

## Rephrase Case Study – Ark Governance team



The Governance team in Ark Schools coordinate the appointment and ongoing management of Governors within their Academies.

Originally being managed in Excel spreadsheets, the process of recording and processing Governor applications, tracking Governor term end dates, updating Governor details and capturing regular LGB reports from Clerks was an admin headache. Making sense of this vast amount of information required a great deal of manual effort and any reports quickly became out of date. This case study focuses on the way we were able to streamline and automate the capture of data resulting in huge time savings and instant access to meaningful information within the Governance team.

***“Salesforce has become an integral part of the governance team’s working practices, transforming how we hold and analyse our data. As well as enabling our team who are based in four cities to work together effectively as the database is ‘in the cloud’, it has freed up our time for us to focus on additional projects by releasing us from administrative tasks.”***

***Anna Machin, Governance & Compliance Manager, Ark Schools***

The original manual processes were highly manual to operate and present a number of challenges:

- **Capturing Governor Applications** – Governors completed a Microsoft Word Application form and emailed this to the Governance team for processing. The information from the form was rekeyed into an Excel spreadsheet for onward tracking.
- **Governor Term End Dates** – there was no easy way to keep track of Governor end dates which meant that positions often became vacant effectively without any warning.
- **Visibility of LGB composition**– since all the Governor information was recorded in multiple Excel spreadsheets, it simply wasn’t possible to understand which LGB Positions were filled, vacant or ending soon. This meant that LGBs weren’t being operated effectively.

### 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 Governor Application form** – we used the Form Assembly app to create an online form that captures Governor Applications and stores them directly in the database
- **Automated actions** – using Salesforce workflow and email template capabilities, Term End Date notifications are automatically sent to Governance team members giving them plenty of time to ensure a new Governor is in place
- **Automated document creation** –meeting minutes from 32 LGBs are submitted by Clerks each term and Conga Composer then amalgamates this information into a MS Word document that is then used as the basis of an update report that is presented to the Board
- **Instant Insights** – Salesforce Reports now extract up to date key operational information on demand.

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### Key benefits

By moving the Ark School Governance team onto Salesforce and into the Cloud, we were able to achieve a transformation within the team that has led to the following significant 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 Governance team are now able to track Applications through their process and clearly see the status of any individual Application as well as having instant visibility of their Governor pool
- **Process automation** – notifications are generated when significant status changes take place to a Governor record as well as reminders about forthcoming term end dates.
- **Governor self-updates** – taking advantage of the ability for Form Assembly to extract information from the database and populate into an online form, Governors can be given the ability to submit updates directly into the system such as contact details, skills and interests
- **Governor feedback** – valuable feedback from Governors is captured through an online form directly into the database and then compiled into a report using Conga Composer

### 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.