



NONPROFIT CUSTOMIZES SALESFORCE, VITAL DATA OPENS THE DOOR TO FUNDING OPPORTUNITIES

| BACKGROUND

Be A Leader Foundation (Be A Leader) is a nonprofit located in Phoenix, Arizona. Its mission is to empower students with the leadership, tools, support, and mentoring they need in order to succeed in higher education and beyond. Founded in 2002, this once completely volunteer-led organization has grown from serving 32 students a year to now employing 23 full time and 17 part time staff who collectively impact over 14,000 students a year.

| CHALLENGE

Be A Leader has been using Salesforce as a CRM since 2016 for its business development, donations, and contact management, but lacked the resources to hire consultants that could customize the platform to meet their program and operational needs. As a steppingstone until budgetary constraints opened up, they used a third-party managed package layered on Salesforce. For an annual licensing fee, this enabled them to create custom objects, page layouts, and fields to help support students in their postsecondary path.

Although it was an effective bridge to ramp up Be A Leader's use of Salesforce, it became apparent after a few years that the temporary solution had run its course. Be A Leader works closely with strategic partners nationwide, such as higher education institutions, foundations, and community organizations. In partnership with Arizona State University, Be A Leader recently received a grant

from the Bill & Melinda Gates Foundation. This dramatically scaled up their transition work in high schools, and it became apparent that they would require further customization within a tight timeframe.

| SOLUTION/RESULTS

With the new funding inflow, the foundation began the search for a consultant that could spearhead the transition from the managed package into a more sustainable solution. In 2020, Mastek, a leading CRM and marketing automation consulting provider with deep experience in the nonprofit arena, was chosen for the project.

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Soilo Felix
Chief Program Manager



| PRISTINE DATA OPENS THE DOOR TO FUNDING OPPORTUNITIES

Be A Leader, whose mission is to increase the number of students who enroll in post-secondary institutions, tracks enrollment records through the National Student Clearinghouse (NSC). The Salesforce customizations allow the nonprofit to analyze the efficiencies and effectiveness of its programming. From a business perspective, they can now frame their efforts and prove that their programs are successful.

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In Arizona, the student enrollment rate is 52% on average and Be A Leader's is a whopping 78%. Having access to pristine data helps make the case as to why its programs are essential and allows them to secure additional funding.

"This also helps us tie individual programs to the work we're doing. We can home in and see what is working from a delivery standpoint, or if a certain program isn't working, we can go back and retool that," said Soilo.

| SALESFORCE CUSTOMIZATION ENSURES DATA INTEGRITY, INCREASES EFFICIENCY

Prior to its engagement with Mastek, analyzing and uploading student information into Salesforce was time consuming. Data had to be scrubbed and manipulated, which made it prone to human and calculation errors.

"This was one of our biggest pain points. We didn't have an easy way to import data, and that information is a cornerstone to tracking our impact as an organization," said Karla Robles, Chief Strategy Officer. "It took a full-time person several weeks to accomplish this, and even after everything was in order, there were still inefficiencies and a lack of confidence in the integrity of our data."

According to Soilo Felix, Chief Program Officer, "After our engagement with Mastek, we were amazed that we could upload our records in just a few hours. This saves a significant amount of time, and we are now confident our data is accurate."

"If we had gone with a typical Salesforce consultant, we would have spun our wheels because they would have had to learn our business, our language, and the way we operate. Mastek already understood the connection between data systems and how that related to our business needs and program development."



Soilo Felix
Chief Program Manager

| REAL-TIME DATA PROVIDES VITAL INSIGHTS INTO CLUB ATTENDANCE

As part of its programming efforts, Be A Leader has student-led clubs in multiple schools across Maricopa County. One of their challenges was tracking club attendance. "In order to track the effectiveness of our programming and offer opportunities, such as scholarships, we needed to know how many students were actively engaged with us, how many times they came to a club meeting, and their contact information," explained Felix. "It's been an arduous process—from getting rosters out to the campuses and making sure they take attendance to returning the information to us so we can manually enter that data in Salesforce."

Be A Leader was using paper sign-in sheets, Google Sheets, and FormAssembly, but it was a clunky and difficult process to manage for thousands of students. Mastek solved this by building an external site for each club to login and access their roster. The club can check in each student in real-time from any device, the data goes directly into Salesforce, and they can have a dynamic view at what is happening.

"Instead of receiving stale data three or four weeks down the road, we can harvest fresh data in a timely manner and access that information through easy-to-use dashboards," said Felix. "The entire process during the high season used to take approximately 30 to 40% of a data analyst's time. Today, once the initial cohort is created, the information is available almost immediately."

| PARTNERSHIP PROVIDES LASTING VALUE

As the staff began to use the new platform, they realized additional customization and tweaks were required for the team to be more efficient. "We created a solution based on the assumptions we had in the beginning, but these evolved as our project progressed," said Robles. "Mastek pays attention to our needs, listens to our feedback, and continues to make adjustments based on actual user interaction with the solution."

Felix was impressed with Mastek's knowledge about the unique challenges that nonprofits face, noting, "If we had gone with a typical Salesforce consultant, we would have spun our wheels because they would have had to learn our business, our language, and the way we operate. Mastek already understood the connection between data systems and how that related to our business needs and program development."

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Karla Robles
Chief Strategy Officer



| CHALLENGES

- Temporary, third-party solution had run its course
- Required extensive customization within a tight timeframe
- Lack of confidence in data integrity due to manual processes, disparate systems
- Inefficiencies, no real-time data

| VALUE CREATED

- Dynamic data provides single source of truth for making data-driven decisions
- Automated processes increase efficiency
- Ability to analyze impact and effectiveness of programs
- Accurate data can help secure future unding opportunities

| SOLUTIONS

- Salesforce Customization



| ABOUT

Mastek is a turnkey & trusted Digital Engineering & Cloud Transformation partner that delivers Innovative Solutions and Business Outcomes for clients in Healthcare & Life Sciences, Retail, Manufacturing, Financial Services, Government/ Public Sector, etc. We enable customer success and business change programs by partnering with enterprises to unlock the power of data, modernize applications to the cloud, and accelerate digital advantage for all stakeholders. Customers Trust Mastek to deliver Business Value with Velocity and we operate in 40+ countries including the UK, Americas, Europe, Middle East, APAC with ~5000 employees. We are in the business of de-complexing Digital and making our clients future-ready with an industry-first approach. For more details, please visit our website www.mastek.com.

