UNIVERSITY OF WISCONSIN OSHKOSH

About

University of Wisconsin Oshkosh offers nearly 200 majors, minors, and emphases, in addition to 15 graduate programs and two doctoral programs. With a strong research focus and national ranking in sustainability, Titans demonstrate on a daily basis what students can do to change the world.

Sierra-Cedar was the partner we needed to make sense of Salesforce in the context of higher ed. They delivered within an immovable timeline dictated by executive leadership within scope and budget. The Interactions and territory assignment modules were game-changers for empowering our counselors to effectively recruit!

Brandon Heise
CRM Architect/Business Systems Analyst

Corporate Headquarters:

Oshkosh, WI
uwosh.edu

Industry:

Higher Education

Technology:

Salesforce Sales Cloud

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

Background

UW Oshkosh procured Salesforce licenses in the Summer of 2015 with plans to administer a CRM for undergraduate recruitment and admissions. Seeking to improve the initial configuration to align with its Admissions Office's requirements, UW Oshkosh needed an implementation services provider with strong higher education experience to assist with the re-implementation of its Salesforce CRM using HEDA (Higher Education Data Model) and Lightning. UW Oshkosh selected Sierra-Cedar in July 2016 to help with this project.

Challenges

The first challenge UW Oshkosh faced was acquiring a new Salesforce platform in order to move forward with its project initiatives. The initial platform was configured with Person Accounts enabled, however the UW Oshkosh team decided it would be more effective to use HEDA. Executive leadership established an aggressive timeline for the project with a firm project go-live of January 2017. The decision to acquire a new Salesforce platform shortened the implementation timeline by six weeks, but didn't allow sufficient time for the research and purchase of a full integrations solution. This challenged the implementation team to create daily flat file integrations.

Solution

Sierra-Cedar assisted UW Oshkosh with the re-implementation of Salesforce Sales Cloud using HEDA and Lightening. With a future enterprise vision in mind, Sierra-Cedar created a custom recruitment configuration using its Interactions and Territory Assignment accelerators. The custom recruitment system replaces static spreadsheets, streamlines admission counselors' workflows, and tracks outreach to prospective students via email, phone, and in-person. Recruitment territories can be assigned based on configurable Salesforce reports so that admission counselors are able to view prospective students in their own territories. A paper-based check-in process was configured in Salesforce so that staff are able to manage prospective students attending tours and on-campus events. The project team also developed automated event registration confirmations, reminders, and thank you emails. The project was completed within timeline, scope, and budget.

Key Project highlights include the following:

- Re-implemented Salesforce Sales Cloud using HEDA and Lightning
- Customized recruitment using Sierra-Cedar's Interactions and Territory Assignment accelerators
- Created custom event registration and management for daily tours and preview days
- Replaced paper-based workflow and automated event confirmations, reminders, and attendance thank yous.