

*“I felt comfortable with Salesforce.com because it is a tested and proven technology. **There are many choices out there but Salesforce.com with the help from Idealist Consulting is the only one that presented itself as an affordable, efficient option.**”*

*Victor Magnotti
Technology Manager
Oak Hill School*



Challenge

To configure a system that managed and tracked:

- Donations and pledges
- Grants and funders
- Volunteers and members
- Reports & charts
- Newsletter recipients
- Duties and tasks

Additional challenges:

- Simple to use
- Ability to grow with the budget of the organization
- Clean design for data migration
- Fast configuration

Solution

Idealist Consulting approached OHS with an established nonprofit configuration. This configuration provided the ability to purchase the configuration in “segments” allowing OHS to consider budget restraints, future funding and growth. Moreover, each segment was implemented quickly allowing OHS to begin utilization within days rather than weeks. In the interest of time and money OHS had chosen the basic configuration of and had forgone the additional segments.

Results

- Increased efficiency with donor tracking
- Speedy data migration process
- Up-to-date knowledge of available human resources
- Enhanced proficiency with volunteer management
- Quick user adoption
- Quick implementation

With the help of Idealist Consulting and salesforce.com, Oak Hill is able to modernize its systems quickly and easily.

Oak Hill School (OHS) is committed to working in partnership with families to inspire children with developmental challenges to become active and passionate learners through an environment that promotes curiosity, flexibility, initiative and closeness to others. Examples include non-verbal learning disability, autistic spectrum disorder, as well as sensory integration, regulatory and multi-system developmental disorders. While the range of disabilities among children at Oak Hill is broad, classroom groupings cluster children with similar academic levels and learning styles. Our education program includes groups of children with good verbal skills and strong academic potential as well as groups of children with emerging language and academic abilities. Children who have struggled in the traditional classroom environment have an opportunity at Oak Hill to develop academic and social skills, high esteem and become leaders among their peers.

In November of 2005, after evaluating several nonprofit CRM solutions, OHS selected salesforce.com as its CRM application.

“We selected salesforce.com initially because of cost. We then discovered that the functionality Salesforce offered was by far and away the best out there. We were a little concerned about user adoption and configuration but that concern was quickly alleviated after speaking with Idealist Consulting.”

Victor Magnotti
Technology Manager

Choosing Salesforce.com

“Initially price was the deciding issue...were Salesforce not offered for free to NPO’s I don’t think it would have drawn my attention. Once we spoke with Idealist Consulting it sealed the deal. They had prototypes available that gave us the opportunity to understand Salesforce.com functionality very quickly. Even better, this made it much easier to ‘sell’ the merits of Salesforce.com to the staff and board.” said Victor.

Idealist consulting presents basic formats of Salesforce.com configurations (Apps) in order to help “frame” Salesforce.com functionality to the client. OHS was offered a menu of options that focused on both nonprofit and educational environments. OHS focused on nonprofit aspects of Salesforce because they were looking for a configuration that was directed around donation, grant and event management.

Implementation of Salesforce.com

"With Salesforce.com it took less than a week to implement. This included a walkthrough and a 50 page training manual. The fast implementation was extremely helpful for two reasons. First, we had a fundraiser right around the corner so we did not have time to spend on development. Second, the quick implementation emphasized the simplicity of Salesforce.com and the ‘light footprint’ it would make on our organization. I believe the simplicity of Salesforce will make the acceptance of Salesforce a little easier for everyone at OHS.” said Victor.

With the Idealist Consulting the implementation process is dramatically faster than a typical Salesforce.com implementation. Idealist Consulting evaluated the needs of OHS and then suggested an App appropriate for their organizational needs. Adjustments to the configuration were made based on specific requests (primarily to field names) and a guidebook and walkthrough (presented over Web-ex) was produced shortly thereafter. This entire process was done over the span of less than two weeks. The result was an efficient configuration with quick user adoption. The adoption process provided by Idealist Consulting is ideal for the organization that wishes to spend more time training and working and less time in development.

Training

OHS was provided with a conclusive 50 page, full color guidebook designed for beginner users. After paging through the Idealist Consulting Guidebook it was decided by OHS staff that additional training was not required.