

Kevin sends Ryan the Job Posting details and Ryan fulfills the Job Posting Case by creating the Job Posting record straight from the Case by using a custom automation. Ryan then closes the case as Kevin only requested to add a single Job Posting at this time.

Case

Lozier Corporation - Job Posting

Priority

Medium

Status

New

Case Number

00001139

Feed

Related

Convert to Oppor...

Fulfill Request

Log a Call

Job Posting Name

Senior Buyer

Start Date

Nov 17, 2025

End Date

Dec 31, 2025

Link

https://lozier.wd5.myworkdayjobs.com/en-US/lozier_careers/job/Omaha-NE/Senior-Buyer_JR101717?locations=a7f1b2e521c5100cc9c4a41a14e90000

Wage

\$84,232.00

Status

Full Time

Classification

Exempt

Previous

Next

Demo Step 13: The Result

Before: The "Old Way"

"Who at Lozier is Kevin?"

"Can you forward me that email?"

"Ryan, you need to talk to Laura."

"Who is handling their Sponsorship?"

(Chaos)

After: The Hub

Everyone can see all of their engagements on one screen:

Ryan owns the Training Opportunity and Job Posting.

Laura owns the Sponsorship Opportunity.

(Clarity)

The 360-View: The Result in Action Part 1

The account object contains all of the communication elements such as the Activity Timeline and Chatter enabling cross-functional team collaboration and full-scope understanding of communications with the Business Partner.

Activity Timeline

The Activity Timeline interface shows a list of activities for a specific account. At the top, there are tabs for 'Activity' and 'Chatter'. Below the tabs are icons for different activity types: a green circle with a plus sign, a blue circle with a speech bubble, a purple circle with a document, and a grey circle with an envelope. A filter bar indicates 'Filters: Within 2 months • All activities • All types' with a settings gear icon. Below the filter bar are links for 'Refresh', 'Expand All', and 'View All'. The main content area shows a list of activities for 'November • 2025'. The activities are listed in a vertical timeline format, with each activity having a date and a dropdown arrow. The activities include: 'Create Contract' (Today), 'Reminder: Create Contract for Lozier Corporation - Sponsorships' (2:00 PM | Yesterday), 'Your MCC Inquiry (Sponsorship & Job Posting)' (1:36 PM | Yesterday), 'Lozier Corporation - 2 Cases Created' (12:24 PM | Yesterday), 'Quick Demo: MCC Employer Hub' (12:00 PM | Yesterday), 'Re: Lozier - Corporate Training' (11:31 AM | Yesterday), and 'Call' (Yesterday).

Chatter

The Chatter interface shows a feed of posts and updates. At the top, there are tabs for 'Activity' and 'Chatter'. Below the tabs are icons for different activity types: a green circle with a plus sign, a blue circle with a speech bubble, a purple circle with a document, and a grey circle with an envelope. A filter bar indicates 'Filters: Within 2 months • All activities • All types' with a settings gear icon. Below the filter bar are links for 'Refresh', 'Expand All', and 'View All'. The main content area shows a list of posts and updates. The first post is by 'Laura Price' (20h ago) and is titled '@Ryan Bumstead Hi Ryan! I just got a new Case from your account, Lozier. Kevin is asking about "Sponsorship" and "Job Posting". I'll take the lead on the Sponsorship piece. Can you or your team handle the Job Posting request?'. Below the post are links for '1 comment' and '1 view'. The second post is by 'Ryan Bumstead' (20 hours ago) and is titled '@Laura Price Just saw the new "Sponsorship Agreement" record for Lozier hit the account. Amazing work moving that Opportunity forward so quickly! This is a perfect example of how this is supposed to work. Expand Post Like'. Below the post are links for 'Write a comment...' and 'Like'. The third post is by 'Call — Ryan Bumstead logged a call.' (22h ago) and is titled 'Had a great initial call with Kevin Murphy following his email. We discussed his need for corporate training, and I outlined the process for him. I also introduced him to our new Employer Form on the website to help streamline any future, separate... More'. Below the post are links for '3 views', 'Like', and 'Comment'.

The 360-View: The Result in Action Part 2

The Account also contains all of the related records associated with the Business such as the Cases, Opportunities, Contracts, Job Posting, etc.

Case, Opportunities & Contract

Account

Lozier Corporation

Industry

Manufacturing

Academic Focus Area

Skilled Trades and Technical Sciences

Website

https://lozier.com/

Account Owner

Ryan Bumstead

Related

Details

We found no potential duplicates of this Account.

