



Non-Profit Deploys CRM in Three Weeks

"I was very impressed with the speed and professionalism of West Coast Consulting Group. They delivered exactly what we wanted, and they did it within our tight budget and time constraints."

— Sharon Jacobson Executive Director



ORGANIZATION

Genesys Works

INDUSTRY

Non-Profit

HEADQUARTERS

2800 Post Oak Blvd., Suite 6200
Houston, Texas

SUMMARY

- Implementation in 3 weeks
- Successful, complex data migration
- Cloud solution with no investment in hardware or software
- Exceeded customer expectations

Challenge

Genesys Works is a non-profit organization in Houston, Texas that enables inner-city high school students to break through barriers and discover through meaningful work experience, that they can succeed as professionals in the corporate world. Students join the program for 8 intensive weeks of training, to work at one of the company's clients during their senior year.

The company used a variety of Excel spreadsheets to manage their student data, as well as advisor, donor and client company information. This made it hard to implement repeatable business processes to streamline operations.

Sharon Jacobson, Executive Director, described how they needed to look for a solution: "We had to find a way to consolidate our information into one system that would allow us to standardize our processes and keep all our data in one place. I had used Salesforce.com in my past company and knew that it would be able to solve our problems. However, two previous consulting engagements had failed to produce a working implementation."

Solution

West Coast Consulting Group was tasked with creating the data architecture and migrating 10 years worth of data into Salesforce Foundation. This required significant data cleansing and consolidation of information from various different sources.

Relying on a Cloud-based CRM system meant that Genesys Works did not have to invest in computer hardware, software or IT infrastructure. All their customizations are automatically maintained and upgraded on Salesforce.com's servers.

Results

In just three weeks, West Coast Consulting Group implemented a Cloud CRM solution that met the needs of Genesys Works. West Coast consultants trained all users to maintain the data on an ongoing basis. Next steps will include integrating the Salesforce system into Outlook and creating detailed reports and dashboards to support management.