formstack · salesforce

Streamlining the Student Experience

Managing the student recruitment and enrollment lifecycle for prospective students requires multiple forms, processes, and communications with potential students, parents and academic counsellors. When Simon Fraser University (SFU) was looking for a digital solution that would meet their complex data workflows, Formstack for Salesforce enabled them to streamline the student experience while capturing the data they needed right within Salesforce.

SFU | SIMON FRASER UNIVERSITY

Born in 1965, SFU has become Canada's leading comprehensive university with vibrant campuses in British Columbia's largest municipalities — Vancouver, Burnaby and Surrey — and deep roots in partner communities throughout the province and around the world.

Industry
Higher Education

Customer Since
2019

Use Case
Student Data Collection

Products
Forms for Salesforce

Features
FOIPPA Compliance, Dynamic Prefill, Automated Alerts

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Challenge

SFU didn't have a method for collecting lead information from prospective students directly in Salesforce, outside of a few laborious spreadsheet imports, which were very time consuming. They also didn't have an easy way to collect required information or documents to help answer cases. Any software they use must meet FOIPPA compliance. Due to the ever-changing needs of their recruitment office, the ability to have functional users outside of their IT department create and adjust forms was a business need.

FOIPPA
compliance required for any software used by SFU

Solution

SFU was able to create a digitized prospective student collection method, as well as organize the case questions forms with required information (and collect attachments), and more, with the Formstack for Salesforce solution. Since Formstack is FOIPPA compliant, it met SFU's compliance standards. With Formstack's prefill capabilities, any future surveys or forms sent out to the students are prefilled with the student's information, which allowed them to not have to ask the same question multiple times, and enabled SFU to build better relationships and engagement with students.

"

Formstack allowed us to create an engaging prospect strategy, and allowed our functional users to create forms. It's easy to use and effective!

Sean McKenna
Director, Business Analysis and Assessment
at Simon Fraser University

The Results

| Eliminated manual data entry and established new processes | Enabled student engagement through digital forms | Improved data security with FOIPPA compliant processes | Consolidated software within their tech stack | Time savings and streamlined communications | Easy adjustable forms, direct to objects and fields |

formstack