

# One size does not fit all

How Integrev's Salesforce customization transformed Education Evolving's nonprofit data management

## SITUATION

The staff at Education Evolving believe that the one-size-fits-all school model was never designed to truly serve all students nor prepare them for a changing 21st-century world. That's why the organization's leadership focuses on making American public education more student-centered. This means honoring all young people for who they are as learners and unique individuals.

Being a systems change organization, Education Evolving must have access to correct, actionable data. However, the organization faced issues with data management due to its need to manage contacts, event registrations, and other critical information. It was difficult for the organization to keep track of relationships with donors, partners, and stakeholders. Generating accurate and timely reports for grant applications, board meetings, and other purposes was also challenging.

"We were using an outdated, homegrown customer relationship management (CRM) system to track all

of our contacts with donors and stakeholders," said Lars Esdal, executive director of Education Evolving. "Consequently, it was difficult to make adjustments to the configuration to make it fit our needs at any given time. We don't just solicit money. We also host events and distribute information. That means we need a more powerful and flexible CRM."

Lars and his colleagues searched for a platform that would solve the organization's issues. However, they were quickly frustrated by how the CRM landscape virtually ignored the needs of nonprofits. Eventually, Lars settled on transitioning to Salesforce's free nonprofit platform, but it wasn't a complete solution. Lars needed a vendor to customize Salesforce to his requirements, but he was skeptical of what any vendor could achieve for Education Evolving.

"Each proposal we received caused me to expect a cookie-cutter, off-the-shelf installation that didn't give us what we were looking for," said Lars, "and that's exactly how things went until we found Integrev."



"The Integrev team are **tech wizards** who are also willing to **deeply and truly understand** what your core needs are. They then take that understanding and deliver a **customized solution** that works."

**LARS ESDAL**, Executive Director of Education Evolving

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## SOLUTION

The Integrev team focuses exclusively on helping companies grow their business using best practices in scaling systems, processes, and teams by bridging the gap between strategy and technology. For Education Evolving, that meant customizing the organization's Salesforce installation to meet its unique outreach needs.

"It was clear from the start that the Integrev team understood what we required from Salesforce," said Lars. "They understood that the job of influencing people and moving ideas is a fundamentally different use case for a contact database and a CRM database. I was impressed by how well they knew how to use the technology to get us where we wanted to go instead of pushing us into a native Salesforce feature that would have required us to make sacrifices."

Integrev quickly developed the customized Salesforce solution for Education Evolving that fit the organization's precise needs. Lars appreciated the fast turnaround, and the nonprofit no longer had to rely on an outdated data system.

## A look at the results

### DATA CONSOLIDATION

Education Evolving's data is now unified in one location, simplifying access and management.

### IMPROVED RELATIONSHIP MANAGEMENT

Lars and his team can easily monitor interactions, event attendance, and other relevant information about the organization's contacts. This enables more personalized and effective engagement with stakeholders.

### ENHANCED REPORTING CAPABILITIES

Salesforce's data reporting features have streamlined the report generation process for various purposes, including grant applications, board meetings, and funding updates.

### EFFICIENT EVENT MANAGEMENT

The integration of Eventbrite with Salesforce has allowed the organization to manage and analyze event-related data more effectively, leading to better-targeted messaging and outreach efforts.