

the
SUMMIT
AWARDS

2020 Nominees





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INDY 2020

We are thrilled to present this year's nominees for the Summit Awards. Once you read through their stories, we look forward to receiving your vote!

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Nominees

Excellence in Student Success



SF SANTA FE COLLEGE



Excellence in Institutional Efficiency



UF UNIVERSITY OF FLORIDA



Excellence in Innovation



Overall Excellence in College and Career Prep



Community Champion

Florence
Parodi

Kathleen
Lueckeman

Haley
Gould



Excellence in Student Success

This award will be given to a college or university that is using Salesforce to impact student success in a positive way.

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Westmont College, Office of College Advancement

Westmont has developed an extensive and innovative summer program that allows students interested in business, computer science, and data analytics to work on a real business problem for the school through the Salesforce platform. The program is called the Center for Applied Technology (CATLab). For 15 weeks a group of students develop and conquer a business problem for the college, grow their understanding of Salesforce architecture and begin a successful career in cloud computing.

In the summer of 2018, 7 students built out an entirely new and robust Advancement system for the college, to handle gift processing, donor engagement, and mass importing of records to minimize duplicates. The summer of 2019 began Westmont's journey of merging its Admissions department into its Advancement system, so the school can have one primary system of record. Their hope is to equip students with soft and hard skills for the work marketplace, while creating a business platform the school can rely on for years to come.

SF SANTA FE COLLEGE

Santa Fe College, Office of Admissions

Even a community college that prides itself on open access can benefit from a little digital help to open doors for students. **Santa Fe College** leveraged out-of-the-box functionality in Salesforce to develop a winning strategy to promote, manage and follow-up its first-ever Open House event.

Outreach campaigns for Open House first targeted students who had submitted information requests, visited for tours, submitted initial applications, or asked for program requirements. With no direct IT support, the Admissions team built a structure that allowed prospects to register for the event, seek out more information about specific programs, and learn about the enrollment process. This personalized digital strategy paid off, as more than 800 registered in advance. On the day of the event, 600 prospects, most of whom came from out-of-the-area and from all over the country, checked in via iPad or laptop, all through a Salesforce check-in app. Along with parents and other family members, more than 1,000 visitors roamed campus for an event that organizers expected to draw at most 400.

Automated re-engagement campaigns through Salesforce and Pardot, combined with direct contact from the advisors who students met that day, moved those prospective students from connection to conversion very quickly. In fact, all but one of the student visitors to Open House ended up applying to the College and of the 600 attendees, 435 students, a remarkable yield rate of 72.5%, enrolled for the Fall semester. Not coincidentally, the college enjoyed an overall increase in Fall enrollment in 2019.



The University of Arizona, Trellis Student Success/Advising Team

The University of Arizona embarked on a journey with Salesforce in January 2019. In just 8 months, the university launched an advising tool using Service Cloud and is already seeing immediate, overwhelmingly positive reactions from students and advisors. Arizona also released a comment-based early progress report system that instructors can use to initiate valuable conversations around classroom performance, provide timely feedback, and connect students to appropriate university resources.

Arizona's CRM program, called **Trellis**, released three products in its first 12 months: Advise, Progress and Social, while also laying the foundation for data quality and analytics. To inform its strategy, Trellis engaged with over 400 university staff and faculty, and collected insights from students through surveys, intercepts, and focus groups. Thoughtful pre-launch efforts—including product testing, user training, and data migration efforts—supported users through a seamless transition. Since July 2019, Trellis Advise has helped book over 12,000 academic advising appointments and students continue to be a key player in the development and refinement process. Watch [the video](#) to learn more about Trellis's first-year accomplishments.

2020 will be equally exciting for Arizona. Trellis Advise's core capabilities will expand to support bulk communications and events. In the spring, the student service expansion project will move other student service organizations into the Trellis platform—resulting in a one-stop virtual service center for students, and a system of collaboration among student service units. A new student portal will provide an integrated, personalized experience that brings together high priority interactions and information across the Salesforce CRM, Student Information Systems, and Learning Management System platforms. Other focus areas for the coming year include marketing, event management, and industry and external partnerships.

A trellis is a humble framework for supporting intertwining growth, and Trellis is doing just that—supporting the university in continuing to grow the valuable outcomes it achieves through its relationships.





Excellence in Institutional Efficiency

This award will be given to a college or university that is using Salesforce to increase operational efficiency in one or more areas of campus, providing a holistic connected campus experience.

