Intro:

This is a qualitative and quantitative analysis report evaluating the optimizations made in the DigitLearning School application on Salesforce. It consists of 2 main parts. The first part evaluates the improvements of the data model, the associated automations and how these solve key problems faced by the sales reps of the school. The second part addresses how the improvements in the first part form the ground for solving the issue of reporting which is crucial for sales directors, but also for the sales people.

Part 1

1st key issue - No Junction-Object

The primary issue found in the previous data model of the Digit Learning App is the lack of a junction object that linked multiple students to multiple trainings.

Solution implemented - Creation of the junction-Object (Register):

The main objective of the Register object is to link the Student and Training objects. The implementation of this Object allows us to resolve the majority of issues faced by key users of the DigitLearning App. The Register object consists of 3 custom fields:

1. Student: Master-Detail relationship.
2. Training: Master-Detail relationship.
3. Enrollment status: Picklist: Reporting on the status of the training activity related to the registration record.

Below is the new data model with the Register object:

After the implementation of the Register object Digit Learning has recorded 105 registrations including backdated registrations for previous courses and students. This number includes students who register for more than one training.

This is largely thanks to the **new bulk action feature which allows us to register multiple students** in one training at once. The time lost for registering one or more students has come

down from 30 minutes per student to **a maximum of 1-2 minutes** per student OR an entire group of already existing students! This while also making sure that there are no duplicates of the student record.

In the example below **the registration process of a new student takes 1-2 minutes**; The registration of a new student involves adding their new record to the Student object, associating them to a specific training and thereby automatically changing their status from prospect to active client.

	Edited By	Student: Student Number	Field / Event	Old Value	New Value	Edit Date
1	Thabit Hamror	S-0179-DL	Created.	-	-	30/01/2022 14:03
2	Thabit Hamror	S-0179-DL	Client Status	Prospect	Active client	30/01/2022 14:04
3	Thabit Hamror	S-0179-DL	PriorValue	-	Prospect	30/01/2022 14:04

Step 1 - 14:03 - Student created.
Step 2 - 14:04 - The student is associated with a specific training and their client status moves from Prospect to Active client.
Step 3- This step verifies Step 2 by recording the change of the status in a custom Student object field called PriorValue.

The creation of the junction object allows us to resolve 3 more key issues. These are:
a) The automation of student status change, b) The automation of counting down the available places in a training once a student is registered in it, and c) Automatic update and display of the number of trainings purchased by a student.

a) The automation of student status change

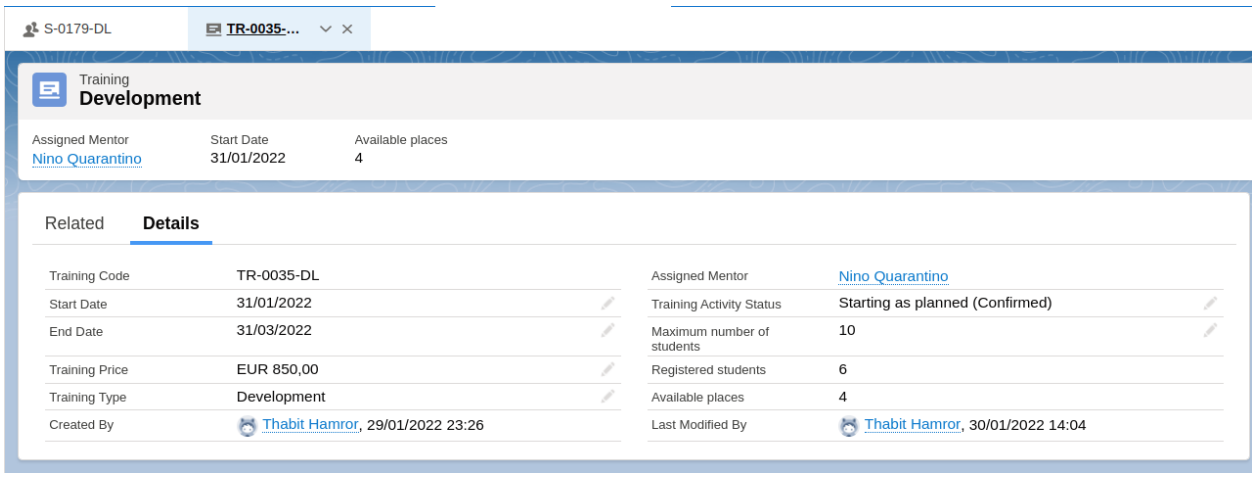
In the example above we have already covered the automation of student status change in the presentation of the newly added Register object. It is however important to emphasize that once a student is added to the database and without an association to any training, they are automatically assigned the Prospect status by default. Once they do register for a training which is 'Starting as planned' or 'Ongoing/Active' they are assigned the status of Active client. Once the training ends, the student is assigned the 'Former client' status. This is done using a process flow. Again this means **a salesperson saves at least 15 minutes per student** in the process of updating their business status.

