

Scribe Customer Case Study

Keeping customers happy while driving higher revenue



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Sean Sweeney

VP Sales

CampusFundraiser

www.campusfundraiser.com

◆ Environment

Salesforce

SQL Server

◆ Challenge

Connecting sales with students during the decision making process

Update constantly changing database in Salesforce

◆ Solution

Scribe Insight

The Scribe Adapter for Salesforce

◆ Benefits

Increased revenue

Operational efficiencies

Improved customer interactions

◆ Scribe Partner

Harvest Solutions

www.harvestsolutions.com



The Business of Integration

When college student groups, sports teams, and special interest groups need an easy, proven way to raise money for member dues, equipment, house debt, charity, or any other purpose, there's only one name to remember: CampusFundraiser. As its name implies, this unique company specializes in campus fundraising programs and has raised millions of dollars for student organizations of all types and sizes. However, managing long-term relationships with college groups is no easy matter. Student leaders change frequently—sometimes each semester. And naturally, every four years, there is a complete turnover of the student body.

To keep up with constantly changing contacts, Campus Fundraiser uses Salesforce, which enables the company to manage people and processes from initial lead through to the close of a sale. In addition, the company relies on a proprietary business application built on a SQL Server database. All initial leads are captured through the company's website, which feeds this proprietary system. The challenge for CampusFundraiser was to leverage all the critical account information in its proprietary system for use in Salesforce so its fundraising consultants could manage the lead and ultimately close the sale. The answer to that challenge was integrating the two systems using Scribe Insight.

With Scribe Insight, details from new leads captured in the company's SQL Server application are automatically integrated with Salesforce. As a result, CampusFundraiser consultants gain up-to-the minute information, enabling them to respond quickly and capitalize on the student interest while it is strongest.

“The speed that lead information is transferred from our SQL Server database into Salesforce makes all the difference in the world to our business,” says Sean Sweeney, VP Sales of CampusFundraiser. “The faster we can respond to a lead, the greater our chance of closing a sale. The fact is, students make decisions on impulse, so the sooner we know who has made an inquiry, the faster we can reach out to them and initiate the sales process. Sometimes it's just a matter of answering a question or clearing up a misconception; but regardless, speed is everything. If a day or two passes, the student may decide not to bother with a fundraiser at all, so our job is much harder. But with the Scribe integration, we sometimes have leads pop up in Salesforce while the student is still on the website, so we can act practically in real time, which improves our success rate dramatically.”

Technical Benefits

◆ No coding

Scribe Insight provides a graphical user interface eliminating the need for any coding

◆ No duplicates

Scribe Insight integrate a SQL Server database with Salesforce to create a single customer record

◆ No worries

Scribe Insight runs perfectly and reliably so users have the data they need, when they need it

◆ No limits

Scribe Insight has the flexibility to meet a full range of business requirements

More complete data drives more effective sales

Both the proprietary SQL Server application and Salesforce play a critical role in CampusFundraiser's business. The proprietary system provides many unique functions that allow the company to tailor each program to the individual needs and personality of each student group it serves. Salesforce provides the relationship management and sales tools to track a current account through the entire sales process, as well as pursue renewed business. For example, details such as previous fundraising events done for the group and the amount raised, as well as a complete history of communication points, contribute to very effective sales efforts. The key is ensuring that account details in Salesforce are consistent with the latest information in the company's SQL Server application.

"By integrating account details from SQL Server with Salesforce, we can maximize the effectiveness of our sales and ensure the best results for our customers," says Sweeney. "Knowing what we did last semester, or last year, for a group allows our fundraising consultants to personalize their calls and motivate the current contact to move forward with a new fundraiser. The Scribe integration ensures we have not only current account information, but also complete historical information, which is absolutely critical to the success of our business."

Simplifying integration with drag-and-drop ease

To implement Scribe Insight and create the integration, CampusFundraiser called upon a consulting firm with specific expertise in both Salesforce and Scribe Insight—Harvest Solutions. With many years of experience in customer relationship management and extensive training in Scribe Insight, Harvest was the ideal choice to address Campus Fundraiser's needs.

