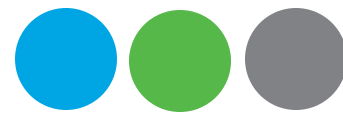


# Making Lives Better with Salesforce

Community Action Coalition for South Central Wisconsin, Inc. harnesses the power of Salesforce and the experience of Ledgeview Partners to fight poverty



Community Action Coalition for South Central Wisconsin, Inc. exists to develop economic and social capacities of individuals, families and communities to reduce poverty in Dane, Jefferson and Waukesha Counties. That's their mission, and it has been since their founding in 1966. Community Action Coalition for South Central Wisconsin, Inc. is one of approximately one thousand Community Action Agencies (CAAs) across the United States working to help people lead better lives. Over the last fifty years, they've created and operated a wide variety of programs that build on the strengths, assets and capacities of low-income people and communities to develop solutions to poverty.

That's their strength, but it was also their challenge.

Simply put, they do a lot of great things for a lot of people. And to pull it all off, they rely on many donors to help them fund their programs, and an army of volunteers to implement those programs. Lots of people means lots of data. Tracking donations, coordinating volunteers, not to mention onboarding participants and tracking their needs and the corresponding services available to them. Community Action Coalition for South Central Wisconsin, Inc. needed one central database to house all of that detail so they could help more people, and more effectively coordinate the funding and volunteers necessary to provide that help.

They had an old, antiquated CRM that provided painful reporting, and was nearly impossible to update. Only certain parts of the organization could really utilize the system, and because of that, data ended up spread out in a number of places. Staff maintained their own records in spreadsheets or paper files. The service to participants never suffered, but the amount of time involved in compiling any kind of reporting was excessive, and the ability of staff to collaborate on service was limited by the organization's decentralized data.

David Knickmeier, Operations Specialist - IT for Community Action Coalition for South Central Wisconsin, Inc. knew they needed to do something different. Then he ran into Ledgeview Partners at the CCB Tech Showcase in Milwaukee, WI. That's when things got interesting.



Community Action Coalition for South Central Wisconsin, Inc. decided that Salesforce was exactly what they needed. It simplified their IT infrastructure by taking their database into the cloud. It was intuitive to use, customizable, and the nonprofit version of Salesforce was very attractive from a cost perspective.

"We sat in Ledgeview's presentation at the conference, and that's when we knew which platform to choose and that we were going to work with Ledgeview. We liked the way they presented. It was clear and it really showed how knowledgeable they were. When they were finished, it was clear what we should do next."

David Knickmeier, Community Action Coalition for South Central Wisconsin, Inc. IT Operations Specialist

Knickmeier tapped Ledgeview Partners to handle the design and implementation of their new Salesforce implementation. Together, they quickly defined the main objectives for the project:

- Consolidate Community Action Coalition for South Central Wisconsin, Inc.'s data
- Donors, volunteers, participants, and inventories of program supplies
- Move the data into the cloud to simplify their internal IT infrastructure
- Clean up their data, eliminating duplicates and/or bad records
- Track the path of participants through their programs
- Visibility to the programs and services they participate in
- Build robust reports that enable Consolidate Community Action Coalition for South Central Wisconsin, Inc. to analyze their data



"The design process was really, really good. Ledgeview took the time to understand what we do and how we do it. That helped the design process A LOT."

David Knickmeier, Community Action Coalition for South Central Wisconsin, Inc. IT Operations Specialist



Community Action Coalition for South Central Wisconsin, Inc.'s new Salesforce implementation went live on October 1, 2016. Today, they have more than 40 active users on the system. Knickmeier elaborates, "There was a bit of a learning curve at first, but people are really starting to feel comfortable with it. They actually enjoy using it."

Not only do they enjoy using it, which is always great to hear, but they're more effective and efficient. Knickmeier shared how difficult it used to be to compile any kind of report. He detailed how they used to have to talk to about ten different people and pull data from multiple sources to create one of their critical reports. He estimated that if you added up all the time needed to create that report, it added up to about A MONTH'S TIME IN TOTAL. Today, that report can be run in about 5 minutes with the push of a button, and at any time. Put some dollars on the time spent, and the savings adds up fast.