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Butler University

Butler University is using Salesforce to centralize knowledge and institutional service for a frictionless constituent experience. By uniting administrative and support departments such as IT, HR, Student Accounts, and the Center for Academic Technology around the use of Service Cloud and Community Cloud, Butler is streamlining the support experience. Using a centralized support community at ask.butler.edu, these areas can share knowledge articles with guests and authenticated users to answer common questions before they are even asked.

When a topic isn't covered yet or the subject is a little more nuanced, ask.butler.edu also provides a mechanism for easily submitting a case. Through flows and case assignment rules, the IT Help Desk then uses Salesforce to route cases to the appropriate department and cut down on instances of constituents being bounced around campus to have their questions answered. Unified within a common solution set, department leaders can share their insights with peers using reports and dashboards to update the knowledge base, deflect easy-to-resolve questions, and enable their staff to spend more time on complex problems faced by their constituents.

For Butler University students, faculty, and staff, ask.butler.edu is all they need to remember - it's where they'll find the answers to their questions and the ability to log a support case, all without needing to know the intricacies of the university's structure.



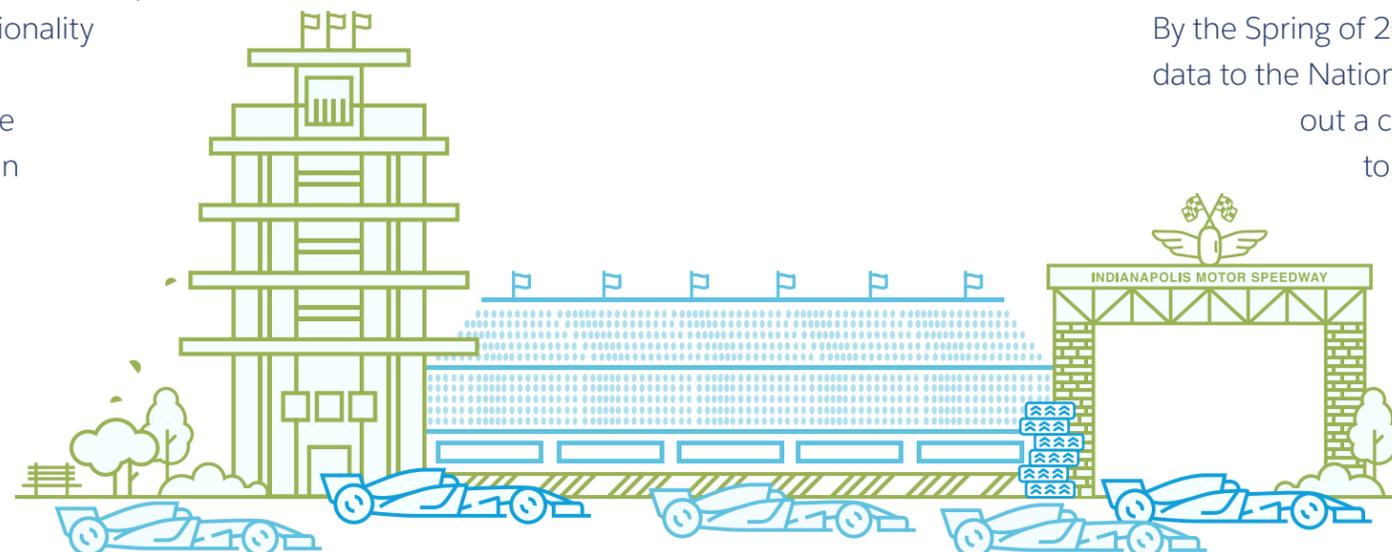
University of Florida, UFIT Enterprise Org

The **University of Florida's** CRM Team has built a single Salesforce org that serves as the case management solution for nearly 30 academic advising offices from 12 colleges, the Division of Enrollment Management (Registrar, Student Financial Affairs, Admissions), offices within the Division of Finance and Accounting (Bursar, Payroll Services, and Disbursement), units within the Offices of Research (IRB, Tech Licensing), offices from the Division of Student Affairs, and multiple offices in Human Resources.

The team has relied upon and expanded EDA to include not only academic program and course enrollment information from PeopleSoft Campus Solutions, but also Human Resource data, information from the University's Finance and Accounting systems, personal and demographic information from UF's Master Data Management Person Hub, and data from other systems of record. The foundation of the enterprise org is a public/read-only Account & Contact model which contains over 1 million unique contacts with over 1.4 million affiliations.

