



The Value of Centralized Information for Strong Community Relationships



A unique school of interspiritual education and professional training, One Spirit Learning Alliance is deeply dedicated to the value of community. In fact, healthy and effective personal and professional relationships are at the very foundation of the organization.

To honor this commitment, the school embraces the power of technology and automation to better connect and understand people. They rely on Salesforce® to centralize their student data, which enables staff across the organization to have a 360-degree view of student records and interact with individuals on a more personal level.

About One Spirit Learning Alliance

One Spirit Learning Alliance is an interspiritual institute that offers in-depth experiential education and professional training to teach and explore the common core of ancient and emerging human wisdom; train and ordain interfaith/interspiritual ministers; prepare spiritual leaders, counselors and clergy to serve diverse communities; and support and nurture individuals' ongoing spiritual development, growth, and service to the world.

CHALLENGES:

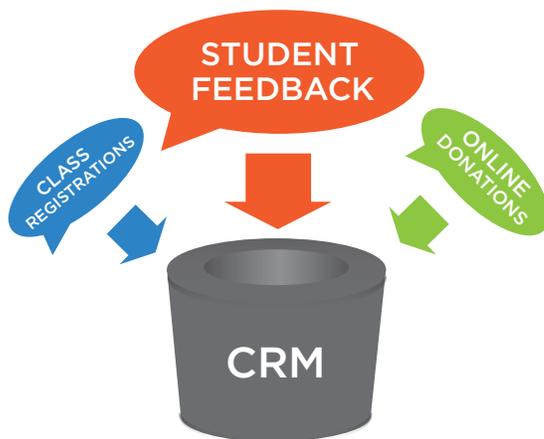
- Capture student feedback and satisfaction ratings, and connect the data to individual CRM records.
- Reduce manual processes and human error with automated workflows.
- Streamline and automate the school's admissions processes.

SOLUTION:

- Use Clicktools and Salesforce to collect, centralize, and act on student feedback.
- Exceed initial goals by leveraging the integrated solution to accept online donations and class registrations.
- Use Clicktools Document Upload feature to save time and money associated with admissions processes.

THE NEED FOR FEEDBACK: Are Students Satisfied?

Seven years ago, One Spirit Learning Alliance was looking to garner feedback and satisfaction data from their students. With all of their student information already housed in Salesforce, they wanted to leverage that existing data and connect individual feedback to the CRM record. After comparing various solutions, they selected Clicktools to create, deploy, and manage their customer satisfaction surveys. They quickly became adept at using Clicktools to collect, centralize, and act on data automatically, while leveraging the power of Salesforce.



MORE THAN SURVEYS: Capturing All Kinds of Input

As time went on, Gordon Brode, One Spirit Learning Alliance's Director of Operations Strategy, realized other ways to leverage Clicktools to automate processes and save this forward-thinking non-profit both time and money.

"We use Clicktools for everything," says Brode. "We are always looking for ways to use technology to make things smoother and appear more seamless to customers/students creating customized and personal interactions. Clicktools allows us to have a more robust, high-touch relationship with our customer without the need for a specialized or custom on-premise system."

Today, Brode uses Clicktools for capturing student feedback, taking online donations, and collecting class registrations. Clicktools has replaced other online form applications that were not integrated with Salesforce, saving Brode and his team countless hours of manual entry that resulted in less than 100 percent accuracy. Now, everything is automated, reducing human error and weeks of manual labor during registration season.

FUTURE OUTLOOK: Additional Improved Processes

Going forward, One Spirit Learning Alliance has begun an initiative to take advantage of Clicktools' attachment upload feature, in order to streamline and automate the school's admissions process. All admission applications will automatically create new Salesforce records and attach the entire admission form to that record. With Clicktools, Brode and his team easily accomplished this without adding any technical resources or custom coding.

"The only limit is our imagination for ways to engage and touch our customers," says Brode.

The organization looks forward to seeing ongoing benefits with Clicktools and Salesforce, appreciating the value that the integrated solution provides in building strong, long-lasting relationships with their learning community.

FOR A FREE DEMO, CONTACT THE CLICKTOOLS TEAM

WEB: www.clicktools.com EMAIL: sales@clicktools.com US: 1.800.774.4065 UK: 0800 0432587