

Upskilled – Bringing together CRM and Student Management

A case study in automating your business

“At Upskilled we pride ourselves on being the leader in the delivery of education and training programs, from short courses through to Nationally Recognised Certificate and Diploma Qualifications. We needed a best of breed solution to support our delivery capabilities and enable us to continue to grow. Working with WDCi to customise Salesforce has enabled us to support our specialised business model with a customised CRM and SMS solution that matches our unique business.

We now have a sophisticated tool in place to enable us to respond rapidly to customer enquiries, track our delivery progress and report on our overall effectiveness.” – Varant Bomoushakian, Owner and Co-Founder of Upskilled



Upskilled Challenge

Implement a solution for sales automation and student management, providing a high level of visibility to our pipeline as well as courses, course details, delivery and student attendance. Deliver a solution that will scale and enable us to grow the business in addition to enhancing our compliance requirements.

Solution

- Salesforce Sales Cloud Enterprise Edition.
- Integration to JobReady using the Dell Boomi Atomsphere integration platform.

Details

The solution involved a redesign of our existing Salesforce instance, including:

- The ability to generate a customised training plan for each student with a single button click.
- Ability to track a student's progress against their training plan which enables nurturing if a student is falling behind.
- Wizard to guide the selection of electives based on the qualification and units of competence, it validates the selection against the Government packaging rules.
- Case management, automated workflows for handling any changes that a student wishes to make to the course or qualification that they are enrolled in.
- Resource management, a single view from the calendar of trainer, venue and room availability.
- Social integration, ability for when a student graduates that they can tell the world digitally that they are Upskilled with feeds to LinkedIn and Facebook.
- All Course information such as course instances, course details and locations is managed in Salesforce with dynamic updating of the information to the Upskilled web site.

Results

- **Complete Visibility:** All customer interactions are tracked and monitored in a single system
- **Compliance:** Ability to maintain compliance with minimal effort. All student records, results, courses details and compliance data are in one system. Compliance documentation for a student can now be prepared with a click of a button, previously this took 15-20 min per student.
- **Marketing automation:** Ability to send multiple personalised messages to students upon enrolment and throughout their course, giving them relevant and important information about their course, sessions and pre course requirements.
- **Ease of Enrolments:** Every qualification that is offered can be tailored to suit individual learning requirements. A wide selection of electives is available and the system ensures that the enrolments meet the government packaging rules.
- **Student Support:** By leveraging the power of having all of the student records in one place, Upskilled are now able to be proactive and can reach out to students who fall behind in their studies and offer assistance, as well as respond to student queries much quicker with more relevant information.
- **Highly customisable:** The ability to change Salesforce easily has enhanced adoption. The number of readily available applications on the Salesforce Appexchange has meant that additional features can be easily added as required.
- **Scalability:** Ability to scale to be one the largest RTO in Australia while rapidly responding to Customers, Staff and Compliance Audits.

About Upskilled

Upskilled is a leading RTO that innovates the effective and efficient delivery of vocational qualifications and professional development short courses at all levels. As one of the largest Registered Training Organisations in Australia, Upskilled partners with businesses and career-minded individuals to secure superior measurable outcomes. Upskilled offers over 36 qualifications across 7 key disciplines and over 170 online short courses at over 70 metropolitan and regional locations nationwide.