



A leading flight pilot training group based in Maryland leverages Salesforce workflow automation and Salesforce integration to improve efficiency and productivity

The client is the largest community of pilots that provides GA Advocacy, Services, and Products for student pilots. Their products and services span the broadest-reaching media platforms and aviation technology and products that pilots use to travel the country and the world.

## Challenge

- As a part of their business, client was capturing a variety of data related to High school, teachers, students, opportunities, surveys, etc. Apart from Salesforce CRM, client was using FormAssembly to capture High School/Teacher information, Laserfiche for content management, Personify for workshop training, and Qualtrics Tool for capturing survey.
- The workflows executed through different apps and data residing in silos created a huge challenge in tracking the latest status updates, activities, relationships, or opportunities for the client. The ballooning manual work, decreasing productivity, task backlogs, communication gaps, and operational inefficiencies affected the client's future marketing activities.
- Hence, client wanted to reduce the number of external applications, reduce manual effort, and improve their overall operational efficiency without interrupting their business process.

## Solution

- The Demandblue Advisory Team did a thorough analysis of the client's existing workflow process and the various applications that were in use.
- We proceeded to tailor a custom solution that included app integrations with Salesforce, maximizing Salesforce's out-of-the-box features, introduce workflow automation, and centralizing the database to
  - Capture High School / Teacher information along with filled-in Form information directly in Salesforce
  - Initiate approval/agreement process, store the signed agreement files in Salesforce
  - Capture survey feedback from Teachers and opportunity renewals.
  - Strategic integrations with Salesforce that enabled 2-way data flow between Salesforce and other apps

## Benefits

- Previously, due to increased demand on manual effort and complexity involved in the processes, the AOPA team could only create around 75 curriculum entries per year. With our new system launch, within 30 days they were able to launch 90+ programs. This is a mind-boggling 1500% improvement in efficiency.
- Automatic two-way dataflow eliminated data errors and duplicity
- With the introduction of customizations and workflow automations, user adoption of Salesforce increased by 65%