



CUSTOMER CASE STUDY

Enhancing Student Engagement: University Boosts Conversions Up to 5% with SugarCRM



Since 1975, [Sofia University](#) has helped its students focus on mind, body, and spiritual development of self through a focus on transpersonal psychology. With campuses in Palo Alto and Costa Mesa, Sofia U offers programs in psychology, business administration, and computer science.

The university is also very student—and community—minded. But it's difficult to keep the focus on individuals when multiple systems keep you from cohesively tracking student interactions across various stages of their educational journey. To prioritize student experiences, Sofia U needed to automate routine tasks like tracking lead and student communications while improving efficiency for various teams across the organization.

Industry ///

Higher Education

Location ///

Palo Alto, CA

Website ///

www.sofia.edu

Prioritizing the Student Experience Requires Unified Data

Sofia U is no stranger to cloud systems. It previously used HubSpot for lead management, Constant Contact for email marketing, Eventbrite for event management, and Element451 for higher education CRM. Yet, these systems didn't "talk" to one another. Users had separate logins across dozens of tools.

Despite being responsible for contacting prospective student leads, Sofia U's admissions team had difficulty tracking its outbound communications.

"Half of our day, we're on the phone," said Ashley Simon, Senior Admissions Counselor at Sofia University. "I don't have time to manually set things up or communicate one by one with each individual record."

Counselors regularly interact with 10,000 enrolled students via email, Zoom, Microsoft Teams meetings, and even a chat widget on the school's website to discuss the right classes they should be taking or how they should start preparing for a career.

But the marketing team had no visibility into when a student was last contacted and didn't want to duplicate messages. Manual tracking and checking in with other teams took up a large portion of employees' days.

"I would have to manually check or contact someone from the marketing department," said Ashley. "But they're so incredibly busy, I should be able to look at all that information myself and not contact them every single time."

Sofia U was specifically looking to enhance its existing automation capabilities to increase team productivity and data visibility. It also needed a partner that could lend helpful support whenever its teams needed help.

Sofia U found it difficult to accomplish its core mission of weaving human experiences into the student lifecycle without centralizing and automating interaction data in one place. Ashley joined the university's marketing and admissions leaders in identifying their biggest pain points and what they wanted in a new system, including:

- Integration capabilities and the ability to work in a single system
- An intuitive interface that would promote user adoption
- The ability for teams to communicate seamlessly within the system instead of using another platform for messaging
- Shared visibility so admissions can see email nurture page forms and marketing can see the entire lead nurture process

Sugar Sell and Market Together Enables Greater Productivity

After a thorough search, the team at Sofia U selected Sugar for a single place to track leads and communicate with students. Multiple departments typically mean multiple systems and instances. But with [Sugar Sell](#) and [Sugar Market](#) together, CRM and marketing automation are in one place for full-team access and visibility.

Implementation of Sugar Sell was smooth and timely. Despite not having a marketing or technical background, Sugar's step-by-step guidance and

"With Sugar, I have the power to create my business process. In other systems, I would have someone else do that for me, but I wanted to learn to set up the automations and lead protocols myself."

—ASHLEY S.

Senior Admissions Counselor,
Sofia University

regular communication gave Ashley a clearer understanding of each step of the process.

Now, every digital lead or student interaction maps back to Sugar for effective tracking. Sugar Market forms are embedded throughout Sofia U's website. Once filled out, the information is stored directly in Sugar Sell for follow up. Automation and field mapping assigns students to specific counselors based on their primary program of interest. From there, counselors can conveniently send emails to prospective students or individual follow-up messages through a notes module.

The system tracks every email, chat, or phone call a student receives. This way, users across departments are aware of the "last interaction date," a custom field Sofia U uses to track student engagement. Ashley and team can easily see if certain programs aren't logging as much communication, prompting them to send additional messages.

Counselors can send email blasts directly from Sugar Sell or use contact information that's already in Sugar Market for a seamless, integrated experience. A new events module allows the Sofia U marketing team to advertise upcoming events, see who responds, and plan more accurately.

Automation Lets the Platform Do the Work

Other systems are either heavy on customization or only out of the box. With Sugar, Sofia U can pick and choose what new processes to build.

