

CUSTOMER STORY

In need of ongoing, customized managed services support? Allium helped a student-driven education services customer create a clear, simplified path for mentors to track student growth, valuable communications to promote student success, better automation processes within their Salesforce dashboard, and an integrated sales channel to optimize potential and current program partnerships.

 **TYPE OF COMPANY**
NATIONAL EDUCATION SERVICES ORGANIZATION










 **LOCATION**
MIDWEST, USA



CHALLENGE

The customer needed direct student-mentor communications, better partner management and more usability in Salesforce. Customer painpoints included:

-  Unable to capture and track student success/growth
-  Difficulty connecting directly with students (no integrated functionality)
-  Trouble improving student engagement and sense of community among students
-  No integrated workspace for mentors to access student profiles
-  Needed an app to serve as central control center for students to access
-  Unequipped to manage partner services sales process; no channel in place
-  Minimal depth and expertise around Salesforce functionality and capabilities

ACTION

Bridge the communication gap between students and mentors via Salesforce-enabled SMS messaging, more effective mentor workspace for better student growth monitoring, and an interactive community tool for students to connect with others in the program.

1 Research and source a complementary app in AppExchange to integrate with their Salesforce org

2 Set up SMS messaging in Salesforce to easily communicate with students

3 Create an integrated workspace for mentors to track student growth and manage outreach

4 Create sales channel for tracking and interacting with potential program partners

5 Build community space via Community Cloud to elevate student engagement

6 Provide training and best practices to maximize Salesforce functionality



RESULT

Allium created better, trackable communications with students and an integrated dashboard for mentors to track student progress. Our Managed Services practice has enabled more transparency for both student and mentor management, in addition to priming their services and partners to easily inherit their program structure.

COMMUNICATION



- Simplified processes
- Salesforce-integrated communications, including SMS messaging
- Active student engagement community:
 - maintain profiles
 - upload schedules
 - interact in forums

INTEGRATION



- Intuitive dashboards (*less clicks in Salesforce*)
- Salesforce-enabled SMS messaging and student community space
- Dedicated sales channel for current and prospective partners

MEASUREMENT



- Direct, trackable interactions between mentors and students
- Better, more accurate data and measurement tools
- Mentor workspace
 - More visibility and tracking capabilities of contacts, activity and progress



5-STAR CUSTOMER REVIEW

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