

## Leading global university enables meaningful student experience with improved student profiling & data accuracy

### Industry

Education

### Products & Services

Data Utilization

### Implementation Partner



Client is an internationally recognized research-led institution offering high quality teaching supported with real-time research exposure making their students the most sought after by the industry.

In order for them to continue to produce such high talented professionals, it was important to maintain clean and consistent student data in both CRM and their Student Information System (SIS).

### Challenges

- Disintegrated and disjoint ecosystem including Oracle Service Cloud (OSC) as the CRM platform for managing the Student Experience & SIS for managing the student information & other related processes.
- Need to have marketing and prospect data seamlessly flow from OSC to SIS, at the end of the Sales cycle for on-boarding. Thus, Student Information System continues to be a prospect master for all the active prospect data.
- Consolidated repository of prospect base as it is also possible that some prospect might also not come through the sales channel & hence might only exist in SIS.
- Capturing digital body language & 360° view of prospect. Prospect might have shown interest, more than once, through one of the multiple marketing channels and provided different contact details each time. Hence every active prospect might have none or more than one associated contact record in the Oracle Service Cloud.

### Solution

- Fast track approach to deploy a 2-way sync between active prospects from SIS as input to Oracle Service Cloud thus enabling a 2 systems sync & de-duplicating prospective student records. An out-of-box integration tool (designed & developed by CRM IT solutions) was proposed.
- Define and design relevant business rules to identify duplicates, in addition to the standard Service Cloud key fields. Once the primary contact record is identified, the integration tool offers the ability to merge all associated child data, across duplicates, with the primary one.
- A custom program to periodically look up SIS, using Web Services API exposed or file extracts, for incremental prospect records & use that as a trigger to launch the synchronization & cleanup process in Oracle Service Cloud.

- The program will look-up OSC to find a matching record, using business rules configured (e.g. a combination of fields like email id, first name/last name, address etc.).
- For the closest matching record found, update the Oracle Service Cloud record with details from SIS, including capturing the prospect ID from SIS on the OSC contact record, to be used for future synchronizations.
- For multiple matching records, apply the pre-configured business rules:
  - Identify the one which needs to be retained, (e.g. it could be the one where the most recent transaction has happened)
  - Auto-validate same prospect profile data as the record from SIS.
  - Update all configured child data records to the closest matching records, before deleting & purging the least matching records.

### **Benefits**

- Periodic clean-up for clean and consistent student information within the Oracle Service Cloud system.
- Restrict inaccurate and duplicate records (student Information data) flows into Student Information System.
- Automated business rules to minimize the manual work
- Quality de-duplicated data for improved prospect management.