Cases (0)

New

Contacts (1)

1 item • Updated 6 minutes ago

Contract Name

Title

Email

Phone

1

☐

Kevin Murphy

Plant HR Manager

ryanbumstead.employerhub@outlook.com

(402) 555-2101

View All

Opportunities (2)

2 items • Updated 6 minutes ago

Opportunity Name

Stage

Amount

Close Date

1

☐

Lozier Corporation - Corporate Training

Ryan's Opportunity

Value Proposition

\$10,000.00

11/24/2025

2

☐

Lozier Corporation - Sponsorships

Laura's Opportunity

Closed Won

\$10,000.00

11/9/2025

View All

Contracts (1)

1 item • Updated 5 minutes ago

Contract Number

Contract Start Date

Contract End Date

Contract Type

Amount

1

☐

00000127

11/24/2025

11/23/2026

Sponsorship Agreement

\$10,000.00

View All

Job Postings & Other Records

Contracts (1)

1 item • Updated 6 minutes ago

Contract Number

Contract Start Date

Contract End Date

Contract Type

Amount

1

☐

00000127

11/24/2025

11/23/2026

Sponsorship Agreement

Contract

\$10,000.00

View All

Sponsorships (0)

New

Program Engagements (3)

3 items • Updated 3 minutes ago

Program Engagement

Program Link

Engagement Type

1

☐

PE-0001

Test Training Program November 2025 FOC E

Career Placement Program

2

☐

PE-0002

Test Training Program November 2025 FOC E

Guest Speaker

3

☐

PE-0003

Career Fair November 2025

Career Fair

View All

Letters of Support (0)

New

Job Postings (3)

3 items • Filtered by Active • Updated a few seconds ago

Job Posting Name

Hourly Wage

Status

Classification

Start Date

End Date

1

☐

Senior Technical Data Analyst

\$43.27

Full Time

Exempt

10/31/2025

12/1/2025

2

☐

Machine Operator Specialist (1st Shift)

\$24.49

Full Time

Non-Exempt

10/31/2025

11/28/2025

3

☐

Senior Buyer

\$40.50

Full Time

Exempt

11/17/2025

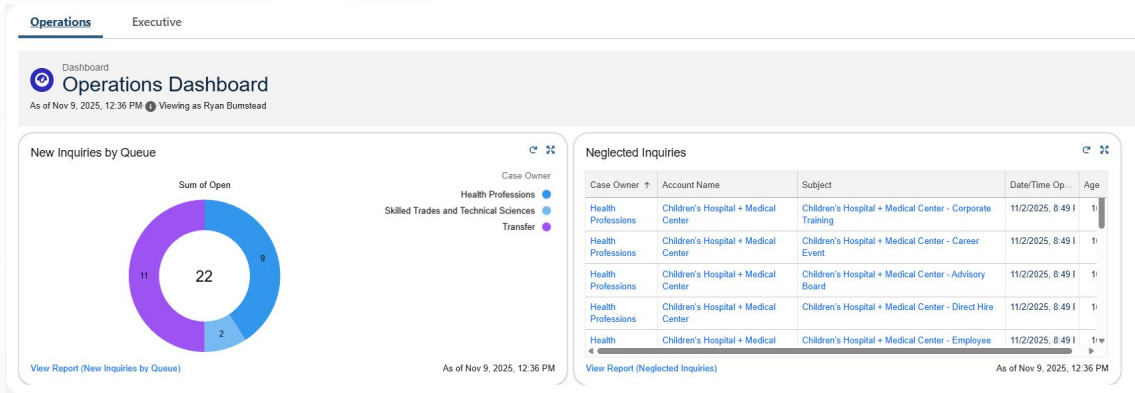
12/31/2025

View All

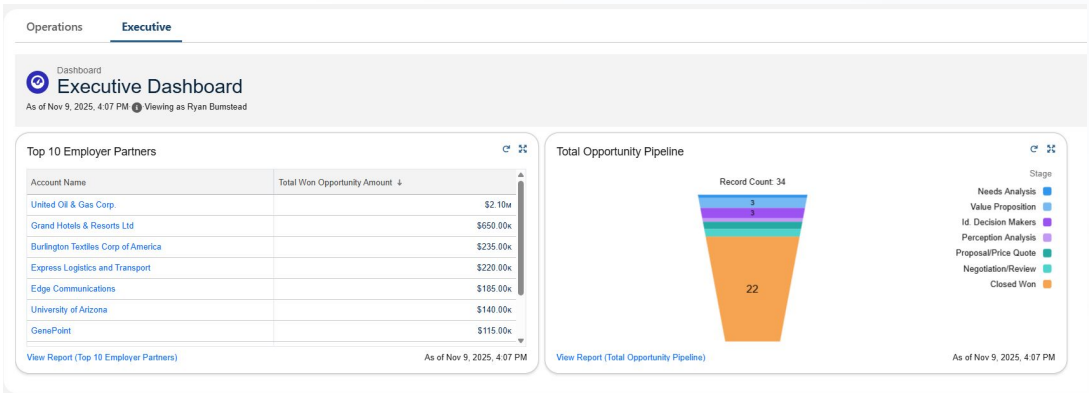
Operations and Executive Dashboards

Custom reports and dashboards focused on the things that matter, providing clarity and accountability for all. All information is reportable, this is just a start.

Operations



Executive



How This Aligns to the Rubric

User Experience: Solves all internal staff needs, providing the 360-degree view.

Communication & Notifications: Solved with EAC, Queues, and automated Email Alerts.

Reporting & Analytics: Creates the central repository for all partner data and reporting.

Questions?

Email: Bumsteadryan@gmail.com