Industry-leading case management for

RADICALLY BETTER IMPACT

- Save staff time with efficient case management tools
- Uncover insights and tell impactful stories with advanced reporting
- Invest in a sustainable future with a system that scales as you do

Tailored Intake

Customize for your programs

Household Tracking

See relationships and households for each client

360° Client Record

Monitor clients across programs

Flexible Service Tracking

Input any type of individual or multiple services

Automated Referral Follow-Up

Automatically record feedback from internal and external partners

Flexible Assessments

All staff to perform any number of assessments per program

Event- and Time-Based Alerts

Automate tasks for case managers

Service Teams

Connect all service providers to the client, partners, providers, and staff

At-a-Glance Dashboards

Visualize data in multiple types of charts or tables

Drag-and-Drop Reporting

Create reports on any data for staff, funders, and grantmakers

Outcomes Measurement

Connect indicators to assessment data to measure progress

Field-Level Security

Restrict access to information down to the field level

Smart Document Storage

Attach any type of file to client and case records

Configurability

Self-manage your growing system as program needs change

Integration

Integrate with Gmail, Outlook, APIs, and thousands of other apps

Expanding Features

Access new functionality with regular feature upgrades

exponent case management

Schedule a free consultation with us!
www.exponentcasemanagement.com

Intake and Assessment

- Differentiate your intake processes by program
- Record information for clients and households
- Collect demographic, household, contact, and related data
- Assign clients to specific funding streams
- Assign staff to clients
- Conduct program eligibility processes
- Create unlimited assessments

Automate Case Management

- Generate event- and time-based tasks, reminders, and notifications
- Send email alerts to staff when an incident has occurred
- Create approval processes for service plans and staff assignments
- Track communications on client and case records
- Set goals and milestones to ensure no client slips through the cracks

Comprehensive Service and Program Tracking

- Track services to individuals, families, or households
- Develop and manage individual service plans
- Set units of service based on the program and service type offered
- Create internal and external referrals and track referral status
- Maintain a universally-accessible list of external service providers for referrals
- Record any type of incident and its resolution
- Get a 360-degree view of client records across all programs
- Manage and record class enrollments and attendance

Outcomes Management

- Perform assessments throughout the client's lifecycle – at intake or scheduled
- Measure outcomes through assessment progress reports
- Eliminate duplicate data entry by copying identical assessments
- Track service plan attainment
- Report on individual programs, staff members, groups and more
- Access reports to evaluate staff performance
- View status bar on each client record for key information

Built on the Salesforce Platform.

salesforce

Our modern solution is built on the world's best CRM: Salesforce. Exponent Case Management allows you to run your entire agency on one system, from fundraising to volunteer management and beyond. Salesforce's massive investment in R&D innovation and more than 4,000 integrated applications means you have a solution for every need. Join the 40,000 other nonprofits who rely on Salesforce to power their missions.