



## CASE STUDY

# Revitalizing Education: Maximizing Salesforce Investments with Strategic Innovation

*"To put it another way: Acquisitions that used to take EAB over 18 months from an end-to-end integration perspective now take less than 3 months"*

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## Making the Most of Existing Salesforce Investments

Nothing is more important than education — and EAB, formerly known as the Education Advisory Board, solidly supports that concept by providing research, technology, and services to support educational institutions. Its offerings help colleges and universities improve student experiences, increase institutional efficiency, and navigate the challenges of a rapidly evolving educational landscape.

### Background

EAB began implementing Salesforce tools back in 2017, before CPQ/Revenue Cloud provided all of the capabilities it does today. As a result, EAB had to build out a lot of coded workarounds, and incurred a bit of “tech debt” in that process.

That's where Sherpaneer was able to help. The strategic Salesforce partner was able to re-implement and re-architect EAB's existing Revenue Cloud, which allowed the organization to take advantage of more features and expand its reach.

“Our company addressed these issues by overhauling CPQ, integrating business unit pricing, restoring tool confidence, providing user training, and preparing EAB to tackle future organizational challenges effectively,” says Sherpaneer Managing Director Farnaz (Ferny) Bengali.

To help EAB deliver on those objectives, Sherpeneer executed what Ferny says was a carefully evaluated solution.

- ❖ First, it implemented a temporary hiring of sales operations personnel to alleviate the daily workload of sales staff struggling with quoting challenges.
- ❖ Next, it began to re-architect the Salesforce CPQ system, adhering to best practices and prioritizing scalability in the process.
- ❖ Finally, it also began rolling out and integrating the CPQ system with the ERP, enabling a seamless end-to-end quote-to-cash process.

## Key Elements of the EAB

1. **Research and insights:** EAB conducts research on various topics relevant to higher education — including student success, enrollment management, academic programs, and institutional effectiveness. These insights, best practices, and data-driven recommendations help institutions make informed decisions.
2. **Technology Solutions:** EAB offers technology platforms and tools to support student recruitment, retention, advising, and academic planning. These solutions often leverage data analytics, predictive modeling, and machine learning to help institutions optimize their processes and support student success.
3. **Consulting Services:** EAB provides consulting services to help colleges and universities with strategic planning, organizational development, program assessment, and change management.
4. **Professional Development:** EAB offers training, workshops, and conferences for higher education professionals to enhance their skills and knowledge in areas such as student success, leadership, and institutional effectiveness.
5. **Member Networks:** EAB facilitates peer-to-peer networking and collaboration among member institutions through various networks and communities of practice. These networks allow institutions to share insights, exchange best practices, and learn from one another.

## Conclusion

“By implementing a better CPQ system, Sherpaneer helped EAB improve metrics like quote turnaround time, quote accuracy, sales productivity, margin improvement, customer satisfaction, sales pipeline visibility, compliance and governance, and integration efficiency,” Ferny explains. “Overall, implementing a more efficient and utilized CPQ system was able to help EAB drive significant improvements in operational efficiency, revenue generation, customer satisfaction, and strategic decision-making.”

**The lesson here? Partner consultancies like Sherpaneer are able to uncover and demonstrate ways that organizations can make the most of existing Salesforce resources.**

**“Our partnership has proven that you can expand features and benefits of an existing Salesforce investment,” Ferny says, “without extending your software spend.”**