



SalesFix

Deakin University wanted to set up an automated, real time data integration between their Student Management system, Callista, and their Prospective Students Enquiry system, Salesforce, to allow prospects to be matched with Application or Offer and Enrolment records. The integration has resulted in reduced manual handling and has provided the Marketing team with accurate and up-to-date information about a person so they can tailor their campaigns accordingly.



KEY BENEFITS

AUTOMATED

Uploading records from Callista and then matching them to lead records in Salesforce meant a lot of manual work and no real-time conversion of leads to contacts once a person enrolled. This meant students may have been receiving communications that were irrelevant to them. With records now fully updated in Salesforce, the Marketing team has a reliable view of their target audience without the need to manually update records.

ACCURATE

With the two student systems now connected, the Marketing team can access updated, real-time information about the status of individual students at any given time. This has allowed them to deliver more targeted campaigns and better communications that are tailored to the individual.

HOLISTIC

In addition to being able to more effectively target their marketing, Deakin is also able to see the status of individual students. Longer term, this will form part of a larger student life-cycle process showing the status and interactions of a person from prospect through to alumni.



"SalesFix's knowledge of Salesforce and the overall engagement from the team was exceptional. From the initial proposal to the delivery, each step of the way was well communicated and collaborative."

Martin Brandwyk, Deakin University

THE CLIENT

Located in Victoria, Deakin University is one of Australia's leading tertiary education providers, employing approximately 14,000 staff and teaching over 60,000 students each year. Officially opened in 1974, Deakin now has five campuses, including the online Cloud Campus, that offer students world-class programs and a global approach to learning.

With a student-focused culture and a reputation for being accessible and friendly, it is no wonder Deakin ranks 231 in the Academic Ranking of World Universities, putting it in the top 1% of universities worldwide.

THE SITUATION

Prior to the integration, Deakin's Marketing team were manually uploading records from the Student Management system, Callista, and then matching them to lead records in Salesforce. This was time consuming and meant that records were never fully up-to-date in Salesforce. There was also no conversion of leads to contacts once a person enrolled.

With the Marketing team targeting multiple groups, for example to a prospect encouraging them to apply, or to a person who has applied encouraging them to enroll, it was important the correct messages reached the desired audience.



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THE CHALLENGE

Deakin had attempted to build and deliver this integration nine months earlier with another organisation but did not manage to succeed. Given this was such a complex piece of work to achieve, Deakin needed to be confident that SalesFix was able to pick up the previously unsuccessful project and not start again from scratch.

The scope was to deliver an automated, real time data integration making use of the existing MuleSoft setup. The key challenge was managing the data once it arrived in Salesforce:

- linking it to the correct student record
- identifying whether they were an existing lead or contact, and
- auto-converting leads that met specific criteria.

The logic was very complex. Learning from the previous attempt, we also knew that testing would be key to ensure the solution could deal with the pressures of large volumes of records.

At times, the wider Deakin business users had difficulty conceptualising what they needed and only understood once they saw it demonstrated. The project also had a very specific deadline to ensure the work didn't impact on the time-critical work of the recruitment and marketing team which is very seasonal.

RESULTS

The integration now allows Marketing to see the status of a person in real time and ensure their campaigns are targeted properly. This has meant their communications are correctly reaching individuals in the various levels of marketing.

Even though the integration has been successful, it is only one piece of a bigger puzzle. The next step will be for applications to be submitted directly into Salesforce leveraging this integration later in 2020. Beyond that, this integration will be part of a bigger student lifecycle piece of work.

THE SALESFIX SOLUTION

With engagement being so important, SalesFix ensured close collaboration between our team, the Deakin IT team and the Deakin business representatives through a series of workshops and meetings as part of the planning process.

The SalesFix team were also given access to the previous code that was implemented as well as any documentation to ensure we were able to pick up where the previous project had finished.

Given the issues with the previous attempt, the whole project team agreed upfront that quality was key and the only option was success. Testing, testing and more testing was key here, as were the measures that SalesFix built checked into the solution to ensure the implementation was successful.

THE OUTCOME

From the initial process of presenting the proposal to the final completion of the deliverables, this project was a true partnership with both the Deakin team and the SalesFix team working collaboratively throughout the entire engagement to achieve a common goal.

No major challenges were experienced with the project although some complex alterations in scope were made. These extended the length of the project and increased cost, however the collaborative approach meant everyone understood why these changes were necessary.

The new integration has increased efficiencies and strategy within the Marketing team, allowing for more targeted campaigns and better messaging to prospective and enrolled students.

