



Salesforce Community Cloud Implementation For A Global NGO Transforms Candidate Data Management

Client Overview

A global NGO - education, development and exchange programs provider needed a single platform to manage candidate data effectively and reduce data discrepancies. For over 90 years, the client has been designing and implementing programs in more than 160 countries. The client has an annual revenue of USD \$150 million with 1,000 employees overseeing 92 programs worldwide. We implemented and configured a Salesforce Community Cloud org and used Apex to create data management modules. This improved candidate data management and helped the client connect learners with the global education opportunities.

Business Needs

The client had to meticulously record the information of all the candidates applying for global courses. A learner's information, by and large, included the details of their parents who were contacted whenever a lucrative educational opportunity arose for their ward worldwide. But the client heavily relied on manual information management processes. Manual information management, in turn, was responsible for introducing glaring data discrepancies. Because there was no robust CRM in place, the process of fetching parent information in real time became time-consuming. The client basically needed a powerful system for:



Improving overall candidate information management



Collaborating with parents and guardians in a better and faster way



Simplifying and accelerating the way information was fetched



Matching the right educational opportunities to the right candidates

Strategy & Solution

For digitizing the process of managing the information of candidates and their respective parents and guardians, the client teamed up with our Salesforce experts. The client unlocked our rich expertise to build a custom Salesforce Community.

By having a dedicated Salesforce Community, the client found it faster and simpler to manage the candidates' relationships with their respective parents and guardians. We integrated the client's data that lived in siloes to create a comprehensive 360-degree view of the information of a student applying and staying aboard for international courses.

Front-End

As part of developing an interactive front-end model for the client's educational CRM, we unleashed the potential of the Salesforce Community. Once the Salesforce Community was implemented, the client easily gained key insights into:

- ✔ Exploring a candidate's key data points and overall lifecycle
- ✔ Discovering global educational opportunities for the candidates
- ✔ Easily accessing a robust and vast database of candidates

Backend

For building a powerful backend for the client, we harnessed the expertise of our Salesforce developers. We leveraged Salesforce's Lightning Web Components and Apex for seamlessly executing the transactional control statements and flow on Salesforce servers.

- ✔ Adding fresh business logic to different community-specific events
- ✔ Accelerating development time by using LWC's interactive code editor
- ✔ Testing different versions of Salesforce Community became easier