A tremendous advantage for the institution is derived from the fact that cases for all of these constituents are managed in a single org. This centralization allows University administrators to establish baselines (for the first time) regarding the number of cases and interactions along with response times and time to resolution. In 2019 over 401,000 cases were created and over 373,000 emails were sent. This is a testament to the scale of activity occurring in Salesforce - activity which previously occurred in an array of email inboxes that was next to impossible to report on.

By starting with standard functionality like case management, UF has established a foundation for the use of other features available in Service Cloud and other Salesforce products.



Austin Community College, Office of Experiential Learning and Salesforce Development Team

Austin Community College's (ACC) Salesforce Development Team, along with the Office of Experiential Learning (OEL), have created ACCess Internships App, which allows the College to create, track, and store dynamic, user-friendly compliance/regulatory documentation for hundreds of employers, students, and faculty.

Salesforce's out-of-the-box integration experience allowed a small team of newly-trained Salesforce administrators to roll out the ACCess Internships app within weeks. This quick turnaround time allowed both OEL and the Salesforce Development Team to collaborate and find new and more innovative ways to enhance the system, resulting in a higher functioning, intuitive and more individualized user experience. Through this approach, ACC OEL team of only two employees can effectively serve hundreds of students and over 500 external partner accounts and faculty members, while storing and maintaining regulatory documentation.

By the end of its first semester of implementation, OEL had grown its employer partner accounts 5x, contributing to student success and graduation rates. The real-time app has made it easier to communicate with the Employer Partners and track information about internships such as: the number of posted positions, where interns have been placed, which opportunities were filled or unfilled by ACC students, how many were paid vs unpaid and the total average wage across the college and by area of study.

By the Spring of 2021, ACC will be able to contribute an entire year's worth of qualitative data to the National Association for Colleges and Employers (NACE), who in 2019 put out a call for research on the topic of paid vs. unpaid internships. ACC hopes to not only assist in filling information gaps, but to begin thinking critically about finding solutions to those problems for a more equitable and accessible experience for students.



Excellence in Innovation

This award will be given to a college or university that is using Salesforce to innovate in one or more areas of the institution (recruiting, student success, advancement, marketing, community engagement, etc).



Hult International Business School, Central Technology Department

Hult International Business School is spread across 6 campuses. Among the unique aspects of Hult is the continual rotation of students, faculty, and even staff between the campuses. The global dispersion, along with Hult's drive to continue to innovate, created a great deal of pressure for technology solutions from every part of the school. Over the past three years, Hult's Central Tech Team has led the adoption of Salesforce across all departments and staff. By implementing Salesforce institution-wide, it has made supporting such a complex organization easier while also improving the student experience. Below are a few brief examples departments and current uses of Salesforce:

- Academic teams and registry use Salesforce as their student information system including automated degree audit and course registration system.
- Hult Careers Services uses Salesforce to engage advisees, approve resumes, advertise jobs, and track employment journeys.
- Student Services uses Salesforce to run orientation schedules, organize events, and manage campus spaces.
- The Visa Department uses Salesforce to support students through complex visa journeys as they move between the international Hult campuses.
- Academic Services uses Salesforce as a faculty database and faculty portal. Display of course loads, schedules, evaluations, research and publishing contributions.
- The Housing Department is using Salesforce to manage room reservations in student accommodation
- Students are engaging with the school as well as their own progress at every level through communities.
- Students are now using a Salesforce mobile app to view class schedules, view and register for events, book appointments and team rooms, get personalized notifications, and more.

With everyone speaking the same 'language', the Central Tech Team is now well situated to support and guide any future enhancements or changes across the school. Possibly the most exciting byproduct of this project is a newfound collaboration between staff because they are using the same system and can swap best practices, strategies, and ideas.



