CASE STUDY

Corey Broderick
Consultant, Developer

Email: info@coreybroderick.com
Site: www.coreybroderick.com
Tel: 1-647-367-1601

HIGH MOUNTAIN INSTITUTE

CLIENT SUMMARY

Opened in 1995, High Mountain Institute (HMI) has become a preeminent leader in inspiring confidence, teaching leadership, and supporting the academic growth of adolescents and young adults. Students come to HMI for life-changing experiences during their high-school semester, gap program for high school graduates, or middle and high school summer programs.

HMI is a 501 (c)(3) nonprofit organization.

PROJECT SUMMARY

Start: April 2017

Work Proposal: +450 hours

Platforms: Salesforce, Stripe, MailChimp, Docusign, Google G Suite, Wordpress
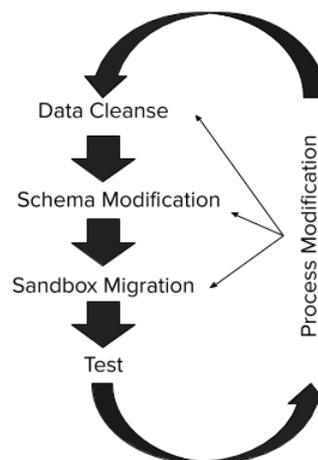
THE CHALLENGE

After 22 years of operation, HMI was searching for an integrated system that would follow the life cycle of their students, from potential applicant through to alumni development.   HMI needed to build a system that would reduce the logistical burden of admitting and enrolling their student base, would integrate their client knowledge across different offices (Admissions, Registration, Development), and would be able to able to facilitate development opportunities.
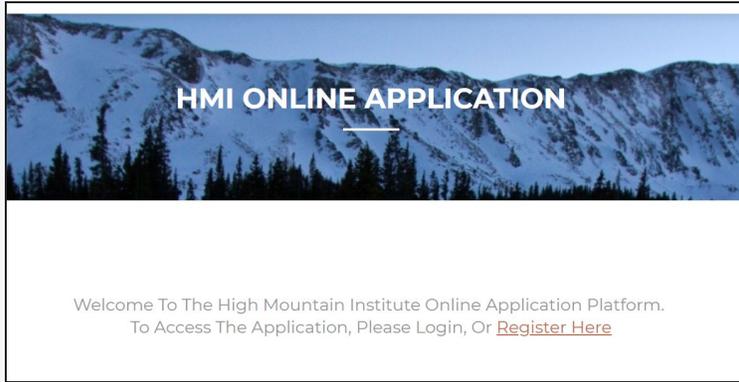
DATA MIGRATION

Data migration is the foundation of any successful CRM project. An automated migration process was created that cleaned 10+ years of data on the current system, as well as altered the underlying data schema to fit Salesforce NPSP households.

Collaborative investigation paired with iterative sandbox migrations meant not only a cleaned data set, but also facilitated the discovery of new data relations such as spouses, families, and organization affiliations.

ONLINE APPLICATION AND ENROLLMENT

HMI ONLINE APPLICATION

Welcome To The High Mountain Institute Online Application Platform. To Access The Application, Please Login, Or Register Here

Prior to Salesforce implementation, HMI had established Admissions and Enrollment processes that were effective, yet manually intensive. A custom system was developed that addressed the need to increase internal efficiency, while also maximizing potential applicant conversion.

The system is is served to applicants (and their respective guardians) via a extensively customized Salesforce Customer Community that integrates with GDrive, Stripe, and Docusign.

"We were immediately impressed by Corey when he took the time and care to understand our organization and our needs; from there, his keen technical skills and solution-oriented approach have gotten us through even the most complex situations. We are beyond grateful to have him on our team!"

Reed Holden

DIRECTOR OF DEVELOPMENT

DONATION FUNDRAISING

A custom donation platform was built upon Salesforce Sites that integrates with HMI's payment provider (Stripe), automates receipts, allows for recurring donations, and maximizes returns by allowing donors to cover the transaction cost of processing credit cards.

Workflow processes allow for automatic attribution of donations to the respective contact in Salesforce, as well as automated giving reminders.

Country
USA

ZIP Code
33030

Why are you donating to HMI?
Alumni support!

☑ As part of my donation, I'd like to cover HMI's transaction fees. The transaction fee is 2.2% of the amount, plus an additional $0.30.

TOTAL AMOUNT TO DONATE: $36.09

DONATE

RESULTS

HMI's solution increases efficiency in both Admissions and Development processes, provides real time insight, and helps establish data-driven strategy for growth.

+ **Real-time student conversion tracking**
+ **50% reduction in work hours per enrollment**
+ **416% increase in recurring donations in first 2 months**

Find out if solutions like this can help your organization.

Email: info@coreybroderick.com   **Site:** www.coreybroderick.com   **Tel:** 1-647-367-1601