Segment data by contacts who have expressed an interest and their course is available

Add to automated nurturing workflow in marketing platform

Message < 3

Automated reminder email to complete registration

Have both parts of registration been completed?

No

Yes

Add to automated newsletter workflow in marketing platform

Start

Participant registers on SBC site

Participant details synced to CRM

Unique Learner ID assigned and used as UID for participant lifecycle

Used to tie all activity to the participant for all time. Email address may change

Have both parts of registration been completed?

No

Yes

Has email address registered before?

Yes

Add to existing record

Notify admin of duplicate applications (email & CRM)

No

Has a business school been selected?

No

Data feed to Blueberry (external lead follow up)

Blueberry call participant

Yes

Reporting on application metrics

Relevant Business School notified (email)

Participant data updated in CRM

Did participant answer?

Yes

Call < 5

No

Update status in CRM to “ghosted”

Company turnover
Company headcount
Company age

Participant eligibility is checked (website)

Is participant eligible?

No

Notify admin of ineligible applicant

Update status in CRM to “ineligible”

End

Yes

Export to Business School CRM (API/CSV)

Business School contacts participant within 48 hours

Did participant answer?

No

Call < 5

Update status in CRM to “ghosted”

Yes

Mark as eligible on website

Did participant answer?

No

Activity synced into CRM from Business School CRM or shared spreadsheet

CRM API endpoint available for Business Schools to connect to & ability to read from a Google sheet/excel file

Yes

Business school contacts participant to take payment

Participant marked as enrolled and paid in website

Participant enrollment status synced to CRM

Participant enrollment status synced to CRM

Add to automated welcome marketing workflow in marketing platform

Business School completes onboarding

Participant account created in VLE via API

New account created using the Learner ID as UID

Participant registered against correct course and cohort in VLE

Participant progresses through course

Course progress is recorded in VLE

Has participant completed 1 module?

No

Yes

Course completion progress is synced to CRM

Has participant reached 50% complete?

No

Yes

Course 50% completion progress is synced to CRM

Course completion progress is synced to CRM

Has participant reached 75% complete?

No

Yes

Course completion is synced to CRM

CRM scheduled report calculates # participants per school completing 1 module

CRM scheduled report calculates # participants per school reaching 50% completion

CRM scheduled report calculates # participants per school reaching completion

CSV auto-generated and sent to finance team to produce invoices (weekly)

Participant account created in Mentoring platform via API

New account created using the Learner ID as UID

Participant assigned to mentor in Mentoring platform

Participant assigned to mentor in Mentoring platform

Mentor information is synced to CRM via API

Does the Mentor exist in the CRM?

Yes

No

Create the mentor record in CRM

Update the mentor record in CRM

Associate the mentor to the mentee in the CRM via the API

Mentor records activity in mentor platform

Mentor session log synced to CRM via API

Has the mentor completed 10 sessions?

Yes

No

New account created using the Learner ID as UID

Participant enrolled in alumni platform via API

Participant receives welcome email from marketing platform

Participant completes preference centre

Preference selection synced to CRM

Has participant completed all preferences?

No

Message < 3

Automated reminder email to complete registration

Has participant completed all preferences?

No

Participant accesses alumni materials

Participant accesses alumni materials

Participant event attendance recorded in alumni platform

Participant event attendance synced to CRM via API

Has participant made any referrals?

Yes

Referral details logged in Alumni platform

Referral details synced to CRM via API