b) The automation of counting down the available places in a training once a student is registered in it

Using the same example above (ref: Student Number) we can now look into how we solved the 2nd key issue. The last modification of the training (below) where this particular student

registered is the same time as the change of their status to active client (i.e. time of registration). The modification that took place in this Training record is the number of available places left to register in it. The custom number of available places field subtracts the Roll-Up Summary field value of registered students from the maximum number of students allowed to register in the training. This way the calculation of available places left is automatic.

This means **we are saving at least 30 minutes per student or any training availability instance.** Additionally we are avoiding duplication or miscalculation errors.

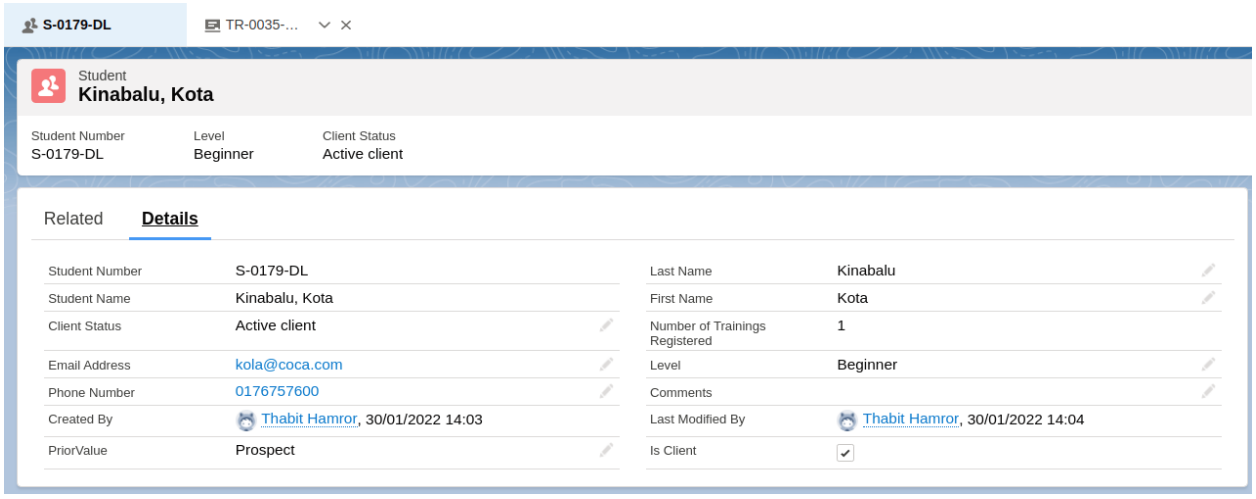


c) Automatic update and display of the number of trainings purchased by a student.

