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Salesforce.com and Force by Design Help JVS Improve Efficiency and Track Performance Outcomes

CASE STUDY

Jewish Vocational Services of San Francisco handles growing demand for job search assistance during economic turmoil, while client service requests increased by over 30%.



CHALLENGE

A growing workforce development agency during a period of economic turmoil struggles with outdated technology and client information located across multiple databases.

SOLUTION

Jewish Vocational Services chose Salesforce CRM to replace their outdated system and custom development with Force by Design.

RESULTS

The new JVS system gives employment specialists easy access to complete information about each client, to a “dashboard” that shows the agency outcomes, and to reports that tell them about their individual performance. Management has access to up-to-date performance outcomes and can give detailed reports to grantors.

The Challenge

JVS, a non-profit agency which serves all religious, ethnic, and age groups, helps a wide variety of clients find jobs. They help people with barriers to employment gain skills and they help employers fill their staffing needs with qualified JVS clients. For over twenty-five years they had collected client records in a variety of databases, and the records had outgrown the capacity of the Microsoft Access databases they used to capture clients’ information. Clients’ case notes were first written by hand on paper and later keyed into a separate database. Time and effort were wasted. Information about a single client could be found in a number of places, which made it difficult to view and understand the client’s history. Accessing a complete client’s record was difficult; tracking information about prospective clients and their referrals to agency’s services was not possible.

They also needed frequent and accurate reports for employment specialists, for management, for the board of directors, and for grantors. Statistics on the number of clients available for placement, salary trends, actual job placements, and year-by-year changes were just a few of the metrics tracked and reported on a regular basis. The data was also needed to help them improve their efficiency, as part of their performance outcomes tracking and monitoring.

The Solution

What JVS needed was a user-friendly system that would give a complete view of each client’s record, a way





“We’ve had tremendous growth in the last year, with thirty percent more clients than the year before last. Thanks to Force by Design and Salesforce.com, we can meet the heavy demand from job seekers in this economic environment.”

Dina Plotkin, IT director JVS

of identifying and tracking prospective clients, and the ability to track grant and contract performance, all feeding into a sophisticated yet easily accessible reporting system.



Dina Plotkin, IT Director, was determined to find a platform that could easily be customized to fit their business, was scalable to grow with their organization, and could give reporting and daily metrics for all staff members. They evaluated several platforms and ultimately chose Salesforce.com. Plotkin learned some good lessons along the way as they planned and implemented their new system. “We had very complex reporting requirements, and an unusually large amount of data that needed to be moved to the new system,” Plotkin said. After a false start with their first consultant, a colleague introduced Plotkin to the experienced professionals at Force by Design. “They took the time to understand our requirements, and brought in experts in areas such as data migration to help ensure that our records would be loaded accurately into the new system.”

JVS staff members refer to their Salesforce.com application as an “all-in-one/one-stop” application. With Force by Design help, they have been able to combine both client and employer data into one application, which helped them implement their dual-customer approach. Seeing information about employers, which clients they hired, and all information about clients from their demographics to outcomes, and then how clients and employers interact with each other, allows JVS to analyze and report on their dual-customer efforts and successes. This is possible only because of the integrated Salesforce.com design.

Additionally, they have eliminated the need for separate software to capture class attendance, test results, and satisfaction surveys. Other agencies implement several applications to capture such data.

“We have spent hundreds of hours working on usability. We are proud of the layouts of our screens and how they ease workflow.”

Human Services agencies must keep up with client follow-up and documentation. JVS’ application has been designed to track critical tasks and to remind staff about them. So far, they have noticed an approximately twenty-five percent increase in documentation of services and improved client follow-up.

JVS is an outcomes-driven agency. Their performance outcome management initiatives focus on tracking participants’ progress toward



self-sufficiency, better assessment of skills and work readiness, increased employer engagement and tracking, and developing new strategies for career advancement and for longer-term tracking and follow-up. Force by Design helped them create reports and dashboards that allow JVS staff to get up-to-the-minute progress and outcomes reports. The dashboards and quality assurance reports are scheduled to be emailed to staff monthly.

Because JVS' data collection and reporting is so robust, a number of government agencies have allowed JVS to provide them with Salesforce.com reports instead of using their applications directly, or using their reporting forms. "If we were not able to submit our monthly Salesforce.com reports to the Department of Children Youth & Their Families, we would have to hire at least one full-time staff to enter data into the Department's database!"



About JVS

JVS was founded in 1973 to help Jewish college graduates find work. In the 1980s and 1990s, JVS expanded to meet the needs of both the huge influx of refugees from the former Soviet Union, and the workers who had been displaced during turbulent economic times. Over the years, the agency has become a respected leader in the workforce-development community and is recognized locally and nationally for work in sector-based employment and training. Today, their services are open to all, and they have particular strengths in working with youth and adults with disabilities, the transgender community, older workers, and the Jewish community.

Contact Us

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About Force by Design

Founded in 2008, Force by Design, Inc. helps organizations of all size use the power of cloud-computing to run their mission-critical business applications on the salesforce.com platform. Force by Design's consultants have completed more than 1,000 client engagements spanning 10 years. We implement and optimize cloud-based applications, helping organizations put their applications in the cloud and have our own cloud-based apps. Force by Design's headquarters are in San Francisco, California with offices in San Luis Obispo, California. For more information, visit www.forcebydesign.com.

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