



Leading Educational Service Provider Partners with DemandBlue to Revolutionize their Customer Community Portal

The client is one of the leading educational services providers to colleges, universities, corporations, businesses, higher education programs, professional training & certifications, test preparation, and student support services.

Challenge

The client's extensive on-boarding process for service providers and instructors was being managed through email, web forms, and other manual processes. With a continually growing clientele, they were often falling behind on requests. The client had difficulty in managing and tracking each request to a formal closure, leading to lots of hits and misses. Also, there was no mechanism in place to manage the RSVP and attendance of participants in the seminars. On-boarding process and protocol differ for different States and courses, and this increased the burden of the on-boarding team. Hence, the client wanted a robust and scalable automated process to handle the on-boarding, track requests, manage RSVP, and seminar registration and engagement.

Solution

The team at DemandBlue had an elaborate meeting with the stakeholders to quickly understand their individual business needs and devise a customized plan. Armed with a deep understanding of the client's business, DemandBlue proposed to streamline and automate the entire process by introducing the customer community portal.

- The community portal was built and configured with workflow automation to help the team close requests at a much faster rate.
- The case lifecycle report was configured based on the business hours and geography, to help the management get complete visibility of the process updates and turnaround time at each stage of the process.
- The User interface was customized through CSS to meet the brand guidelines and color theme of the client.
- Record types for case objects were appropriately configured in such a way that the status of the request was visible for the service providers.
- A QR code generation feature was set up along with Formstack web forms.
- The service providers were allowed access to track requests.

Benefits

- Automating processes and interactions with Salesforce helped the client in meeting and exceeding customer expectations as they evolve.
- The internal users were able to manage the process with minimal ambiguity as to the application, and the details were complete and accurate for business decisions.
- The Community portal was enhanced to drive productivity and user experience of the platform.
- Through the Community portal, the on-boarding team was able to complete 30% more requests than they were doing previously for the time frame.
- Clear visibility of case lifecycle made tracking easy, and customer experience improved significantly, minimizing the dropouts to 2% as compared to 27% previously.