But beyond cost savings, Community Action Coalition for South Central Wisconsin, Inc. can also provide better service to participants now that they have Salesforce in place. For example, caseworkers now have their own dashboards that allow them to see an overview of all of their open cases. They can quickly review them and see what needs to happen at a glance. That's a huge improvement over the old way of

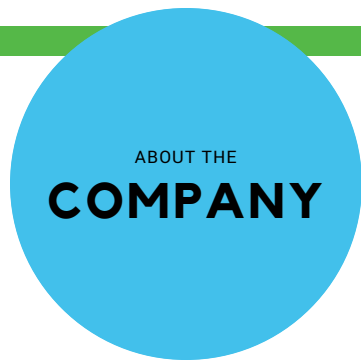
rummaging through spreadsheets and paper files to figure out the specifics of a particular case. Knickmeier explains, "The quality of service has actually gone up because the dashboards make it easier to track activity, and to transfer people to other caseworkers if they change location, for example."

Clearly Salesforce is already having a huge impact on Community Action Coalition for South Central Wisconsin, Inc.'s ability to achieve its mission. But there's more to come. Next up is integrating Microsoft Office 365 into Salesforce, specifically the Outlook and Salesforce calendars. In the near future, Knickmeier wants to expand Salesforce to allow volunteers access so they can register themselves directly on the system, saving staff even more time and, helping to reduce duplication and enforce data quality standards.



As they look towards the future with Salesforce, Community Action Coalition for South Central Wisconsin, Inc. plans to continue to utilize Ledgerview Partners to help them implement their plans. Knickmeier offers, "It was all around a really good experience working with them. Ledgerview is great, and they know what they're doing. They'll take the time to get to know your company and understand what you need. They were more prepared than we were!"

We're nothing if not prepared. And we're prepared to help your organization make the same kind of efficiency and effectiveness gains that Community Action Coalition for South Central Wisconsin, Inc. has experienced. Just give us a call, and let's talk.



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**Company Headquarters | Madison, WI**

Founded in 1966, Community Action Coalition for South Central Wisconsin, Inc. (CAC) has created and operated a wide variety of programs aligned with our mission. CAC actively engages all parts of our communities in the struggle to eliminate poverty. We build on the strengths, assets and capacities of low-income people and communities to develop solutions to poverty. Our five-year goals include helping people develop the capacity, knowledge and skills necessary to improve their economic and social circumstances and ensuring that people develop assets that enable them to strengthen their economic futures. We engage in a wide variety of activities to accomplish our goals, which you can read more about in the 'Divisions' section of this website.

Our mission is to develop economic and social capacities of individuals, families and communities to reduce poverty in Dane, Jefferson and Waukesha Counties.

**Looking for Results like the Community Action Coalition?**



CONTACT LEDGEVIEW TODAY:

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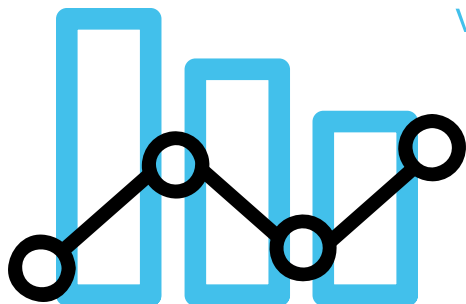
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Ledgerview Partners is a business and technology consulting company who partners with organizations to transform sales, marketing and customer service operations & processes that are supported by core technologies including Customer Relationship Management (CRM) and Marketing Automation.

Ledgerview Partners' consultants combine savvy business intellect with strong technological aptitude to provide solutions that extend well beyond software implementations. It's about building relationships, transforming business, and delivering phenomenal customer experiences.

Ledgerview Partners is a Microsoft Dynamics Gold Partner and a Salesforce Silver Consulting Partner.