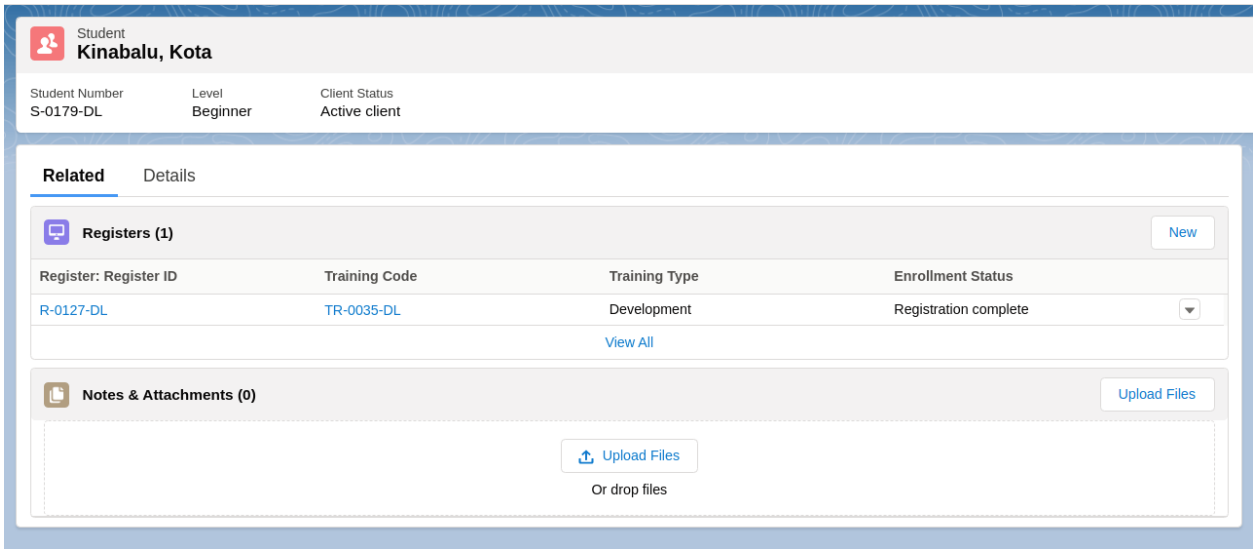
In the same way that we can calculate the number of available places by training, we can also calculate how many trainings a student has registered. Thanks again to the junction-object: Register.

The Roll-Up Summary custom field of the Training object labeled as ‘Number of Trainings registered’ sums up all the records of a student in the Register Object.

As such we can see in the screenshot below that the new student we created at 14:03 has their last modification done at 14:04, a minute later, or at the moment when their status changed to Active client, and their Number of Trainings Registered became 1.



We can also confirm this automated linking process by looking at the related view of this student:



Part 2

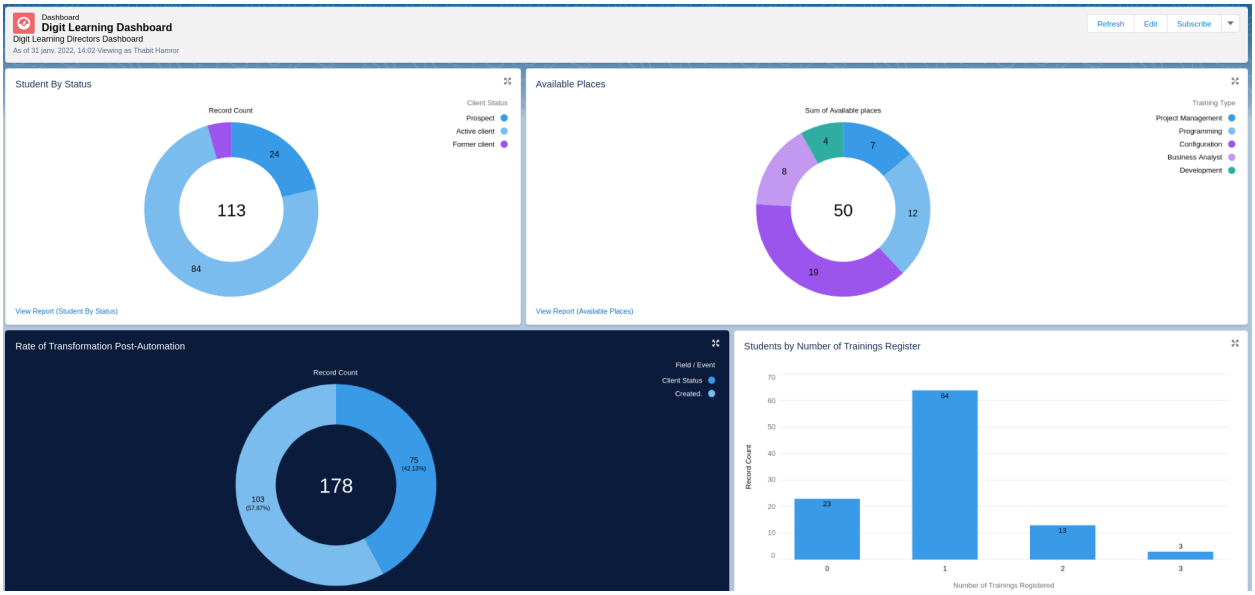
a) Reports for directors:

With that we can begin to see that the optimizations implemented save a tremendous amount of time for salespeople, the result of which can only be significant improvement in the performance of Sales and Marketing operations.

