

# CASE STUDY: SALESFORCE RE-OPTIMIZATION DELIVERS SUCCESS



KIDS IN A NEW GROOVE, AUSTIN, TEXAS—Kids in a New Groove provides Texas youth in the Austin, Dallas/Fort Worth, and Houston areas who are in foster care with free weekly private music instruction. Kids in a New Groove offers several different types of lessons based on the child's chosen area, such as voice, piano, percussion, guitar, clarinet, etc., at no cost to the child or foster family. Students also perform in annual recitals and have opportunities to make live recordings in professional recording studios.

The number of children aided by Kids in a New Groove (KING) has doubled in the last year, with over 70 children currently in the program. Since their inception in 2009, they have provided about 300 Texas youth with musical instruction. Children as young as 6 participate in the program and some have even gone on to graduate high school and attend college, all the while KING funded their lessons.

Kids in a New Groove has their eye on the future. They want to be able to expand their services to include all of Texas, and eventually nation-wide.

## THE BUSINESS CHALLENGE

Kids in a New Groove started using Salesforce in 2013. They initially used Salesforce to track students receiving lessons and the students' demographic information such as age, ethnicity, foster parent, number of lessons, lesson dates, teacher, and lesson feedback. The level of detail needed to track this type of data was not included within the Salesforce core components, so customization was essential to their success.

Using online blogs and the internal Salesforce 'Help and Training', Kids in a New Groove began to build out their Salesforce account to incorporate a number of custom objects to manage and track their mission's purpose.

The original structure of the database consisted of various custom objects like Students, Lessons, Lesson Logs, Rewards, Foster Parents, Teachers, CPS Supervisors, and Case Managers.

The blurred relationship between these custom objects was causing data entry inconsistencies, and therefore insufficient student and lesson reports. Reports such as number of high school graduate students, students by county, ethnicity percentages by location, instrument use, etc. were all manually calculated due to the fact that the database was not organized in a way to allow for the efficiencies Salesforce is known for.

Another business challenge Kids in a New Groove faced was user navigation throughout the database. The original structure required users to 'drill down' to multiple records to find or enter different pieces of data about any given student or lesson received.

Not only did this affect efficient navigation and user adoption of the system, it also discouraged staff from entering in full data sets about each student and lesson—the required information for accurate reports.

They needed to re-think the way their data was organized to help them improve user efficiency and database effectiveness.

Additionally, they needed to educate themselves on ways Salesforce could help them manage and grow their organization.



## THE ACCUFUND SOLUTION

Kids in a New Groove had internally discussed ways to optimize their Salesforce solution. They began researching Salesforce user courses but found most were too expensive, or were not flexible enough to accommodate their 7 day a week schedules.

Visiting AccuFund at a local nonprofit trade show, it became clear that they could utilize AccuFund's Consulting Services to assist with database re-organization and set a clear path to maximizing their Salesforce nonprofit solution. "We knew right away it was a great fit" explains Laura Wood, Program Coordinator.



AccuFund began the reorganization process with an audit of their current system structure and conducted a needs analysis. With the system audit, AccuFund created a visual representation of the custom

objects, the relationships among them, and proposed ways to redesign the database. The needs analysis was completed with staff members to help AccuFund better understand the current processes, data and reporting

needs, and how to begin accommodating for future growth.

With AccuFund's On-site Training, Consulting, Development, and Internal Data Migration services, AccuFund and Kids in a New Groove were able to work closely to optimize their database within 3 months.

Within that 3 month period, AccuFund worked to consolidate duplicated data fields, restructure the student tracking mechanisms, improve user navigation throughout the standard and custom objects, improve the use of business practices used in the Salesforce database and train the Kids in a New Groove staff on the best practices of Salesforce and on the unique structure of their database.

Additionally, AccuFund incorporated automated processes utilizing Salesforce's work flow rules to help staff manage their Rewards hierarchy. Students receive awards at key intervals based on the number of lessons they have completed within the program. The system now automatically assigns the task, or notification, to Laura to fulfill these awards; the task is also automatically logged into each student's record for historical purposes.

## DATA DRIVES GROWTH

Understanding their data and understanding how their data needed to be entered to produce the reports they need to continue moving Kids in a New Groove forward was key to their success. Laura Wood admits, "We needed to fix it now before we started growing."

They are now able to easily pull necessary demographic information to assist with grant writing and approaching new donors. "Now, I just press a button and the system figures it out," Laura Wood explains as she speaks to the reporting ease.

Now that the management and tracking of Students and Lessons has been improved and is less time consuming, they can focus more on donor tracking in Salesforce.

Kids in a New Groove has been able to start tracking

donations, donor involvement and donor interests. This information helps guide their Executive Director and Board of Directors as they prepare for upcoming events and seek sponsors.

Data drives new opportunities. As Kids in a New Groove continues to expand offerings to new communities, they now look to their data to show them what students are doing and how they are being successful. They are using this information to strategically grow their organization. Laura Wood explains, "We are now able to make smarter, informed decisions and look for communities we know we would be a good fit in."



## LEARN MORE ABOUT ACCUFUND

Visit our Website at [www.accufund.com](http://www.accufund.com), call your local reseller, or contact our Sales Department at 877-872-2228. We would be pleased to discuss this case study, explain the benefits of AccuFund for your fiscal department, and put you in touch with a local reseller certified to install and support the AccuFund Accounting Suite.

AccuFund CRM optimizes and customizes Salesforce into a donor database that meets the unique needs of an organization; improving development, management and fundraising activities.

For information about customizing your Salesforce solution, contact Sarah Finley at [sarahf@accufund.com](mailto:sarahf@accufund.com).