

Learner Tracking in Salesforce

Development of an on-line system in partnership with the 'Salesforce' organisation, to track, record and dramatically reduce the reporting burden (through automation).

Project Summary

- To create an online bespoke database application to bring together key data sets used by back-office and frontline staff to manage the personalised learner journey, learner progress and funding streams/budgets.



Background

- Inadequate systems for tracking learner data
- Need for better communication between frontline staff and back office to avoid funding errors
- Personalised learning programmes – increased tracking requirement
- Staff time wasted – duplication of effort, meetings etc
- Off the shelf software too expensive or does not meet needs.
- Multi-site provision and consortiums

Project Aims

- To create a system that:
 - Supports programme planning
 - Is accessible and secure
 - Is responsive to learner needs
 - Is sustainable and of benefit to the sector
- To secure efficiency savings through :
 - Partnership with the Salesforce Foundation
 - Reduced staff time spent on tracking and co-ordinating learner support

Project partners



- Independent training providers/charities
- Harington - 60 learners, LLDD, FL, Grants
- First Rung – c. 350 learners, FL, ESF, Apprenticeships



- IT support provider
- Runs CCNet – shared costs and resources

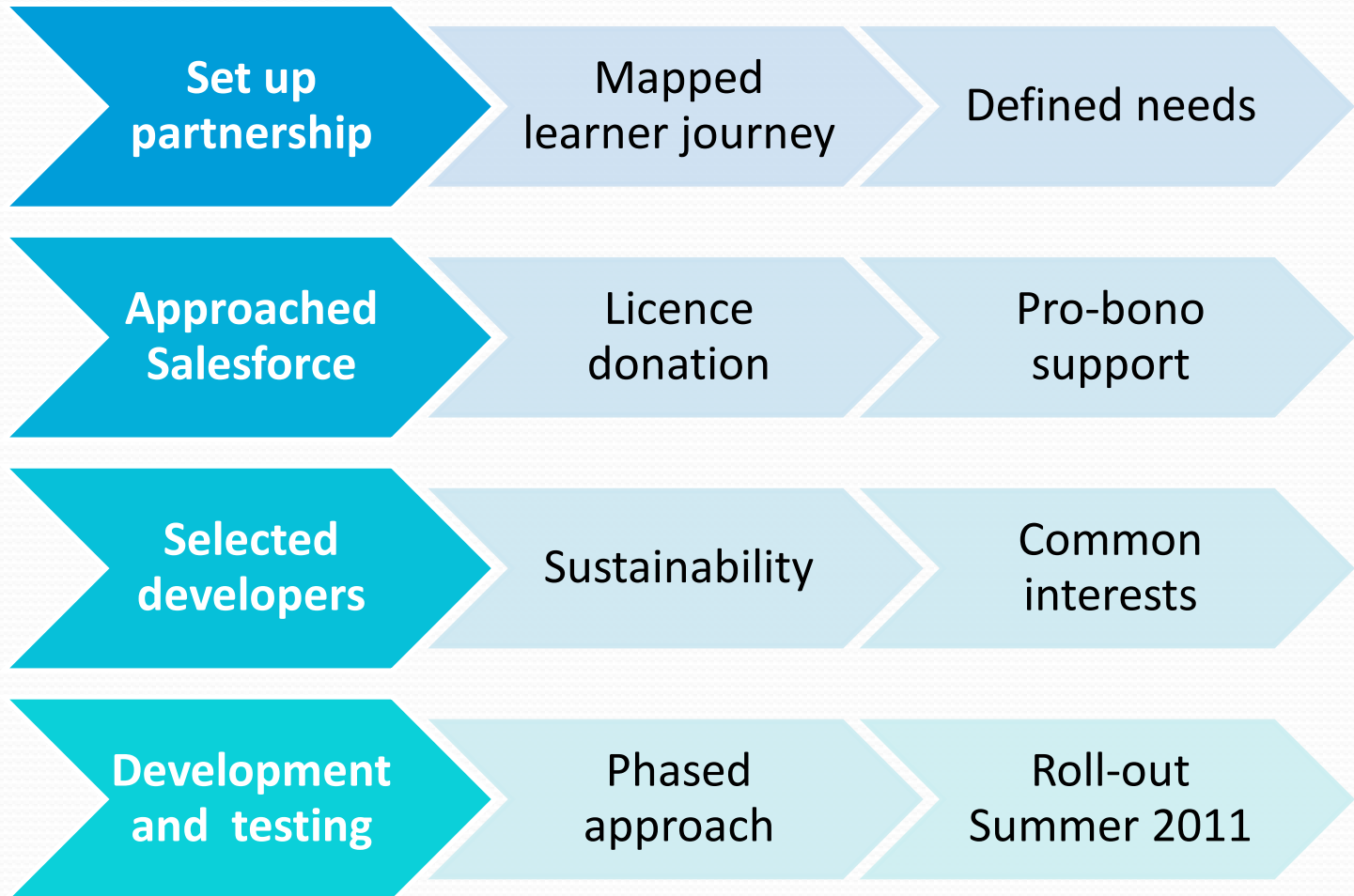


- Salesforce Foundation
- CSR: 1% time, 1% equity, 1% product

Why Salesforce?

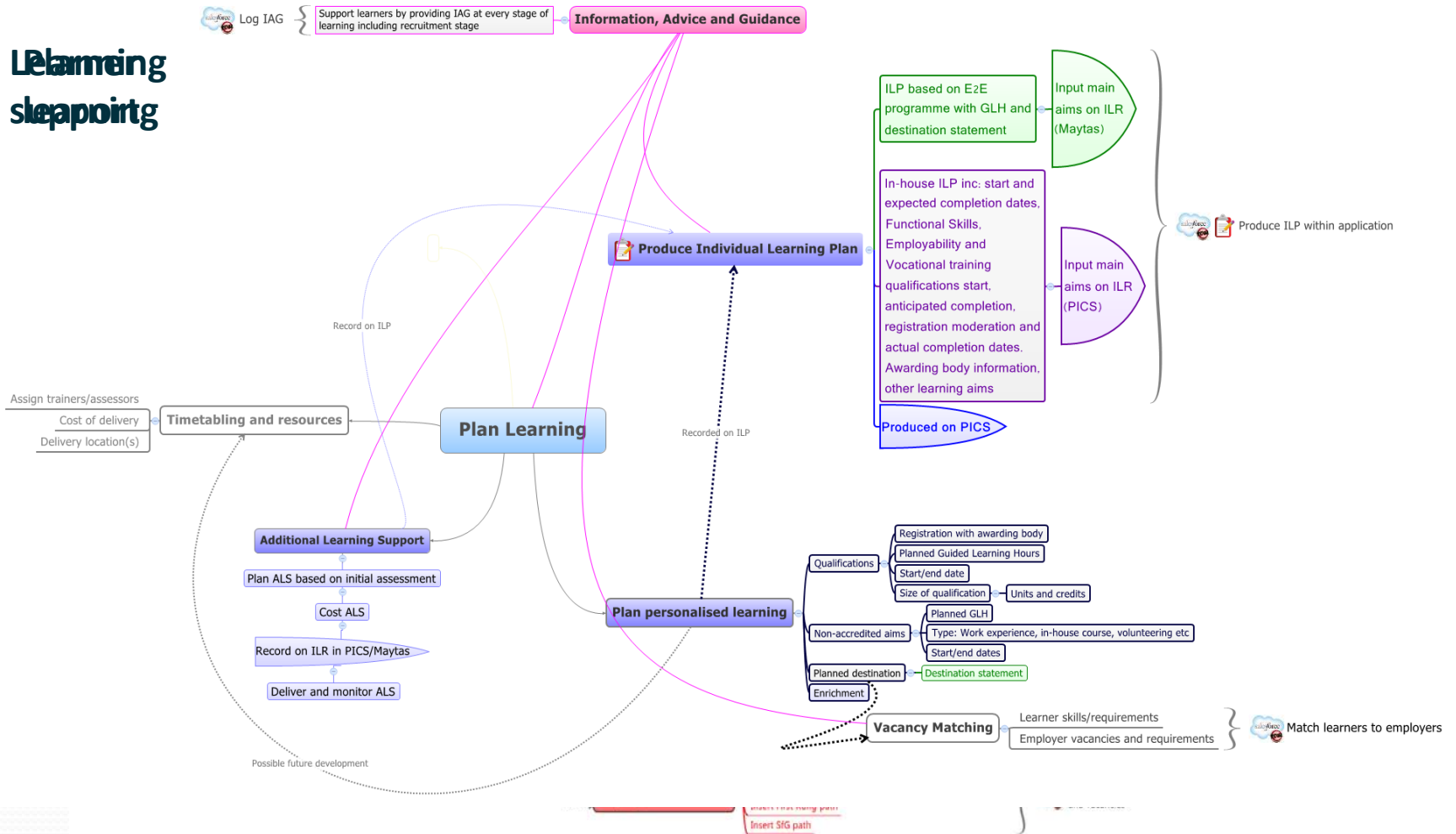
- Market leader for CRM – used by 97,700 companies
- No software hassles - Web-based, no installation or updates
- Easy to use and customise
- World-class security infrastructure
- Good for automation of tasks / processes
- 10 free licences + 80% discount on additional licences for non-profits and HE organisations

