

Case Study: Breakthrough



Breakthrough partners with those affected by poverty to build connections, develop skills, and open doors of opportunity. Breakthrough is intentionally located in and works alongside residents in East Garfield Park. Each year, Breakthrough has the opportunity to work with over 6,000 local residents and their families.



Improved Staff Efficiency

Reduced weekly report prep time by 50%



Streamlined Intake Process

Reduced intake processing time by 20%, saving an average of 25 hours per week



Easier Access to More Data

Able to meet the detailed reporting demands of grants in less time

“We have a strategic goal of improving outcomes measurement and management. With our previous solution, we were tracking all the information we needed, but being able to get it out and compile it in a meaningful way was a huge challenge. It was painful knowing we were tracking all this data, but we were unable to let it tell the story.”

– John Smith, Chief Administrative Officer, Breakthrough

Data was siloed in two separate systems that weren't integrated

Breakthrough implemented the Salesforce Nonprofit Starter Pack in 2009 for donor management, and also used the solution for its CRM, marketing, and some volunteer needs. In 2011, the organization also implemented a point solution for case management, based on a promise that the product offered the ability to track efforts to measurable outcomes. Unfortunately, this promise never materialized as most of the implementation budget was spent on building out individual programs, and structuring records and assessments.

Case management point solution was closed, inflexible, and obsolete

"We pride ourselves on being a learning organization that tweaks and changes as we learn," explained John. "The solution we selected and built for case management was obsolete by the end of year one. It didn't give us the flexibility that we needed to adjust as we evolved."

Unable to understand an individual's involvement across the programs and services

In order to see multiple assessments for a single client, as well as the related case management notes, staff had to visit multiple program profiles for that individual. This cumbersome process made it time-consuming to gain a holistic view at the client level.

Manual and labor-intensive reporting

Limited report capabilities required staff to export data into Crystal Reports and try to manipulate it manually. According to John, "We were tracking all the information we needed, but being able to get it out and compile it in a meaningful way was a huge challenge."

Lack of alignment with business processes

"The model in our case management solution didn't align with the business processes of our different programs," said John. As a result, instead of supporting and streamlining Breakthrough's business processes, technology became a barrier. "Some of our programs just stopped using our case management solution altogether and instead tracked data on our various programs in a massive online spreadsheet."

Impossible to find an in-house expert for both solutions

Breakthrough needed an administrator who knew both systems well, so that the organization wouldn't have to rely on consultants to make changes or pull data. "We couldn't find that unicorn who had technical expertise in both Salesforce and our case management solution."

Solution

With an expansion planned, Breakthrough was motivated to make a change. "We knew that we were going to have to invest in some sort of system if we were going to improve how we were managing metrics," explained John. The organization sought a flexible platform with an open architecture that would enable cross-departmental collaboration, while supporting growth without relying on consultants. "We also wanted robust reporting and visualization tools, including dashboards."

Committed to finding a system that leveraged the "reliable and scalable" Salesforce platform, Exponent Case Management (ECM) was identified as the best option. "This combination of solutions ensures that we don't have siloed case records," said John. "It also enables us to have one person—a full-time admin—build the expertise in-house to manage the entire platform."

Breakthrough is now using the Salesforce platform and ECM for numerous departments: Fund Development, Volunteer Engagement, Adult Support Network, and Youth Network.

Results

Gained ability to easily build detailed reports and visually-pleasing dashboards

Staff productivity has increased thanks to the ability to produce reports more efficiently with ECM. “Now, I spend only 5 hours per week creating reports, instead of 10 hours,” explained Yolanda, Chief Program Officer at Breakthrough. The organization can now meet the diverse reporting needs of individual program managers or decisions makers with data on donors, volunteers, and programs. “We can build reports and dashboards that pull together data across programs at the client level to help us try to answer some of those deeper questions and draw bigger conclusions,” said John. Additionally, now that it is easier to pull data from a single system instead of two different ones, Breakthrough is better able to meet the detailed reporting requirements of funding partners.

Improved visibility into performance management

By centralizing data on the Salesforce platform with ECM, Breakthrough staff now have all case records and case assessments in one place. “We are able to monitor progress towards outcomes, in real-time, with flexible dashboards and reports that help us understand the impact of our services.” said John. Management can now see enrollments at a glance, so if they are below average at any given time, staff can make course corrections earlier or ask the right questions.

Enhanced data quality

Staff appreciate the improved data management, which makes it easier to identify when there are issues that need to be addressed. “Staff can now see, at a glance, how we are doing. They can quickly identify data quality issues, and immediately take action to resolve them, rather than waiting for quarterly reports to be assembled,” stated John. “They can also see the broader impact of what we are doing.”

Better user experience and improved security controls

Breakthrough’s staff now can see participant data in a more streamlined interface that requires fewer “clicks” to get at the information they need. On the security front, granular security controls allow for permission-based data access. According to John, “Having all data on one platform provides a holistic view of an individual or a family and their engagement with Breakthrough, while giving us the security controls to ensure that, on the backend, staff only see what they need to see.”

Prepared for future growth

Any need for additional functionality between Salesforce and ECM is met through different apps available on the AppExchange. According to John, “There’s generally a pretty affordable app that will meet our needs, easily extending the functionality of the platform. Salesforce offers incredible scalability—the sky is the limit!”

About Exponent Partners

Exponent Partners builds technology for social change so that nonprofits can understand their results and improve programs and services. Our solutions help organizations manage their outcomes on the Salesforce platform. As a B Corp and a California Benefit Corporation, we pursue our mission to make the social sector more effective through insights that drive impact. With deep expertise in Education, Human Services, and Philanthropy, we work with nonprofits who are driving change at the ground level and those who fund these organizations.

We have worked with over 500 large and small nonprofits organization on over 1500 projects in our more than 10-year history as a Preferred Partner of Salesforce.org. We are also the developers of Exponent Case Management, an app for human services agencies on the Salesforce AppExchange.

About Exponent Case Management

Exponent Case Management (ECM) is the future of case management. Offering industry-leading features and a world-class modern platform, ECM helps case workers collect data naturally while they work and makes it possible for human services organizations to connect their day-to-day activities to their outcomes. Built on the Salesforce platform, it supports all types of programs and allows you to capture your unique data and results. This state-of-the-art product provides all the core aspects of case management—including intake, assessment, referral, service tracking, service planning, reporting and more. ECM is expandable to a full organization solution to give your staff the ability to manage fundraising, volunteers, general contact information, and more—all in one system.