



One of the leading Educational Service Provider in the US leverages Community Portal to boost productivity

The client is the oldest operating institution of higher learning in California. Their educational programs span areas ranging from psychology to sustainable-energy engineering and from theatre arts to business analytics.

Challenge

The client was mainly using Salesforce to cater to the needs of their educational programs. The client was overwhelmed with manual tasks of building a learning cohort, which involves the on-boarding of new contacts to the community, and assigning them to appropriate Groups and learning paths. There was no proper process in place to track the progress of the learning modules assigned to Social entrepreneurs and to verify the completion status by the mentors. All these issues created mayhem in the administration process and the client wanted to automate the process. The client noticed that searches made using a specific community portal were not effective and wanted to customize the search functionality in the portal.

Solution

The client wanted to automate their Salesforce environment and approached DemandBlue for an ideal solution. Subsequent to thorough research on the client's existing Salesforce instance, and after a series of meetings with key stakeholders, the consulting team at DemandBlue built a strategic roadmap for the project. DemandBlue went ahead and automated their Learning Management System (LMS) in the Community Portal to speed up the on-boarding process and assigning of mentors and courses. We created a user-friendly dashboard that includes all the critical functionalities that could be accessed from a single interface. Also, implemented a configured Global Search to simplify search, provide restricted search based on user entities and offer advanced search functionalities to narrow down on search results.

Benefits

- **The Learning Management System (LMS) rendered the team super-efficient in the on-boarding of students, assigning mentors, and the distribution of courses.**
- **The complete automation of the client's Salesforce instance enabled them to save time by 35%.**
- **The new enhancements also improved productivity and CRM efficiency by a whopping 45%.**
- **The new data-rich and insightful dashboard allowed the team to track, assess, and review all cases in a single view.**
- **Improved search functionality provided the users with a global database to access and search data from.**
- **Customizations saved a lot of time and enhanced the user experience and satisfaction.**