Experience Cloud Case Study

Use Case 01

Major Challenges	Scope of Project	Outcome
Need for a platform to manage huge data of student, faculty, staff and campuses.	Student and teacher portal have bought them closer and made educa4on process more interac4ve using advanced technology	31% of increase in Donor Reten4on Rate (2019)
Need for a flexible mechanism to track the progress of the students to give scholarships	Student can access class notes any4me and they won't miss the important class lectures even if they are on leave.	48% of increase in Cons4tuent Conversion (2019)
Need for a mechanism to track attendance for faculty and student.	Enrollment process of students has become easier with various salesforce automa4ons	31% of decrease in Service Costs (2019) *
Need for ability to configure & send emails based on segmented data stored within client's salesforce instance	Facul4es and staff can use the portal to apply for leaves and access other necessary informa4ons	
Need for elimina1ng the extensive external notes, spreadsheets and many elements of manual data entry	Attendance is now well managed by the customized attendance tracking system	

Use Case 02

Major Challenges	Scope of Project	Outcome
The firm was unable to streamline processes of customer support.	Used Experience Builder to configure and customize Direct Books home page for community portal to connect with external users and partners in a unified platform.	Creating Direct Books community portal help customers login easily and provide and obtain information directly.
Disorganized case management and routing of cases.	Implementing sales enablement component with CRM led to align sellers to what buyers want and need in the buying process.	Community portal helped firm to connect with people of outside world who are key to business processes, all together in one place.
Loss of time because of late allocation of necessary data due to lack of tools.	Product filters were set up to select when searching for types of products on enablement record.	Allowed sales team to easily access needed data and collaborate in real-time to close more deals.
Ineffective data monitoring and buying processes.	Web to cases functionality was set up to gather buyer and seller information directly from Direct Books community portal through enablement request and automatically generated new and multiple cases (in case of multiple sellers) within salesforce.	Enhanced case management led to cutting support costs and saved time.
The firm was unable to obtain financial and sales information in order to better serve customers.	Custom case lifecycle was defined for the Direct Books such as new, open, more information, pending, escalated, confirmation and closed.	Improved digital customer experience which led to better customer relationships and satisfaction

Major Challenges	Scope of Project	Outcome
Difficulties in understanding Yembo API.	Convert Standard functionalities into custom components to reduce manual client actions.	Highly customized components to reduce customer efforts
Integration was difficult Through LeadTrax and Yembo	Integration with LeadTrax to communicate so that it can fetch opportunity data from salesforce and push the updated records	Two-way Integration with Lead Trax to send and receive updated opportunity records.
	Integration with Yembo API to send contact details and get updated opportunity status.	Two-way Integration with Yembo to send contact details and get updated opportunities.

Cloud Certitude