



COLLEGE  
OF MEDICINE

### About

**The UA College of Medicine – Tucson** provides state-of-the-art programs of medical education, groundbreaking research opportunities, and leading-edge patient care. Students receive an outstanding medical education founded on a mission of promoting health and improving the prevention, diagnosis and treatment of disease for all the people of Arizona and beyond, through education, research and patient care.

*Various offices of The UA College of Medicine – Tucson implemented Salesforce to extend Campus Enterprise solutions functionality and transform the way we track and serve our prospects and current students. In partnership with Sierra-Cedar's highly experienced consultants, we were able to rapidly achieve all of our intended outcomes and put the system to immediate use. Sierra-Cedar's knowledge and expertise on higher education, PeopleSoft, and Salesforce played an important role in delivering a very successful implementation.*

**Winifred Blumenkron**

College of Medicine – IT Project Manager

### Corporate Headquarters:

Tucson, Arizona

[www.medicine.arizona.edu](http://www.medicine.arizona.edu)

### Industry:

Higher Education – Healthcare

### Technology:

Salesforce.com

### About Sierra-Cedar

Sierra-Cedar delivers industry-focused client success by providing consulting, technical, and managed services for the deployment, management, and optimization of next-generation applications and technology.

[www.Sierra-Cedar.com](http://www.Sierra-Cedar.com)

### Background

The UA College of Medicine needed to be able to track its outreach program interactions with prospects, communications with current medical students, and correspondence with and events for students at academic risk. UA selected Salesforce.com as the system of engagement to extend the functionality of its system of record—PeopleSoft Campus Solutions. Sierra-Cedar consultants were contracted to assist with the Salesforce configurations, implementation and training.

### Challenges

Most of the challenges encountered during this project focused around security. It was important to ensure that certain records remained private to only one office, while other data was to be shared between the two offices. When security requirements changed during the project, requiring Role Hierarchies and differing record types, the team skillfully overcame the hurdle.

Importing data from one of the legacy systems was also a bit challenging in that, as is typical with such systems, validation rules had not always been followed resulting in inconsistencies. This challenge was easily met by the experienced UA/Sierra-Cedar team.

### Solution

In order to capture the differing data and successfully interact with students, the UA College of Medicine staff and Sierra-Cedar consultants gathered requirements and configured an organization in Salesforce that utilizes multiple record types, campaigns, and two types of cases. Profiles, custom reports, dashboards, and list views were configured and over 4,000 contact records were loaded into the system. Once the organization was migrated to production, UA personnel participated in end user and basic Salesforce administration training.

The UA College of Medicine gains the following as a result of this implementation:

- A supportable platform (no custom coding) to respond to business process changes in the future
- Ability to easily generate and track emails to students
- Internal collaboration between departments
  - Chatter
  - Student records (where security allows)
- Improved reporting, eliminating time consuming spreadsheets (required for research grants)
- Holistic view of contacts (students) with ability to track them before, during and after medical school