



CASE STUDY

Working with Pamoja to optimise workflow, improve reporting, and increase sales team usage of the recently implemented Salesforce CRM system - to free up time to sell!

Pamoja

Pamoja is a group of progressive digital learning experts with a mission to broaden access to high quality education on a global scale. They offer International Baccalaureate (IB)-approved course content to schools, which is either taught by Pamoja teachers online or by the school's teachers in the classroom. The courses are accessed by 4,000 students in 750 schools across 110 countries, and cover 21 IB Diploma Programme subjects.

Pamoja provide the platform and tools to elevate the role of the teacher; flexible, blended learning strategies free teachers from lower order activities such as content planning and creation, enabling them to focus on the individual learning needs of their students. This means that learners benefit from a more personalised learning experience, with teachers providing support at the point when they need it.

The problem

Pamoja migrated to Salesforce in November 2015 and after a bedding in period they realised they were not reaping the expected benefits from their Customer Relationship Management system (CRM).

User adoption was low so the aim was to increase usage of the system particularly by the Sales team. To achieve this there was a requirement to design and develop an optimised workflow and improved reporting. It needed to be easy to use, cut down on administration and free up the Sales team to spend time selling!

The solution

Ribbonfish were engaged to review the business processes and workflow, make recommendations, and adapt and enhance the Salesforce application accordingly. Ribbonfish worked with the Pamoja project team challenging and questioning the assumptions behind the existing workflow in order to improve – and in many cases – simplify the processes.

The project team worked together to identify the improvements needed:

- Make use of Salesforce best practice
- Workflow changes to remove leads and provide more transparency as to the status of the opportunities
- Opportunities rollover
- Simplify the logging of activities – more streamlined
- More granular scheduling including time as well as date
- Improving the UI to make navigation simpler and encourage user adoption
- Opportunities by season / year – at a glance value of opportunity by account

The outcome

The enhancements were made quickly and efficiently over 3 deployments, working in close co-operation with the Pamoja project team. The work was completed to quality, cost and time with any issues arising resolved swiftly and effectively.

The changes have been rolled out to the sales operations team and the sales force. User adoption has increased as they realise the benefits of a simpler, improved workflow. The sales team are freed up and can focus on selling rather than administration.



“Right from our initial consultation, Ribbonfish understood our business needs. Not only were they able to offer advice on Salesforce but also on our business processes. The project was completed efficiently and on time. I would highly recommend working with them.”

Amy Wright, Business Operations Executive

