



CASE STUDY



CHALLENGE

NC Tech Paths is a nonprofit in North Carolina, USA, that aims to bridge the digital skills gap and create a diverse, highly skilled tech talent pipeline. NC Tech Paths faced a challenge in effectively capturing all of the information to their mission and had difficulty managing membership prospects and tiers. Their disorganized data led to missed opportunities for growth. However, through the use of Salesforce, NC Tech Paths was able to overcome these challenges. By establishing a membership structure and implementing custom fields, pipeline stages, automations, and reporting features, the team streamlined their processes and achieved greater control of their membership process.

"The Agile team provided me with a comprehensive understanding of Salesforce and actively listened to my concerns. They demonstrated an unwavering commitment to ensuring that I had the necessary support and guidance throughout the engagement."

-Kate Vermilyea, Project Manager

SOLUTION

NC Tech Paths worked with Agile Cloud Consulting to establish a membership structure to capture membership tiers and prospects, including active, lapsing, and lapsed members. The project plan included creating a membership opportunity process to manage their pipeline, developing seven membership tiers, and establishing nine pipeline stages. The team created custom fields, implemented on-screen guidance for system users, and implemented custom automations to streamline NC Tech Path's process. Reports were then developed using Salesforce's native reporting features, and a dashboard was created to provide a visual representation of the organization's membership data. Through these efforts, NC Tech Paths strengthened its Salesforce CRM and achieved its membership management goals.

ABOUT THE CLIENT

[NC Tech Paths](#) is an initiative in North Carolina, USA, that aims to bridge the digital skills gap and create a diverse, highly skilled tech talent pipeline. It is a collaboration between education providers, government entities, and businesses that are invested in the growth and development of the technology industry. The organization provides various programs, events, and resources to equip individuals with the skills and knowledge necessary to pursue a career in tech and support their continued professional development.

RESULTS

As a result of the successful completion of the Salesforce implementation project with Agile Cloud Consulting, the team has begun to reap the benefits of this powerful tool in their day-to-day operations. Although it has required an adjustment period for the team to fully embrace the new system and integrate it into their workflows, the team is eager to fully utilize the capabilities of Salesforce to better manage their membership process and bolster the organization's efforts to increase access to the technology sector in rural North Carolina.

ABOUT AGILE CLOUD CONSULTING

Agile Cloud Consulting provides end to end product development services. Our expertise extends beyond technology and into business process and strategic planning for the future. We specialize in for-profit, non-profit, higher education, and healthcare utilizing years of experience and hundreds of successful implementations to help you achieve your organizational goals.