This brings us to the second part of our evaluation which concerns reporting. This issue is particularly pertinent for Sales directors who need to see how their sales teams are doing.

Good news is that the new data model we implemented allows us to report on the different relationships between our objects.

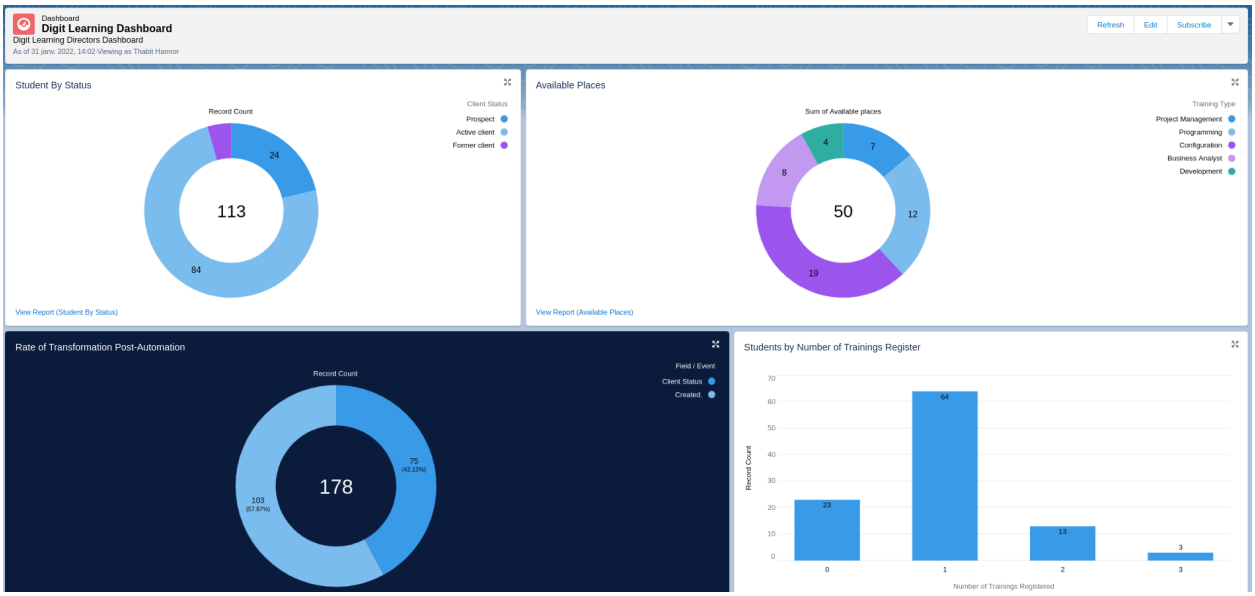
In the figure below are the different types of reports the new model can offer to sales directors.



In the top left we see the total number of students divided by the status. That's 113 students of whom 21% are Prospects, 74% are Active clients and 4.4% are Former clients.

Top right is another Pie Chart reporting the **number of available places per training discipline (Training type)**, considering only trainings that are starting soon or are Active/Ongoing. This type of report can inform directors as to which training could use more marketing, or which training disciplines are most in demand. As we can see the discipline of Development has the least availability of places among all courses with only 8% or 4 out of the 50 available seats the school has to offer in its different trainings. On the other hand, courses in Configuration have the most seats with 19 out of 50. Could this be because we are offering

more courses in Configuration than in Development? Has this to do with the availability of mentors? These are all good business questions to ask as a director.