Dordt University, Enrollment and Marketing

Comprised of a small team with no coding or IT experience, **Dordt University's** enrollment and marketing teams took up the task of implementing Salesforce and Pardot with no previous CRM platform experience. Dordt's Center for Excellence, affectionately known on-campus as the Nerd Herd, began innovating enrollment processes through Salesforce and automating marketing through Pardot. With the help of Salesforce dashboards, Pardot marketing automation, Einstein Analytics, Enrollment RX self-service student portal, and more, Dordt has had impressive results within the last 18 months, including:

- 29% increase in campus visits
- 7% increase in applications
- 4% increase in completed applications (reversed a 9-year downward trend as an organization)
- 2% increase in matriculation (reversed a 12-year downward trend as an organization and with cohort institutions)
- 6% deposit-to-enrollment increase
- 10% increase in freshmen enrollment (on average, our cohort institutions are down 7% in enrollment)

During the 2019-20 academic year, Dordt's administration has aligned around a common goal of "all-in," where all faculty and staff are committed to the enrollment goals of the university. Salesforce makes this possible. The enrollment and marketing offices have partnered in this endeavor; the enrollment office has trained key faculty to utilize Salesforce recruiting data, while the marketing office has provided communication and advertising for specific academic departments on campus based on need.



Arizona State University Enterprise Partners

ASU Enterprise Partners has been a long-time innovator on the Salesforce platform. Their latest project was to build a donor platform that functions less like traditional alumni/donor giving pages and more like a modern eCommerce experience. Using Commerce Cloud, and with the help of the Salesforce team and a partner, the ASU Foundation created a unique environment and the first Commerce Cloud deployment in higher education.

Their use of Commerce Cloud is enabling a dramatic increase in the foundation's ability to collect engagement data as users peruse their site: asufoundation.org. The commerce experience allows for each of their thousands of fund designation pages to leverage imagery, videos, quotes and, most importantly, a description of the impact that a gift makes.

Rather than a simple fund-designation dropdown—where users may leave the page to research and never return—the ASU Foundation can control the experience instream and ensure marketing efforts are targeted, directing donors to causes they care about and facilitating a frictionless giving experience. Looking to the future, ASU Enterprise Partners plans to leverage Einstein and Marketing Cloud to provide intelligent and personalized giving recommendations to potential donors based on each individual's interests, giving history, web-use, and affinity.





College & Career Prep Award

This award will be given to an educational institution or system (K-12) using Salesforce to prepare its students for success in college and career.



Discover a World of Opportunity™

Denver Public Schools (DPS) initially implemented Salesforce and Pardot to improve communications between parents and its Family and Community Engagement team (FACE). Seeing success, DPS sought to expand its use across the district, specifically to more deeply understand the impact of CareerConnect – a program that prepares students for success in career and through relevant coursework while connecting them with partner companies and higher education institutions for hands-on workplace experiences and mentoring.

The DPS CareerConnect team now leverages Salesforce to manage information for over 14,000 students, 250 community and business partners, and 38 schools across the district. This gives them visibility into every aspect of their program and with a 360-degree view of each student's journey from middle school through graduation. In addition, the team pulls reports, analyzes data, and shares information with business partners and schools to gauge student impact and inform their strategy to better serve underrepresented groups with work-based learning programs.

“This is about eliminating economic and educational barriers so that all students have equal access to college and career opportunities,” says Theress Pidick, Director of Work-Based Learning. “Salesforce has given us a clear picture of who we partner with and how our students gain access to programs that will better their future.”



Chicago Public Schools (CPS) implemented Salesforce as the CRM for managing its innovative Career and Technical Education (CTE) Work-Based Learning programs, which give high school students across seventy-two schools a running start in preparing for both college and career. Over 14,000 students take part in CTE programs each year with 90% of them participating in some form of Work-Based Learning experience such as site visits, job shadows, and summer internships. In addition to working with a large and diverse student group, CPS collaborates with a wide network of workplace partners, parents, teachers, and administrators.

With Salesforce, CPS CTE was able to streamline processes to effectively manage Work-Based Learning district-wide. Using Salesforce as the integration layer to track student success through CTE offerings has improved central administration oversight and program management. District staff now have instant access to data on each school – and aggregated dashboards – that were virtually impossible to assemble previously. Administrators can also easily track each student’s engagement in CTE and view success metrics over time at the individual, school, and district levels.

CPS has seen great success with its innovative CTE model and looks to utilize Salesforce as it expands CTE Work-based Learning offerings. The CPS team shares a sense of pride when they see CTE students and alumni achieve their college and career goals.

Alexander George, a Work-Based Learning Specialist, describes a student who is pursuing his degree to become a teacher, “He told me how CTE opened up a pathway for him where he was able to realize his strengths.” George adds, “He was able to gain real-world experience and discover the field he wants to go into. That’s really a testament to the power of CTE.”



