



# Education company learns the value of Nintex DocGen™ for Salesforce

Participate saves weeks and thousands of dollars using Nintex DocGen for teacher recruitment.

**Organization**

Participate (fka, VIF International Education)

**Website**

[Participate.com](http://Participate.com)

**Industry**

Education

**Country**

United States

**Business situation**

As the largest teacher exchange sponsor in the U.S., Participate recruits educators from around the world. Completing the extensive amount of required paperwork during the recruitment and registration processes created headaches and endless delays.

**Solution**

In 2012, Participate implemented Salesforce and hired an experienced Salesforce administrator who chose Nintex DocGen to digitize and streamline manual processes required for international teacher relocations.

**Benefits**

Significantly reduced turnaround time for document signatures – from four weeks to one

Saved thousands of dollars by electronically sending documents instead of mailing them

Ability to provide school district leaders with 24/7 access to virtual resumes

# Digitizing recruitment processes

As the largest teacher exchange sponsor in the United States, Participate recruits high-quality educators from around the world, creating global education programs for schools and districts. While language and distance are obvious hurdles, the paperwork required to relocate international teachers to the U.S. is a huge one as well.

Initially, Participate used an in-house developer to custom-build a database and a virtual job fair system to manage the recruitment process. Participate team members manually pulled, cut and pasted data into multiple documents, including virtual resumes, visa applications and benefit enrollment forms. Worse yet, this homegrown system required that documents be mailed overseas for wet signatures from teacher candidates and then mailed back. The entire process could take months.

Over time, Participate outgrew its time-consuming and error-prone system's capabilities. In 2012, Participate transitioned from its legacy database to Salesforce, and hired Salesforce expert Matt Torcasso, a Salesforce implementation consultant.

Matt was very familiar with Nintex DocGen's document generation service and believed it was the obvious solution.

"When I joined Participate, there were so many things staff wanted to do with documents that they had never done before," said Matt, who's now Manager, Information Technology at Participate. "Based on my experience, I knew that Drawloop could handle the simplest to the most complex and would completely transform the teacher recruitment process."

# Generating documents with the click of a button

*“Nintex DocGen saves my team about 40 hours of manually merging and debugging candidate resumes every season.”*

— **Kyle Freedman**, Associate Director of Partnerships, Participate

Tracking its virtual job fair system became Participate’s top priority. To replace the system, Participate’s development team created a resume template and used Nintex DocGen to merge required information from Salesforce custom objects into the template.

Using a feature called Content Delivery, Participate sends multiple resumes and associated teacher videos to school district leaders, who are able to easily review profiles and research candidates.

“Nintex DocGen saves my team about 40 hours of manually merging and debugging candidate resumes every season,” said Kyle Freedman, Associate Director of Partnerships. “Now that we have a resume template, it’s as easy as pushing a button in Salesforce and it’s only a matter of minutes to send multiple candidate resumes to our school district clients.”

*“With Nintex DocGen, we have not only created an electronic document process but many documents are also pre-populated with data in Salesforce. Everyone benefits – our internal teams as well as our teacher candidates – from not having to physically touch and fill out documents. It’s a first-class experience.”*

— Matt Torcasso, Salesforce Implementation Consultant



## **Nintex DocGen empowers Participate’s internal customers to help themselves**

Participate is America’s largest sponsor of K1 visas – which allow international teachers to legally teach in the U.S. for three to five years. With an average cost of \$50 for each packet, mailing hundreds of visa packets each year used to be a significant expense. Today, Participate electronically sends visa packets, saving thousands of dollars.

Participate also uses Nintex DocGen – with Excel as middleware – to aggregate badging information at the individual school and school district levels. Document generation pushes the teacher badging data from Salesforce to Excel and then into tables that compile the total number of badge credits earned by individual

teachers, schools and an entire district. The data is converted into charts, which schools and district administrators can access.

Nintex DocGen has improved productivity and efficiency for Participate recruitment, sales, client school districts, and the IT and Salesforce administrative teams.

“As the Salesforce administrator for the entire company, it is sometimes challenging to respond as quickly as I’d like to every internal request,” Matt said. “Because Nintex DocGen has a user-friendly, point-and-click administrative interface, my internal customers can self-manage and make simple field and tag updates without ever having to come to me.”

### **About Nintex**

Nintex is the global standard for process management and automation. Today more than 8,000 public and private sector clients across 90 countries turn to the Nintex Platform to accelerate progress on their digital transformation journeys by quickly and easily managing, automating and optimizing business processes. Learn more by visiting [www.nintex.com](http://www.nintex.com) and experience how Nintex and its global partner network are shaping the future of Intelligent Process Automation (IPA).

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