

Streamlining administration and lead management for educational institutions



Fast track your **executive education programmes**

Educational institutions offering executive education programmes are deeply inclined towards increasing their outreach and streamlining their programme delivery by adopting innovative technology platforms. They are striving to increase collaboration between their faculty and clients, make strong connections with students and companies that sponsor them and design programmes that best fit the industry needs.

Our Solution

Bodhtree's Executive Management Programme Tracking solution offers institutions with a comprehensive view of prospects, students, faculty and alumni from a single interface.

Key highlights and features of our solution

- Maintains a record of faculty, curriculum, course content and its relevance to different audiences
- Analyzes programme data and helps the institution in customizing their programmes based on participants' feedback
- Enables the institution to deliver personalized marketing campaigns to increase outreach
- Streamlines admissions, outbound sales, programme delivery and marketing
- Unifies activity history, event attendance and other lead generation efforts on a single platform
- Tracks interactions between the institution and their prospects, students, alumni and donors
- Intuitive web interface allows access to diverse audiences and enhances user adoption, while reducing dependency on IT and lowering TCO
- Mobility and custom application development capabilities to seamlessly push information from the tool to the web, including class schedules, content, fees, etc.
- Enables individuals and companies to apply to the school online and add their human resources and employee details
- Students and administration can login and view past payments, invoices due, etc.

A Brief case study 1

A leading university in APAC region was juggling with administrative challenges and they needed a robust solution that could provide a unified view of their programme, faculty, students and alumni data and expand their outreach within corporates. Bodhtree leveraged Salesforce.com to automate their sales, marketing, programme delivery and post-delivery support processes. Additionally, we provided an online review mechanism of their programmes through a web portal (Microsite) that fetched data in real time from Salesforce. Midas, our proprietary ETLE tool was used to pull the programme data from Salesforce into the web portal. This solution has two major components: an internal facing secure and customized Salesforce instance that caters to sales, marketing and programme delivery teams at the university; and an external facing microsite that caters to customers - essentially companies, learning department individuals and participants.

Key Benefits of the Solution

- Seamless transition of programme information from sales to delivery while reducing cycle time and avoiding information loss that results in customer satisfaction
- Speedy invoicing, customer communication and feedback mechanism for faculty through surveys
- Optimization of constrained resources to arrive at key decisions based on revenue potential. For example: faculty and resource allocation to key accounts
- Alignment and optimization of recruiting efforts
- Greater focus on student services and success
- A connected campus: improved relationships with students, faculty, alumni and corporates

A Brief case study 2

A leading university faced critical challenges in managing their sales and administration processes, and monitoring operational efficiencies. At present leads were received from different sources – such as applications from web, emails, webinars, events, referrals, walk-ins, etc. The institution leveraged Salesforce.com to automate lead management and unify leads data on a single platform. The sales team was unable to track the applications received from the leads because the applications were captured in PeopleSoft. The institution also wanted to leverage their lead data to cross-sell and up-sell based on applicant preferences.

Midas, our proprietary ETL tool was used to integrate Salesforce.com with PeopleSoft, so that all applications received in PeopleSoft are updated in Salesforce. The objective was to identify whether the lead has applied for the programme and reduce the team's dependency on PeopleSoft for lead management. Further, we enabled email alerts to notify all users and stakeholders about the data transformation milestones.

Key Benefits

- Salesforce.com - PeopleSoft integration reduced application complexities
- Integration between systems enhanced productivity and optimized utilization of resources within Sales and Admissions
- Increased transparency in lead management; Helped in tracking lead conversions
- Enhanced data security
- AMC with Bodhtree allowed business users to focus on core business objectives

Process flow of Data transfer From Shared CSV/EXCEL to SFDC Database using Midas

