# Education Cloud Case Study

## Use Case 01

| Major Challenges | Scope of Project | Outcome |
| --- | --- | --- |
| Inability to track and maintain the Alumni enquiry pipeline | 360 view of the alumni and related information on a single platform | Fast track on boarding of the business to the Salesforce Platform – Get business teams up and running in a few short weeks |
| Inability to track the Student’s (Alumni) journey and trace their participation status during college alumni events | Streamline newsletter distribution to the alumni and prospects | Greenfield implementation of best practices on how to best leverage the Salesforce platform to support the College’s business and processes |
| Limited Integration and communication tools such as Emails, Spreadsheet etc. | Define the relationship between current and former constituents | Focused and user-centric training sessions with hands-on examples, allowing smooth transition of your teams to the Salesforce platform and guaranteeing high adoption rates |
| Manual Entry of Details (business Alumni Contact) using Spreadsheets | Record the academic achievements of the student | Implementation of best practice delivery models to ensure better usability and data quality |
| Lack of proper system to define the Academic Achievements of Alumni | Accounts Management (Academic Program, Business Organization, Educational Institution, Household Account) | Creation of standard Data load templates to upload details about campaigns and campaign members |
| No system to store information regarding an Alumni’s association with external organisation | Contact Management (Alumni, Students and Others, Automatic Relationship, Attribute, Social Media Profiles) | |

## Use Case 02

### Major Challenges

The client manually tracked and maintained customer accounts, contact, lead, and opportunity including product and finance-related data.

They had no way of distinguishing between the different types of accounts, which had different business processes.

The client's ability to communicate within their own team was sub-optimal.

The client's ability to track the communication between themselves and their clients was also sub-optimal.

There was no way of tracking the opportunity through its stages.

### Scope of Project

Lead Management:

- Manual Creation
- Custom Field Creation
- Source of Leads
- Lead Record Types
- Lead Duplicate Management
- Lead Stages and Conversion

Account Management:

- Account page layout configuration
- Creation of record types
- Account Duplicate Management

Contact Management:

- Contact Configuration
- Contact Duplicate Management

Opportunity Management:

- Opportunity Tracking and Progress
- Custom Field Creation
- Opportunity Stages

Course Management:

- Page layout configuration on the Account Object
- Creation of custom fields

### Outcome

The client now has a complete overview of their customer journey, right from the moment potential customers are leads to the time they successfully convert into Accounts, Contacts, and Opportunities. Furthermore, the customization of their Salesforce Education Cloud has drastically reduced the time spent on manual data entry, thanks to the intuitive design of standard Salesforce objects.

Reports were also optimized. The introduction of different record types allowed the client to categories their various business units and accurately measure their performance.