

Customer Story



## TCI Optimizes Salesforce and Identifies a Long-Term Partner with AllCloud



TCI (Teachers' Curriculum Institute) is an award-winning K-12 online publishing company designed to bring learning alive in classrooms. Founded in 1989, TCI offers curriculum for students and teachers based on a set of proven teaching strategies to achieve consistent, positive classroom results while being mindful of educational standards.

### The Challenge:

TCI had used Salesforce for several years, contracting out small projects to various partners as they came about. While this approach helped TCI fill immediate needs, it meant the organization wasn't taking steps to fully optimize and grow its Salesforce footprint. This realization led TCI to evaluate several new Salesforce projects and identify a single partner with whom it could work long term to maximize the value of its investment.

### The Solution

Upon identifying the opportunity to strategically optimize and grow its use of Salesforce, TCI began the search for a long term partner, which led them to AllCloud, a Platinum Salesforce Partner. TCI chose to work with AllCloud on three initial projects to determine if it was a good fit:

#### **Sales Optimization Focused on Lead Capture**

First, TCI partnered with AllCloud to improve its ability to capture new website leads, standardize the lead capture process by eliminating the use of multiple forms and seamlessly bring information on new leads into Salesforce.

AllCloud helped TCI streamline the process for capturing top of funnel leads by using a web to lead form with Salesforce, ultimately making it possible for the TCI team to quickly act on and maximize the value of new web leads.

#### **Streamlined Service Through Community Development**

Next, AllCloud helped TCI successfully launch a new Salesforce Community to serve as a customer-facing knowledge base. TCI had already developed the Community with a previous partner, but a subpar user experience pushed the team to ask AllCloud for help.

In three weeks, AllCloud helped TCI optimize the Community to make it more user-friendly by introducing best practices around formatting data, text and headers. Critically, AllCloud made these best practices scalable, which empowered the TCI team to grow the existing Community and create new ones on their own.

The successful rollout of these Communities helped TCI customers better self-serve, allowing the customer service agents to use the Community to both deflect and quickly resolve about 80% of their call tickets during TCI's busiest season, resulting in cost-savings.

## Improved User Experience with Lightning and Pardot Migrations

Finally, TCI tasked AllCloud to help improve the user experience for employees by migrating from the Classic Salesforce experience to Lightning and by replacing a legacy marketing automation solution with Salesforce Pardot.

On the Lightning side, AllCloud led a fast rollout and several "train the trainer" training sessions that resulted in 100% adoption of the new interface by TCI's existing Salesforce users.

Meanwhile, AllCloud helped TCI consolidate all of its marketing emails into a single system with Pardot. This consolidation eliminated challenges for the marketing team, who had previously operated out of two email systems, and improved marketing data by connecting it to sales and service data. Along the way, AllCloud empowered TCI to take full advantage of Pardot by:

- Delivering a roadmap on how to best use the solution throughout the pre-sales cycle
- Integrating Pardot into proprietary TCI technology to enhance the data available to marketing users
- Introducing Account to Contact matching logic to automatically connect teachers to the appropriate school and district

## The Result

Working with AllCloud on these projects helped TCI transform its use of Salesforce and identify a go-to partner for more long-term optimization efforts.

Specific wins from these initial projects include improved visibility for sales users into Service Cloud, increased efficiency due to a better, more intuitive layout with Lightning, high adoption of the Lightning interface, more meaningful data flowing into marketing campaigns and the ability to measure marketing impact for the first time through Pardot.

Looking at the big picture, TCI found so much value in AllCloud's expertise that the team has brought on AllCloud for Salesforce Managed Services to continue the partnership long term. TCI reports that this decision was easy given AllCloud's track record of success, regular and effective communications and proven Salesforce expertise.

*// AllCloud is not only very knowledgeable about Salesforce, but they also always take the time upfront to understand our business and our unique needs for each project. This upfront investment allows them to develop a clear project roadmap that helps both sides stay on timeline and on budget when it comes to implementation -- and that's something not many companies can do.*

Ellen Hardy, Chief Operating Officer at TCI

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