CU I&E Submission: Flow Magic: Quantifying Business Value and Time Saved with Salesforce Automations [1]

Category

Technology

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Project Description

The CU Boulder Student Success Technology team has developed and manages over 150 Salesforce automations called Flows. These Flows enhance our internal and stakeholder business process efficiency, thereby enabling better support for student success at CU. In 2023, we set out to monitor and gauge total time saved by all these automations after being inspired by an article in an industry publication. We successfully built an additional automation we called Flow Magic to tally up and categorize time saved (measured in minutes) each time a Flow automation is triggered. This tool allows us a method to troubleshoot automations, identify processes that are contributing to the most business process efficiency, and provide real-time reporting on time and effort (and therefore money) saved by our business automations, such as automated Bulk SMS, Mass Email campaigns, case creation for Course Alerts or outreach, and system updates that improve data quality.

Project Efficiency

Since August 2023, automations in OIT have saved well over 500,000 minutes for users. One key efficiency the tool monitors is automated registration SMS reminders. Every term we send over 30,000 personalized messages. This was previously a manual process of reporting and uploading a CSV for each send. Now, an automation sends an initial text the day a student's registration window opens including merge fields with their window open time and a link to register, plus a 7 day reminder if the student still hasn't registered. This saved one OIT employee 22 hours of manual work in Fall 2023 alone.

Project Inspiration

In 2021, Salesforce expert Nana Gregg published an article sharing a way to measure the time savings of Salesforce automations. Inspired by Gregg, we set out to implement this in our own system. Gregg's article ponders "How do we know if we are creating efficiency [...or] improving quality?" We hoped to share with our stakeholders in student success - advisors, communicators, and others - how much of their time is saved by automations they never knew existed. In quantifying and making visible this automation "magic," we continually demonstrate the business value of work we do as Salesforce administrators and developers.

What Makes You Happiest about this Project?

This is an incredibly valuable tool to monitor and further enhance use of automations that collectively save hundreds of thousands of hours of employee time. We knew automation work was valuable, but this project demonstrates the vast extent of it. In 2023, we presented this project at a regional industry conference in Denver. We were able to gather valuable feedback and share with our industry community. We are thrilled to continue sharing the work and plan to submit a proposal to present at the industry's premiere international conference Dreamforce, with over 40,000 attendees, in 2024.

Additional Information

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