Technology Stack

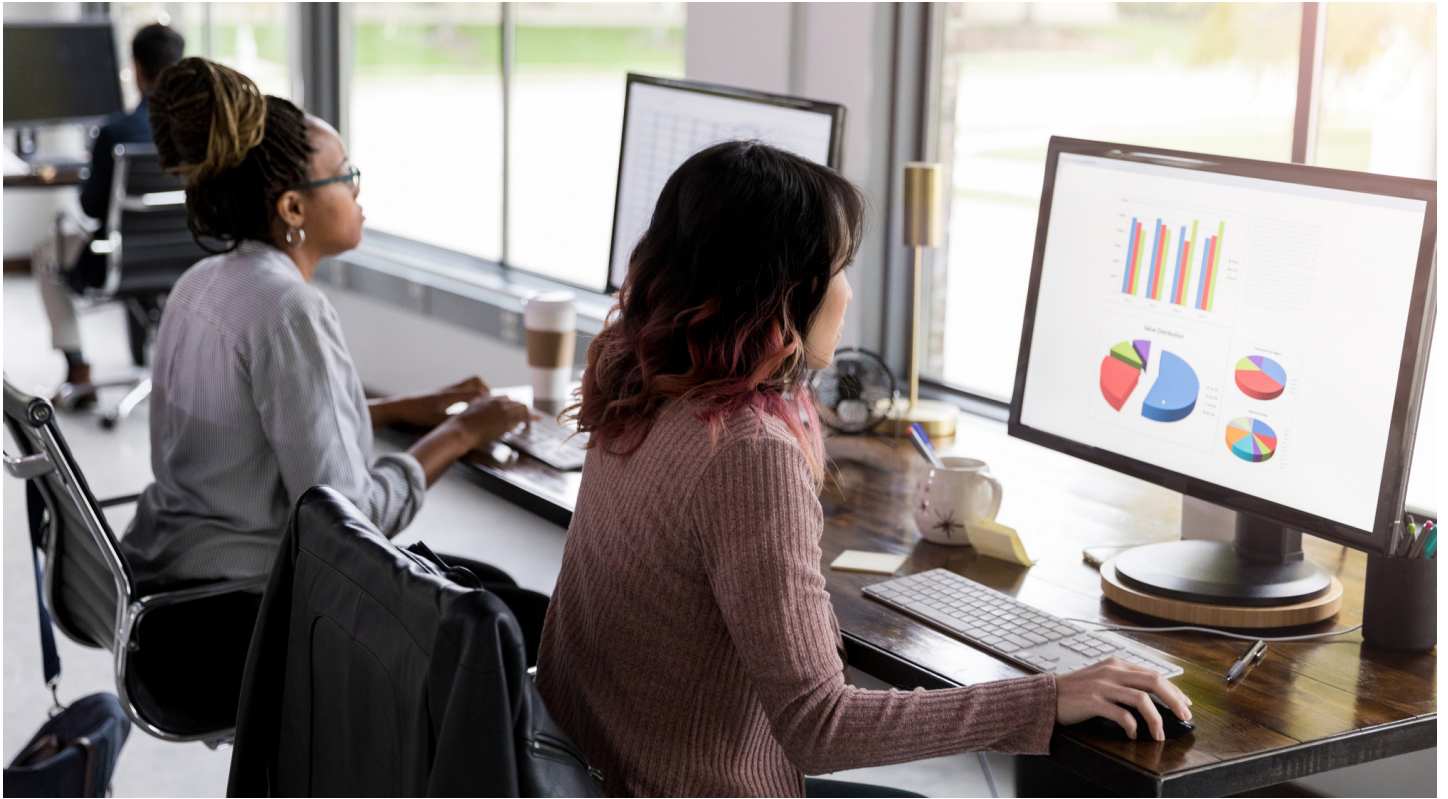
Salesforce Community | Lightning Web Components | Apex

Development Process

Different stakeholders were engaged in delivering the project. Each of the involved stakeholders was responsible for different aspects of Salesforce project development. We deployed multiple resources for handling the deliverables including project management, quality analyses, release management, and software development. Key highlights of the project development process are mentioned below.

- ✔ Predefining stakeholder participation for seamlessly supporting different phases including implementation, delivery, and post-delivery support
- ✔ Explaining the implementation phase's focus while keeping the goals achievable and well-defined
- ✔ Analyzing the current implementations process flows, custom objects, relationships, user roles, data, files, and deployment plans
- ✔ Creating product backlogs and developing sprints according to the set implementation plan
- ✔ Establishing Salesforce sandbox for implementing as per the pre-mentioned sprints

- ✓ Adding fresh users for testing the Salesforce Community model
- ✓ Developing an end-to-end data migration plan with the help of a dedicated data loader
- ✓ Delivering final training sessions to the end-users
- ✓ Upgrading and maintaining the Salesforce Community after the go-live phase



Business Outcomes

Once the Salesforce Community went live, it helped the client to manage candidate details more precisely and quickly. Since the dependency shifted from manual management to automation, the client embraced digital transformation in a new way. Here are some of the highlights of the engagement with the client.

- ✓ Reduced the time to manage complex information flow by 20 hours per week
- ✓ Brought down the annual data-discrepancy issues caused by manual management by 30 percent
- ✓ Improved the way candidate data is managed that simplified the way a global educational opportunity was connected with candidates
- ✓ Added new relationships for candidates including not only parents but also guardians and emergency contacts
- ✓ Streamlined the way the client contacted a student's parents and guardians in real time

Client's Speak



It was wonderful working with Cloud Digital and their team simply stood out in the times of need.

