

THE EDUCATOR COLLECTIVE

# Redefining Event Management in Education:

Educator Collective's Success Story with Salesforce

## CASE STUDY



**Great Service and Partnership with Education Non-Profit Needing Skilled Salesforce Experts**

The team at Marketing Automation Corp are unmatched in their ability, dedication, and nimbleness. I've been incredibly impressed with their professionalism, timeliness, and willingness to go the extra mile.

– Ruthie U.

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## The Client

Educator Collective is a nonprofit organization dedicated to serving a professional community of educators across Dallas-Fort Worth.

By offering TEC memberships at no cost, they provide educators with the opportunity to enhance their skills in three key areas: community engagement, leadership development, and well-being.

Educator Collective aims to foster a supportive and growth-oriented environment at every touchpoint. Scalable systems are paramount for achieving this goal—and that's exactly why Educator Collective came to us.

## The Problem

Our client faced their fair share of hurdles in managing their events.

**Without a dedicated event management tool, they found themselves tangled in the all-too-familiar tedious processes for events:**

- Sending out invites and email reminders
- Managing waitlists
- Confirming attendance

*...and many other activities—all done manually.*

These tasks required too much manpower, especially as the organization grew.

Additionally, this hands-on method was a recipe for human error.

Educator Collective's team was unable to accurately identify the attendees of the events, so they resorted to double-checking every waitlist.

They were in desperate need of a hero—a system that could effortlessly automate these tasks, blending both time-scheduled and action-triggered processes.



## The Solution

Our client was looking for a solution for managing events through Salesforce, which helps them keep precise track of contact interactions and automate interactions.

We took these challenges head-on, crafting an all-encompassing event management system within their existing Salesforce instance.

The project called for the creation of automated processes linked to our client's Campaign object, enabling the dispatch of communications to Contacts triggered by specific events.

The automated system would manage events based on a set of predefined rules. We integrated a few systems with Salesforce and created the necessary automations.

### **Salesforce + Mailchimp Integration**

We brought Salesforce and Mailchimp together to create email communications that feel personal, yet just as powerful. The integration enables Educator Collective's administrators to effortlessly create list segmentations in Mailchimp, as well as seamlessly sync with Salesforce contact records.

Additionally, this integration offers the ability to access campaign reports, manage subscribers, formulate custom queries, and much more.

Overall, it enhances efficiency and effectiveness in managing communications.

### **Salesforce + FormAssembly**

We connected Salesforce with FormAssembly, making the collection of member data as seamless as a perfect playlist.

When a form is completed, the data is sent to Salesforce and an event is created, which dynamically creates or updates records.

By weaving Salesforce together with a handful of other systems, we eliminate manual data entry and avoid duplicate records, bringing a level of automation and scalability that feels like a breath of fresh air.

### **Key Automations**

We automated everything from invitations, waitlisting, calendar invites, registrations, and gathering feedback via surveys, all through Salesforce, turning complexity into simplicity.

Best of all, Educator Collective's admins have the flexibility to fine-tune their automation by updating event triggers and processes as needed, giving them full control over their events.



## The Outcome

The results of MAC's work were nothing short of transformative.

Educator Collective's whole event management process is now completely automated. Activities that require human intervention are minimal, drastically cutting down on the need for manual effort.



In fact, our efforts save at least **50 hours** of manual work per event.

And it gets better—now, our client can grow and attract more attendees without equally increasing its manpower.

The reliability of their data has skyrocketed. Every critical metric is now captured flawlessly, thanks to smart integrations and automation. Educator Collective's team can leverage this data to implement strategies to increase attendance at future events.

The administrators have systems that work in an integrated and harmonized way, allowing them to focus on other critical areas of the organization.

## Want to Cut Manual Work and Automate Your Processes? Tap Into Our Expertise

Do you see yourself in a similar situation where you need to automate your processes and increase efficiency?

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