A leading flight pilot training group based in Maryland leverages Salesforce workflow automation and Salesforce integration to improve efficiency and productivity

The client is the world's largest community of pilots, brand in aviation and the strongest voice for freedom to fly! Their products and services span the broadest-reaching media platforms and aviation technology and products that pilots use to travel the country and the world.

Challenges

Their team currently captures a variety of data related to high school, teachers, students, opportunities, surveys, etc. using different applications. These data points are captured using tools like FormAssembly for capturing High School/Teacher information, Laserfiche for content management, and Qualtrics Tools for capturing survey data.

With these data residing in silos, the client was facing a huge challenge in tracking the latest status updates, activities, relationships or opportunities. This also hampered their marketing plans and their ability to engage the users effectively and promptly. Client's attempts to extract data from each application and move it to their Salesforce CRM, as a central database, was not only time consuming, but error prone. All this dampened team morale, productivity, and efficiency.

Solution

DemandBlue advisory team worked closely with their team to understand their business. After a thorough analysis of their workflow process and the various applications that were in use, we recommended them to leverage the inherent features of Salesforce to manage the following –

- Capture High School/Teacher information along with filled-in form information directly in Salesforce
- Initiate approval/agreement process
- Store the signed agreement files in Salesforce
- Capture survey feedback from Teachers
- Automate opportunity renewals

We integrated Salesforce with FormAssembly and DocuSign so that the data captured by these apps would automatically populate in Salesforce. We also utilized Salesforce automation rules to set up a workflow for form submission, approval, signature, capturing survey feedback, creating automated tasks and renewal opportunities. Following are some of the key tasks that were completed-

1. HS form submission by High School
2. Approving the HS form in Salesforce
3. Teacher form submission by Teachers
4. Approving the teacher form in Salesforce
5. Sending out the agreements for signature
6. Capturing the survey feedback
7. Creating renewal opportunities
8. One-time data import of Accounts and Contacts

Benefits

- Previously, due to increased demand on manual effort and complexity involved in the processes, the client's team could only create around 75 curriculum entries per year. With our new system launch, within 30 days they were able to launch 90+ programs. This is a mind-boggling 1500% improvement in efficiency.

- With the introduction of automations and customization, user adoption of Salesforce increased by 65%

- Strategic integration of different applications directly to the Salesforce CRM created an automatic two-way dataflow that eliminated data errors and duplicity

- With the improved efficiency of the application and increasing productivity of the employees, Client is poised to realize their aggressive project enhancement program