



PARTNERING IN THE DIGITAL TRANSFORMATION OF A LEADING UNIVERSITY IN THE U.S.

A Dedicated Global Team proffering world-class technological solutions to a leading university through complement and collaboration

The Client

A U.S. based leading online university that offers affordable degree programs--mostly Master's and Doctorate levels to boost the professional development of educators, and to build well-equipped software systems that will deliver comprehensive solutions to their customers using the power of advanced technologies.

The Background

The client wanted a robust and all-encompassing solution to revamp their existing CRM solutions, website and report generation process, and also add course modules to their Learning Management System, Canvas. They needed a strategic and technically endowed partner to implement migration, while also offering in-house development of these solutions to facilitate their online education programs. The system was not just limited to application development, but to devise a more holistic support that will help in continuing to drive their business.

The Task Highlights



The Challenges: Technical

Lack of technical know-how: The client did not have a proficient in-house technical team. Because of this, all development tasks were done by different service providers, which failed to meet the client's expectations.

Integration issues: There was no proper integration between different solutions, and if provided, they were not optimal.

Poor Documentation: In most cases, documentation also was not in place for the solutions designed. This marred the CRM performance.

The Challenges: Business

Diffidence to Technology: The foremost challenge was to make various business owners understand the necessity to get away from the conventional methods of operating their business and induce them to embrace advanced technologies for implementing effective solutions.

Absence of Best Practices: Some of the contemporary industry best practices, like using Share-Point or other collaboration platforms for tracking workflows were not in place. The challenge also included the deployment of such best practices.

Why Suyati

- Suyati's pioneering model called Dedicated Global Team (DGT), wherein clients can build their own team within Suyati (in-house solutions) and hold the reins of the team in their hands.
- We have excellent records of long-sustained relationships with our clients and delivering projects on time.
- Our specialized knowledge and experience in delivering unparalleled CRM solutions.
- Our ability to identify and provide the right resources.
- Laying more emphasis on ownership and getting motivated with the business results and outcomes.
- More focus and orientation towards business through technology.

The solution in a line

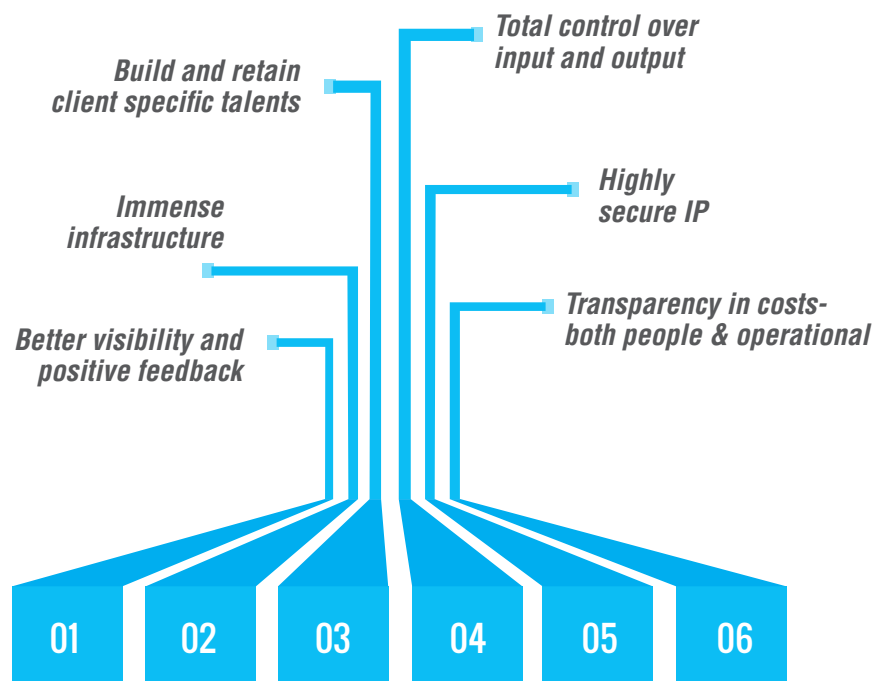
Create a new website design with modular approach towards content, and render MS Dynamics CRM customization solutions for their lead management.

The Engagement Model

We offered a unique DGT engagement model to the client that helped them in overcoming the challenges, which they were facing with vendors in the past. Pioneered by Suyati, Dedicated Global Team (DGT) is an engagement model that gives clients the opportunity to build and own an in-house team within Suyati. The core strength of the DGT model lies in the complete creative, technical and financial control it offers the client over the team and the way the projects are carried out. The model brings together the advantages of IT outsourcing, while wiping out its drawbacks.

At Suyati, we proposed a 5-member dedicated team, which had the right skill sets and experience the client needed to accomplish their business goals. The DGT focused on reduction of operating costs, faster release time to market, leveraging critical internal IT staff for strategic work, greater flexibility, and most importantly, dedicating more time and energy to concentrate on core business rather than technological support.

Advantages of DGT:



Nature of the Project

The nature of the project was that of a complement and collaborative model. The process began with Suyati delivering the solutions on request; but gradually we took over the documentation solutions and soon started offering design and development services as well. This DGT Engagement witnessed a major shift in the workflow with the progressive transition from the traditional Waterfall method to the Agile methodology, executed iteratively in short sprints.