The **Cristo Rey Network** of private high schools uses Salesforce to manage its innovative Corporate Work Study model. Students from economically disadvantaged families attend classes four days a week and spend the other day working jobs at nearby corporate partners--including Salesforce--earning a salary that covers the majority of their tuition.

Salesforce has become the Cristo Rey Network’s entire student database management system. The national office now has visibility into each corporate partner and student placements. It can analyze data and share it with schools to inform their strategy in securing new corporate partners. It can also keep track of where students work, timesheets, and have direct dialogue with supervisors to get immediate feedback on how a student is doing.

“The students get a college-prep education and get this great experience doing actual paying work with these fantastic companies,” says Mark Bazin, Chief Technology Officer. “Students are graduating ready for college but also ready for life in the workforce.”





Community Champion

This award is given to an individual who consistently demonstrates thought leadership, innovation in transparency and inclusive collaboration, and unparalleled dedication to the Salesforce Education community.

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Florence Parodi



Florence Parodi is the Director of the Rapid Application Development Team of the Information Technology Division at the University of Miami. In this role, Florence is responsible for leading the institutional strategy around Salesforce. As a Salesforce Certified Administrator and Salesforce Certified Platform App Builder, she is currently leading the efforts toward a connected campus solution supporting CRM and custom development applications for prospective students, students, employees, and other audiences.

Florence also has led the effort to set the vision and the strategy for Interactions for Student Recruitment, a project funded by a Salesforce Technology Innovation grant. It delivers open-source technology, comprehensive documentation, learning guides, and additional implementation resources to the higher education community.

Florence is a Salesforce MVP and has been a member of the Higher Ed Advisory Council for five years and served as the Council's chair from 2017 to 2018. She also held the first community-led "Ask Me Anything" (AMA) in the Power of Us Hub.

Florence is one of the most active members of the Hub, helping colleges and universities across the country get started with, adopt, and learn more about the power of Salesforce in higher education. If she's not leading the conversation in the Hub, she's only a question away!

Kathleen Lueckeman



Kathleen Lueckeman, Chief Strategy Officer at Olivet Nazarene University, is also one of the chief architects of the higher education community of Salesforce users. She founded the very first Higher Ed Summit and created the Salesforce.org Higher Education Advisory Council. She has established programs like user groups for higher education – she is the Higher Education Community Group leader - and Higher Ed Office Hours, the monthly call-in program that she moderates to answer questions about using Salesforce. Kathy is active in the open-

source community, attending every Open Source Community Sprint offered to higher education, providing an open-source solution for admissions, and speaking at events on using open source solutions to harness the power of the Salesforce platform.

Kathy serves in countless private ways, volunteering her time to help schools understand use cases, org strategy, products, pricing, implementation, partners, apps and more. In the last year, alone, she has talked with more than 50 schools, a practice she started in tribute to those who helped her when she implemented in 2011.

But it doesn't stop with one-on-one assistance for schools. She is active in the Power of Us Hub and Trailblazer Community, managing several of the Groups and responding to posts and questions in those communities. You also can find her at most higher education events and several community "Dreamin" events each year, where she presents, makes introductions among peers, and inspires others in their work.

Haley Gould

Haley Gould is the CRM Manager and Architect at Michigan State University and a 3-term member of the Higher Education Advisory Council (HEAC). At Michigan State, she manages the enterprise CRM Team, leads projects and implementations, coordinates the campus roadmap and adoption requests from Campus Partners, and works with other teams across campus to ensure best practices and resources are leveraged.



Haley is part of the planning committee for the CRM Forum, a grass-roots event organized by universities with a shared interest in enterprise CRM. She also brought her entire team to the Salesforce.org Community Sprint in Detroit, where she helped spearhead two projects around transfer credit evaluation and native duplicate reporting.

In 2019, she partnered with Salesforce.org on the Education Empowered Podcast and co-hosted the PodCACHE, an initiative led by the HEAC to share collective advice for CRM in Higher Education. Now in season two of the podcast, Haley loves sharing these stories on thepodcache.com and via twitter @thePodCACHE. She also started a BigTen User Group and is planning a virtual meetup in 2020 for these schools to share knowledge and experiences. Haley loves talking with others through reference calls, the PodCACHE episodes, the Power of Us Hub, and community events, aiming to find ways to make connections between schools who might share a common history, use case or experience.



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