

# Education Data Architecture (EDA) Migration From a Managed Package

## THE CHALLENGE

University of the Pacific (Pacific), a private university in California, had been using Salesforce for years with a managed package designed to support recruitment and admissions. The managed package had limited customizations options, the integrations with the ERP were difficult to manage, and the CRM had become a patchwork of workarounds put into place in order to address system limitations. Users lacked trust in the system and found the page layouts non-conducive to effectively working with students.

As such, Pacific decided to implement a brand new Salesforce org that utilized Education Data Architecture (EDA). This new org was to be used by the graduate school for its recruiting, admissions, and academic advising efforts. Their goal was to lay the foundation for one robust, flexible system that delivers a consistent and quality experience for both users and students.

## THE SOLUTION

In collaboration with Pacific's team of system administrators, Redpath created a plan for translating Pacific's objects and fields into EDA's data model. Process automation was given a refresh and modified for performance and scalability, while still maintaining core business processes. Key page layouts were updated to increase user efficiency. To facilitate this migration, Redpath utilized the following project milestones:

- Discovery sessions with end users from key departments
- User story creation & solution design
- Object and field mapping/translation from Pacific's old org to the EDA data model
- User Acceptance Testing (UAT), led by Pacific's admin team with guidance from Redpath
- Training, led by Pacific's admin team with guidance from Redpath

## THE RESULTS

Pacific now has a brand new Salesforce org that utilizes Salesforce Education Data Architecture (EDA).

- Pacific is no longer tied to an inflexible managed package, and the foundation is set for future roadmap items, like implementing Salesforce Advisor Link
- Pacific can leverage the vast, collaborative Power of Us Hub customer community
- Academic Advisors are using a new, visually attractive student contact page, which allows them to quickly take action and view pertinent student information
- Process automation can be more easily updated and scaled as the university's CRM use increases

## YOUR PATH TO SUCCESS

Redpath has proven success methodologies to help you as your university teams evaluate digital strategies to transform Recruiting, Admissions, Student Services, Advancement, Corporate Partnerships, Marketing and Engagement. Reach out to us and we can discuss your best path to success.

*"Our experience with Redpath was tremendous. We had little to no stress during this project and would work with them again for future projects."*

- Angela Melero  
CRM Manager