Our Technology Stack

Our proficiency in Sitefinity and MS Dynamics help us provide the following services to the client. The technology stack comprises Sitefinity 8.0, MS Dynamics CRM, SSRS, SSIS, TFS, and Canvas.

Sitefinity CMS:

- Recreated the website with Responsive UI

MS Dynamics CRM:

- Optimized inquiry/lead management
- Student services- Recording existing as well as new student data

SQL Server Reporting Services (SSRS):

- Replace Excel reports with SSRS
- Generate and execute complex reports at runtime to understand key data
- Help in framing decisions related to business expansion

SQL Server Integration Services (SSIS):

- Ensure seamless data flow between CRM and CampusVue
- Integrate these two crucial applications effectively

Team Foundation Server (TFS):

- Ensure seamless data flow between CRM and CampusVue
- Integrate these two crucial applications effectively

Canvas

- Organize and structure content in a desirable manner
- Upload course modules to Canvas tool

Technical Gamut: The Upper Hand

Competence in Sitefinity:

We have an excellent record of executing Sitefinity projects. Our expertise in developing user-friendly sites in Sitefinity, allowing third party integration, ecommerce customization, intranet development, managing content flow from creation to publishing have helped the client considerably. We have employed the best skill sets in Sitefinity for this. The site development was done in a modular fashion, which helped us meet the expectations of the client.

Capabilities in MS Dynamics:

Suyati's proficiency in Microsoft Dynamics CRM has tremendously helped the client in enhancing their operational efficiency. With our know-how in Dynamics CRM, we enabled the automation of lead assignment process and extended this feature to report generation activity as well. Our solutions are spread across marketing, sales, and service and we encourage predictive customer engagement using analytics.

Solution Highlights

- Revamp of the client's site based on future needs of the organization.
- Recreated the client's website using Sitefinity in a modular approach. The new responsive design was well received by the client.
- Assisted the client in uploading various online courses to Canvas tool. So far, we have uploaded 17 courses successfully.
- Optimized the lead assignment process. This was implemented as a value-add. Major rework was done on Lead Management workflow to achieve this optimization.
- Though we started generating reports from database, which users can view live, currently they are fetched on weekly basis.
- Provide comprehensive technical support to the client on their:
 - ★ **Website**
 - ★ **CRM**
 - ★ **Report generation**
 - ★ **Uploading and organizing course content in Canvas tool**

The Results

- 1 Received excellent feedback from the client for the new website.
- 2 Optimization of lead assignment has alleviated the lead management issues.
- 3 Witnessed great improvement in speed, quality, and performance of the site.
- 4 Successfully rolled out releases for MS Dynamics CRM.
- 5 Admin functionality has become easily manageable with the proposed modular approach.
- 6 New website has turned out to be more attractive and user-friendly with responsive UI designs.

Value-Adds

- Provided feedback on solutions requested, to explain to users if the given solution is optimal or if it can be improved to suit their preferences.
- Suggested to create documentation for technical solutions and this idea has been well received by the client.
- **The DGT factor-** More scope for interaction with client and this helped us gather requirements from different stakeholders and discuss their pain points and deliver services according to their priority.

Progress & Team Composition

Suyati's expert team comprises one UI Expert, one .NET developer for Sitefinity, two Dynamics CRM developers, two resources for content creation, and one resource for database reporting. The engagement has been in place for around one year, and we continue to extend our support to the client in developing and designing solutions.

List of successful releases:

Our team has successfully rolled out three consecutive releases:

- *The First Release* – Termed as Release 6, this stage witnessed the following developments:
 - ★ Support for **Cascade delete** feature for some of the complex relations between records
 - ★ Email form modified to **disable Auto-save** function
 - ★ Standardization of inputs: **Salutation** and **Suffix** options were converted to dropdown, and data was migrated
 - ★ **Activity forms** were modified as part of UI enhancements.
- *The Second Release*: Release 7 focused on these major changes in CRM system:
 - ★ Improved **lead tracking** by source
 - ★ **Check for Re-Inquiry** option added to avoid multiple users working with same lead
 - ★ Closing large number of old activities, based on lead status
 - ★ New workflows added to handle status change on leads
 - ★ Support for other teams added in **Lead Assignment** (dedicated enrollment team members for specific programs)
- *The Third Release*: Release 8 was the most recent release, which covered:
 - ★ New version of Lead Assignment
 - ★ Implemented check for leads created by BOTs (Build-Operate-Transfer method)
 - ★ Support for Knowledge Base (KB) Article to make lead process easy for users
 - ★ Modifications to Forms as part for UI enhancements and ease of use

About us

Suyati provides marketing technology and integration services for companies that wish to combine the best of breed solutions and create a unified approach to customer acquisition. This unified digital marketing approach requires system integration between various CMS and CRM platforms, and a slew of e-commerce, Marketing Automation, Social Media Listening, email and social marketing, and customer service systems. Our specialized knowledge in Salesforce, open source and .Net based systems enables us to build effective custom integrated solutions for our clients.

Suyati's custom technology solutions have been deployed in companies in the US, Western Europe and Australia, and have helped many enterprises leverage the web/cloud/mobile technologies to acquire customers through integrated digital marketing. Suyati is based in Chicago with product engineering capability out of the US and India.

To learn more visit:
www.suyati.com/services

Get in touch:
services@suyati.com