

New York State School Boards Association

Location:

Latham, NY

Fonteva Solution:

Membership

The New York State School Boards Association (NYSSBA) provides information, training and legislative advocacy for issues impacting school boards in the state of New York, and collaborates with other educational and related organizations to promote excellence in education for public school students.

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The Big Story

The New York State School Boards Association trusts Salesforce® and the Fonteva Platform to boost its team's efficiency and productivity with the powerful member experience, data management, and workflow automation of the world's #1 CRM.

The Challenge

The New York State School Boards Association's mission is to make sure school boards across the state of New York have the leadership, resources, and supportive legislation they need to deliver a truly world-class education to the students of the Empire State.

But when it came to managing the data of their 650 member school boards and the 7,000 individual board members they represent, NYSSBA knew they needed a smarter platform. With staff wasting valuable productive time pulling manual reports from a frustrating system - and user adoption lagging as a result - NYSSBA wanted to bring their association software, and their member experience, into the 21st century.

Looking for a robust CRM built with associations in mind, NYSSBA turned to Fonteva, and it's Salesforce-based association software platform.

The Solution

Fonteva worked side-by-side with NYSSBA to implement the ideal platform configuration that would deliver the unique reporting, data management, and high quality member experience they needed to support their mission and achieve their goals.

“We knew we needed a high adoption rate, and we wanted something that was absolutely best-of-breed,” says James Page, Director of Information Technology and Project Planning at NYSSBA. “But most AMS are too rinky-dink. They can't do the workflow management and process building functions of a true CRM. That's exactly why we chose Fonteva.”

The Solution continued

The Fonteva Platform is built completely native to Salesforce, so NYSSBA now enjoys the robust and detailed data analysis, reporting, and workflow automation power of the world's leading CRM. Further, because the Fonteva Platform is designed with the specific needs of membership associations in mind, features like membership renewals, event registrations, communication cadences, and tailored dashboards are simple and ready to use, right out of the box.

"Our adoption rate is through the roof. I mean, I hoped it would be high; I never dreamed it would be this high," Page says. "We have more staff running their own reports, more staff utilizing the system who need to. We've been able to restructure our workflows with Fonteva so we're using our resources better and automating manual tasks."

Onboarding and managing new members is simpler than ever, and membership numbers are growing as a result. A tedious, manual cadence of welcome emails, newsletter signups, and community logins for 600+ new members a year was sapping Page's staff of

productive hours. Now, it's all fully automated with Fonteva. "My team uses that time for research and special projects now. Things that will help NYSSBA execute our mission going forward, that will let us keep adding new value to our members," he says.

All that efficiency and better data management is already paying dividends. NYSSBA no longer needs to hire three (3) seasonal employees to handle new member onboarding at the start of the school year. And with the help of Geopoint, one of thousands of technology connectors available in the Salesforce AppExchange, NYSSBA is able to geographically optimize the business trips of their Member Relations Managers, so they visit as many clients as possible for the least expense.

"Fonteva makes our budget go so much further," Page says. "But my favorite benefit is how it's affected staff morale. They enjoy working in the platform. It has re-motivated them, and happier workers do better work."

That's association management at the top of its class. That's Fonteva.

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