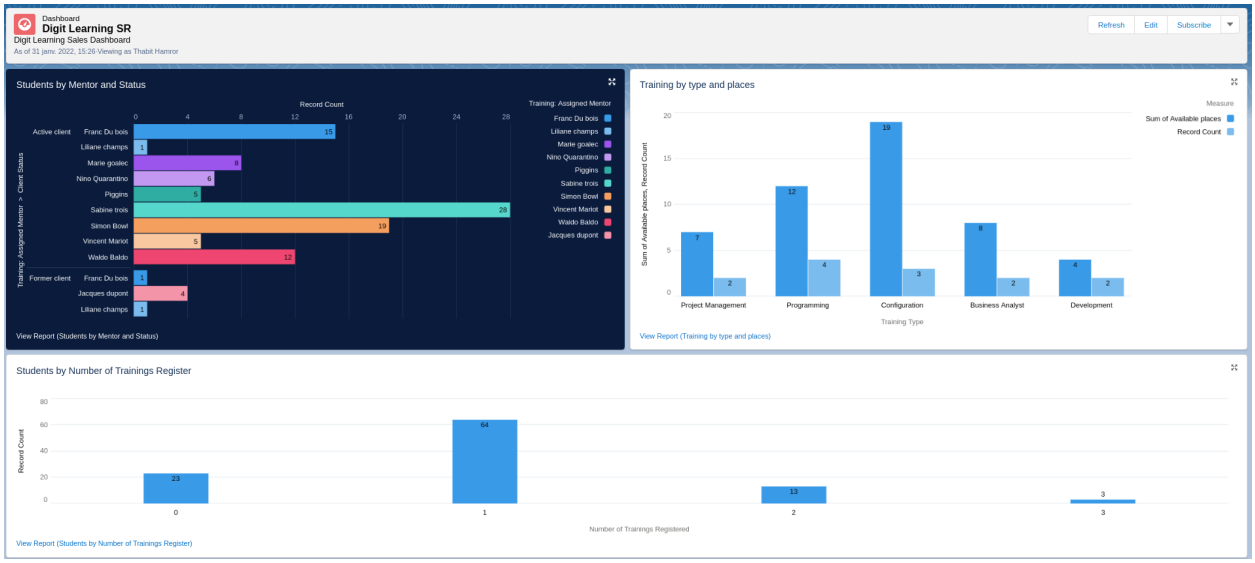
Bottom left we see the **rate of transformation after the implementation of the automations**. Before we get into reading this chart, a word must be said about how we were able to compare the rate before automation. Considering we had a low number of students with no historical tracking of their records, it was not possible to accurately depict the rate of transformation from prospect to active clients for this group. However, it was found that 50% of these students are former clients and the other 50% are prospects. This means that 50% of them have moved from the prospect status within an unknown period of time but the other half of them remained in the prospect status. Human error, duplicate records or the lack of automation could be the reason for why this group didn't move to the active client status, or why the former clients did not come back to register for more courses. In any case, the data we have from the school prior to automation is not insightful to work with. Even the 50% rate of transformation it reflects from what we know appears unreliable.

That said, in the bottom left chart we have a reliable 42% rate of transformation from prospect to active client status for all the students who were signed up after the automation. This is significant considering that this rate does not take into account multiple registrations of the same student. It only considers the creation of the new student record and the time they move to active client status. That is from 178 instances of record creation and modification, 75 are a transformation from prospect to active status.

This is why the chart on the **bottom right** of the figure is important. It shows the **number of students by number of registered trainings.** The majority of students (64) are registered in 1 training each, and 13 students are registered in 2 courses each. So far only a minority (3 students) are registered in 3 trainings each.

b) Reports for the salespeople

The sales team also needs to have an overview of their performance and the trainings the can offer to students. This is why part of the improvements included adding a dashboard for the sales team presenting to them the following information:



To the **top left,** the sales team can see **how the students are divided by mentor and client status.** In fact it gives them insight into the most in-demand mentor. At this stage it seems that Sabine Trois has the most number of Active client students, followed by Simon Bowl and Franc Du Bois. Jacques Dupont seems to have the most number of Former client students.

To the **top right,** the sales team can view **how many seats are available for each training type and how many trainings these seats are divided into**. So we can see that we have 19 seats available for Configuration courses distributed between 3 training offers. The 4 seats in development are available between 2 trainings offers.

Below this finally comes the same chart seen by directors and that is the number of students by the number of trainings registered.

Conclusion:

Overall, the optimisation of the Digit Learning App has centered around the creation of a junction object named the Register. The creation of this object improved the data model and consequently allowed for new automation opportunities in the App. Automation means increased efficiency which as a result entailed the improvement of sales and marketing performance. Most importantly, the new optimization of the app has also allowed us to report on the various relationships between our objects and to represent the performance of the sales team far more reliably.