

Brooke

Digital transformation supporting educational outcomes

Building better education support services through Salesforce technology



How our education client stabilised process delivery through Salesforce case management

The Problem

Our client, a key education services provider in the Victorian Government, needed to shift their schools support services from a manual process to a technology-driven service support model. The existing system was inefficient and did not enable the service support team to respond to customers, nor to effectively monitor status or provide appropriate reporting. Business processes required an overhaul to deliver enhanced customer service and better case management workflow and reporting through a CRM solution.

They needed a solution that:

- ▶ Supported their team to deliver best practice service support to their customers;
- ▶ Was flexible to scale up or down as required, to deliver the capability they needed whilst keeping the organisation's future technology roadmap in mind; and
- ▶ Integrated with with key functions and databases so the support team had access to the information and technology they needed to respond to customers without disruption

The CRM needed to be designed, built, tested, and implemented with a 12 week timeframe due to a legislative deadline.



Thinking Differently

Our client needed an implementation partner that would build their capability to deliver what they needed today, without limiting the future use of CRM within their organisation, within a short time frame.

Using Brooke's 6Ds problem-solving methodology, we collaborated with our client across two sprints to design and build the Salesforce CRM to deliver the functionality needed for the legislative deadline, whilst setting up the system for future enhancements.

Due to the tight timeframe, we worked with key stakeholders beyond the immediate project group to ensure a smooth and integrated transition to the Salesforce technology, ensuring that all existing systems supported the new Salesforce CRM and case management approach. Brooke conducted rapid start up training to ensure the team was ready to go, day one.

Doing Differently

Brooke and the client delivered the new Salesforce CRM on time and on budget, without compromising the delivery of service support to customers. Our client is now positioned to enhance their service support over coming months to continue, to deliver timely and effective relationship management, excellence in customer service and support and increased efficiency.

Salesforce Products Implemented

- ▶ Service Cloud
- ▶ Marketing Cloud
- ▶ Einstein

Meaningful Results

- ▶ Efficient and streamlined processes
- ▶ Enhanced capacity and capability to support the transition from paper to online testing
- ▶ Optimised analytics and reporting
- ▶ Timely and effective communication and customer relationship management
- ▶ Compliance with relevant policies and regulations, particularly privacy and data security

Rapid Transformation | Meaningful Results

If you want to solve your problem faster
then talk to our Account Directors.

