DIGIT LEARNING

KEY USER INTERVIEWS

Context

Digit Learning is an online school that offers online training to its members.

Digit Learning offers multiple training courses, from kindergarten to university-level, as well as training in different professional fields.

Digit Learning has a revenue of EUR 390,000 for 2019 and is undergoing sharp growth with 375 employees working in sales teams, research and IT.

Interviews

Below are notes from interviews conducted with the different key users of Digit Learning in order to understand the problems encountered with the current version of the Salesforce application.

Interview with Harmony Capra, Director of Sales

Harmony has expressed the following difficulties during her daily use of the application:

- Harmony is not able to monitor the application metrics. She wants to have the following reports:
    - Report on the trainings with available places >0
    - Report grouping students by status
    - Report comparing the rates of transformation from prospect status into active client status before and after implementation of the automation.

Interview with Celia Fontaine, a sales representative in Harmony Capra's team

Celia expresses the problems encountered by salespeople and their working method. Below are the problems and desired improvements:

- The current data model allows the attachment of only one training to each student
    - Improved data model: adds the possibility of attaching several trainings to each student; for example, a student may have purchased several training courses. This change allows us to save about 30 minutes and will avoid duplicate registrations in Salesforce.

- The student's "Status" field is manually updated. This creates problems for us and takes a lot of time (around 15 minutes per student). Here are the rules to update the statuses:
  - When creating the "Student" profile, the status is "Prospect" by default.
  - When the first "Purchased training" is created, the status will be automatically updated to "Active Customer"
  - When the completion date of the Training expires, the status will be automatically updated to "Former Customer"
- Currently, each time the training is linked to a student, the "Number of available places" field must be manually reduced. This takes us a lot of time (more than 30 minutes per student) and sometimes we make input errors (between 10 and 15% errors). To solve this problem, we want this field to be automatically reduced when creating a "Purchased training" profile.
- We want the number of trainings purchased by each student to appear directly on their profile
- Currently there are no reports in Salesforce. The following reports are desired:
  - Report grouping students by mentor and by status
  - Report regrouping the trainings by type and showing the number of remaining places