"With Sugar, I have the power to create my business process," said Ashley, who is now the university's Sugar Administrator. "In other systems, I would have someone else do that for me, but I wanted to learn to set up the automations and lead protocols myself."

As an admin, Ashley also has access to deeper customization through the studio feature. Adding custom drop-down

options based on specific criteria allows for more advanced filtering in record view. When a counselor is overwhelmed with too many students, Ashley can update the business process at any time to reallocate lead assignments.

"We have several business processes that run in tandem," said Ashley. "I've never been able to do that before."

Sofia U's admissions and marketing teams save time, too. [Sugar Connect](#) allows users to work with student data without navigating away from their Outlook or Gmail. Users can import email communications directly into Sugar, making it even easier to update the "last interaction date."

When leaders need real-time reporting, they can filter by department, student information, or form fields like campus location. This is especially helpful for the admissions team as they project the anticipated student body in each city. Knowing students' home states and referral path to Sofia U aids the team and its education agents in recruiting efforts and attribution. Users can quickly and easily refresh reports for real time data based on newly set parameters.

Even in a larger grouping of records, [Focus Drawers](#) provide a list of students that's easy to hover over in an ID card-like format. Counselors get a quick list of who they need to work with that day—a feature that was unavailable in Sofia U's previous systems. This ensures they interact with the students who need assistance that day.


Ashley can also schedule reports to send to colleagues with information like number of leads per counselor for equitable distribution.

Sofia U Has Help at Every Turn

Sofia U's positive implementation experience prompted the team to turn to [Sugar Care services](#) for additional hours of Sugar Sell and Sugar Market guidance. This provided the Sofia U team with help building out landing pages for email nurture forms.

**"We have several business processes that run in tandem.
I've never been able to do that before."**

—ASHLEY S., Senior Admissions Counselor, Sofia University



Users like Ashley can also find guidance from Sugar’s robust public knowledge base of help articles and SugarU. The self-service resource empowers users with common vocabulary, how-tos, and screenshots. Learning continues with SugarClub where people can collaborate with a community of other users and even work toward certification.

“I had a very small amount of experience, and I’ve gotten better thanks to Sugar’s support,” said Ashley. “If I run into a roadblock, I know exactly how to fix it.”

“Sugar is always looking for ways to revamp the user interface in favor of what the customer wants,” said Ashley. “Any time I have feedback, I know I can give it to the team and they can incorporate it on their side.”

Better Student Experiences Boost Conversion

With lead and student data in one place, Sofia U teams across the organization have greater transparency into communication frequency. This allows the university to be more intentional about its message and increase the number of interactions per individual student.

More frequent and effective communication with prospective students has also led to increased conversions, specifically for Sofia U’s psychology programs. After implementing SugarCRM, the university saw an increase between 2–5% of prospective students converting to students of Sofia U across every program, namely its Masters in Counseling Psychology, which increased by over 5%. These improvements in conversion rates demonstrate the effectiveness of the system in attracting and converting prospective students.

Plus, with more time back in their days thanks to automation, Sofia U admissions and counseling teams can interact with more students in a shorter amount of time. Most importantly, more time back gives Sofia U teams the ability to focus on providing a better student experience. Already, students say they feel like the administration is communicating with them more intentionally.

“Customer service is literally the lifeblood of what we do,” said Ashley. “I’m able to get on a call with my students instead of crafting a manual email. Students are highly receptive to that.”

“Customer service is literally the lifeblood of what we do. I’m able to get on a call with my students instead of crafting a manual email. Students are highly receptive to that.”

—ASHLEY S.
Senior Admissions Counselor,
Sofia University

About SugarCRM

SugarCRM is how marketing, sales, and service teams finally get a clear picture of each customer to help businesses reach new levels of performance and predictability. Sugar is the CRM platform that makes the hard things easier.

Thousands of companies in over 120 countries rely on Sugar to achieve high-definition CX by letting the platform do the work. Headquartered in Silicon Valley, Sugar is backed by Accel-KKR.

To learn more visit www.sugarcrm.com or follow [@SugarCRM](https://twitter.com/SugarCRM).