What did we do?



Mapping the learner journey

Learning support



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Overview of Application



Management and administration (monitoring, reporting, analysis and improvement)

Recruitment

Marketing campaigns

Lead management

Social network integration

Applicant tracking

Email, calls, messaging and tasks

Delivery

Planning

Qualification and progress tracking

Document production

Success rates

Attendance monitoring*

Activity logging

Learner Support and Services

ALS planning, logging, costing and review

Call, meeting and visit logs

IAG management / allocation

Case work
-At risk
-Safeguarding
-Complaints
-Enquiries

Action plans and task assignment

Supporter / parent / carer liaison

Work experience placement management

Profiling and vacancy matching*

Partner CRM

Internal staff

Employer recruitment and liaison

Referral agency liaison and marketing

Delivery partners

Funders and agencies



Whole organisation communication (updates, follow capability, information sharing)

Future plans

- Learner portal – access to progress record on-line
- Further workflow automaton
- Vacancy matching module
- Make application available to further providers – mainly small /third sector

Costs, savings and benefits

Project costs – Software

One-off project costs	Actual	Off the shelf customised *
Initial set up/installation	£0	£15,000
Developer time	£16,000	£10,000
Hardware	£4,100	£4,100
Training and admin	£4,900	£4,900
Total	£25,000	£34,000

* Compared to customising an leading customised database

Annual costs	Projected	Off the shelf customised *
Licensing (40 users)	£4,080	£4,000
Developer	-	£1,000
Total	£4,080	£5,000

Projected savings

- Value of Initial Salesforce Foundation donation - £21,900
(licenses and pro-bono work)
- Cost savings per year
 - Annual Salesforce donation £37,200
 - Staff time savings £24,200
- **Five year cumulative saving £310k+**

Benefits

- Less duplication, better communication
- Better co-ordination of IAG → Improved outcomes
- Real-time reporting – closer monitoring and improved management of provision
- Much improved recruitment and marketing tracking and a more targeted approach = cost savings.
- Potential to use Salesforce for other purposes in future



What have we learnt?

Do:

- Give yourself plenty of time to plan, tweak etc.
- Find the right partners – mutual benefits
- Make sure your developer understands the big picture.
- Consider cloud-based or SaaS applications before making an investment in software/hardware.
- Trust the cloud – excellent security, support and up-time
- Find corporate partners – CSR programmes

What have we learnt?

Don't

- Invest large amounts in stand alone applications – may not be sustainable.
- Be afraid to develop your own solution

Any questions?

- Contact email addresses
 - Project lead: joanna.baxter@harington.org.uk
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