"We were impressed with Harvest's experience and felt confident that their experience with data integration using Scribe Insight would produce the results we needed," recalls Sweeney. "From our perspective, the integration went very smoothly—we got the information we needed in Salesforce and our consultants have been going strong ever since."

The key to achieving a seamless integration was the built-in intelligence of Scribe Insight, which enabled Harvest to simply specify a source—the SQL Server database—and then specify a target—Salesforce. For both ends of the integration, Scribe Insight presented all available field options, which enabled Harvest to simply drag and drop the source field to the target field and establish the link.

One of the unique challenges, however, was that a single item in the SQL Server database often had to be integrated into multiple items in Salesforce—a challenge Scribe Insight handled with ease.

“With Scribe Insight, it doesn’t matter what the data is or where it comes from, we could put it all in the right places in Salesforce,” explains Jon Simmons, Integration Consultant at Harvest Solutions. “A student enters his or her information at the website, Scribe picks up all this information as a single record, and then the integration parses it out to the appropriate records and fields in Salesforce. For example, one record from SQL Server may become three separate records—contact, account, and opportunity—in Salesforce. Scribe not only puts the data in the right place, but also links all the associated records. So if a user clicks on a specific contact, they can also see which group the contact belongs to and what opportunity that group presents.”

Scribe Insight makes integration projects such as this fast and easy by eliminating the need for custom code—something Harvest has plenty of experience with. “Any time you have to write custom software, you’re essentially re-inventing the wheel to some extent,” observes Simmons. “It’s a huge amount of time even when code is reused, and there’s always the chance for errors. Then, if you have to go back and make changes at a later date, you have to figure everything out again. Scribe Insight is such a great tool because it saves a lot of time in the development process, as well as the long-term maintenance of the project. There’s no coding and compiling—it’s just a matter of pointing and clicking.”

Regardless of the underlying sophistication of the software, ultimately Scribe Insight’s capabilities mean only one important thing to Sean Sweeney: “By integrating our SQL Server application and Salesforce, we can be sure our fundraising consultants have the most current and complete information possible. That means they can be more effective in helping our student customers choose a successful fundraising event—and they can drive increased revenue for CampusFundraiser.”

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Jon Simmons
Integration Consultant
Harvest Solutions

Read what other customers are saying about Scribe Insight:

"Now that our CSRs have access to this data, they can make more meaningful calls, to exactly the right people... which results in better customer care."

**Frank Scott – CRM Integration Manager – Adesa – www.adesa.com
*Integrating Salesforce with Oracle***

"Scribe Insight was quick to deploy and configure to our specific needs. Its flexibility also means that we can use the product for a variety of other data loading and integration projects as our business continues to grow and expand."

**Spike Xavier - Staff Developer - Interface Technical Training - www.interfacett.com
*Integrating Salesforce with Legacy Systems***

"CIT has over 1300 users across 18 distinct Sales Groups with a wide variety of data integration needs. These teams rely on our ability to load and manipulate large amounts of data quickly and accurately. Scribe provides an efficient data integration platform which allows us to manage the transformation of data from multiple source systems into Salesforce. It provides the ability to comply with our internal data strategy requirements and platforms. In addition, Scribe consistently provides outstanding and flexible support for the Insight product."

**Robert Merrell - Senior Associate - The CIT Group - www.citgroup.com
*Integrating Salesforce with multiple Legacy Systems***

"Using Scribe Insight, we were able to seamlessly integrate the order process between Salesforce and Dynamics GP. And best of all, we were able to accomplish this with limited internal staff, in a few short weeks, for just a few thousand dollars."

**John Snead – Director of Beer Operations – Karl Strauss Brewing - www.karlstrauss.com
*Integrating Salesforce with Microsoft Dynamics Great Plains and Blackberry phones***

"Scribe's product was intuitive and easy to use, and the training and support from Scribe was better than excellent."

**Frank Scott - CRM Integration Manager – Adesa - www.adesa.com
*Integrating Salesforce with Oracle***

"The Scribe integration has enabled us to increase efficiency by as much as 20 percent. For our telemarketers, this means they can complete more calls, more quickly."

**Jack Sands – Chief Executive Officer – Intrep - www.intrep.com
*Integrating Salesforce with Oracle and Mapquest***