Rephrase Case Study – Ark Schools Appeals Process

The Governance team in Ark Schools coordinate the process of recording appeals lodged by parents when their child is not offered a place in one of their preferred Schools.

Naturally, this generates a mountain of paperwork which was hard to keep under control and required a great deal of manual data entry and administration to manage. This case study focuses on the way we were able to automate this process and free up a significant amount of time within the Governance team.

"We have not only saved a huge amount of time by reducing manual data entry, we also have a quicker insight into the number of appeals we are receiving and can quickly produce reports and comparative graphs on the data held by Salesforce."
Catrin Pinheiro-Torres, Information Analyst & Admissions Officer, Ark Schools

The manual process presented the following challenges:

- **Sending an acknowledgement to the Appellant** – every Appeal submission required an acknowledgment which was printed and posted.

- **Passing on the Appeal application and related attachments to the School Admissions administrator** – further administration requiring the creation of an Appeal document pack that was then emailed across to the relevant School Admissions contact.

- **Tracking Appeals' statuses within the process** – this process was managed using a spreadsheet and of course added an additional element in the administration process.

The Solution

Rephrase designed a solution that incorporated the following elements and led to a complete transformation in the way Appeals are recorded and processed:

Online Appeal form – we used the Form Assembly app to create an online form that is accessible from the School's website to capture Appeals and associated attachments and store them directly in Salesforce

Instant acknowledgment – using Salesforce workflow and email template capabilities, the Appellant is sent an acknowledgment as soon as they submit their Appeal

Automated document creation – Conga Composer recreates the Appeal submission in MS Word format

Automated email – using the add-on Conga Workflow functionality, the Appeal submission document and associated attachments are bundled together and automatically emailed to the relevant School Admissions administrator

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We were able to quickly deliver a solution that offered:

- **A simple yet bespoke solution** – on this occasion, it made sense to take the existing process and simply automate each of the steps using Salesforce, Form Assembly and Conga Composer

- **Online forms** – easy to use forms that store data directly into Salesforce whilst also ensuring the data being submitted is complete

- **Fast document creation** – we recreate the Appeals submission form, the acknowledgement letter and bundle them together with submitted attachments

Key benefits

We were able to facilitate a transformation in the way that the Appeals team record and coordinate the Appeals which has produced the following benefits:

- **Reduction in administration burden** – the need to manually email forms and subsequently compile the results into spreadsheets has been eliminated thereby saving the team significant amounts of time. Similarly, using the system to generate documents has further reduced manual effort.

- **Up to date tracking information** – the Appeals team are now able to view Appeal submissions across all stages of their process at a glance.

- **Process automation** – the capture and distribution of Appeals submissions has now been significantly automated which is freeing up time for the Appeals team to use in other more productive activities.

About Rephrase
Rephrase is a Salesforce consultancy that focuses on saving organisations time and money by streamlining and automating routine processes, centralising information in a common database and creating solutions tailored to the needs of each client.