

Using Salesforce and campusM to create better student journeys at the University of Plymouth

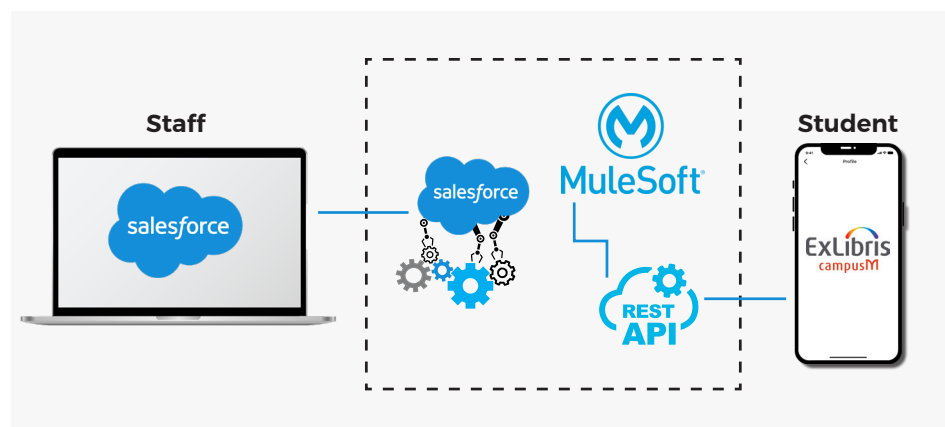
Executive Summary

The University of Plymouth (UoP) has been a campusM customer for over a decade. The institution's main goal with the app is to enhance the student digital experience. In recent years, UoP has used workflows between campusM and their customer relationship software (CRM), Salesforce (SF), to create student engagement records and impact individual student experiences based on these records. In this case study, we will provide a brief overview of how campusM and Salesforce are linked at UoP and how the digital experience and platforms team at this institution are using these systems together to benefit students.

How UoP Links campusM and Salesforce

The digital experience and platforms team at UoP, led by Rupert Frankum, define "flows" in their SF system. These workflows can be launched based on status and data changes that Salesforce gains access to from all other university systems, as well as by manual input. campusM has made endpoints available via the [campusM API Suite](#), and UoP utilizes these endpoints to automatically

- **Enable lecturers to send individual or group notifications to selected students**, authoring the message directly in Salesforce and delivered through their campusM app.
- **Update a role within the app**. UoP use the list of campusM APIs to make these updates, as part of their internal SF flow that was designed. As an example, if a student needs access to complete a daily register as part of their module, an additional role is added using the API all trigger by their enrolments within SF. The SF flow triggers the "Change App Roles" API to add automatically the role to the user, and also triggers a roles refresh.



“Bringing together Attendance and Location Check-in data into the CRM allows us to better support students.”

Rupert Frankum

These workflows empower UoP to send automated, targeted information to specific students through role changes and notifications. *“We love the flexibility that is available to us via the campusM endpoints,”* says Frankum. *“We wouldn’t be able to use a standard product integration to do what we do with Salesforce and campusM, because a product integration has a bunch of predefined settings that we can configure, but that’s it.”*

To date, these workflows have enabled lecturers to make direct and targeted interventions with students through notifications, whilst enabling over 500 role changes based on interactions in their CRM.

Using campusM/Salesforce workflows to support students in real time

“Bringing together Attendance and Location Check-in data into the CRM allows us to better support students,” says Frankum. This data allows university administrators to see who’s engaging, and where there’s an indication in that data that they may want to intervene. Once all the data points are combined within SF, administrators can write reports to wellbeing staff or trigger actions within the app, such as a push notification, to offer immediate and targeted assistance to a student who appears to be struggling.

“We know students are getting fed up with their email, and don’t always check their inbox,” shares Frankum. *“A notification is different, it can be dealt with wherever, whenever, even in transit.”*

campusM by tile clicks at the University of Plymouth,
January 2023 - October 2023

Check-Ins 209K	DLE 620K	Emails 380K	Timetables 500K	Maps 9K
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Tile clicks grew by **150,000** as compared to the same period last year.

Future plans for leveraging campusM/Salesforce workflows

Driving tasks from Salesforce to campusM

Creating prepopulated tasks within SF that faculty/administrators can assign to a student within Salesforce, which would then generate these tasks within the app. As an example, if a student is struggling with certain aspects of their module, SF could trigger tasks that appear within a student’s app such as: *“Go and see student services, they’re here to help. Ask for [Name].”*

“This is the way forward,” says Frankum, *“What this could do for individuals is amazing.”*

Making induction easier for students

Frankum would like to use prebuilt lists to trigger useful tasks within campusM for incoming students, such as:

- *“Go pick up your ID card”*
- *“Make sure you can access your timetable”*
- *“Make sure you know where your first lecture is taking place”*



Enabling digital ID card access to buildings and services

“Salto is our access control system,” explains Frankum. “We want to be able to use the campusM digital ID card to replace the physical one to access building and services.”

Guiding students through their degrees with campusM

The extensible nature of campusM through APIs is empowering UoP to integrate its specific business processes and flows with the app, allowing the university to target students with personalized digital experiences. In addition to the campusM product integrations and out-of-the-box functionalities, the ability to tie campusM into the CRM is enabling Rupert Frankum and his team to deliver automated, customized notifications and roles that drive action.

