




2026 LITERACY TEXAS CONFERENCE

Strengthening Systems

Transforming Program Data and Workflows

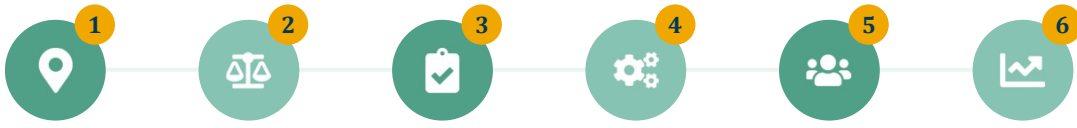
A partnership story: Literacy Achieves & CommonTeri Services (LitNim)
Presented by Jennifer Knoeber, CommonTeri Services and Pam Fields, Literacy Achieves



1

WHERE WE'RE HEADED

The journey — and what you can borrow



Any program whose data system has outgrown its needs faces these questions




1

2

THE STARTING POINT

Meet Literacy Achieves

Free English classes for adults and their young children — infants to preschool. A Social Services worker connects families to resources beyond the classroom

-  **Programs** — English, Civics, Citizenship, Advanced
-  **Campuses** — Vickery Meadow, East Lovers, Online, +WR
-  **Whole-family support** — Social Services connections
-  **2025 Library of Congress** — Literacy Award recipient



2025

Library of Congress
Literacy Award recipient

Nationally recognized — and ready to grow

4

3

WHY THIS MATTERS

The quiet cost of a system that no longer fits



Staff workarounds

Double entry becomes
“just how we do it”



Reporting gaps

Numbers grants and
boards want are hard to
pull



Blind decisions

Leaders plan on
incomplete information

Show of hands: when did your data system last make you want to put a stick of dynamite in your USB port?



3

4

2

THE STARTING POINT

Seven years in, on a system that had aged



7 years

Salesforce as system of record



7 years

Roll Call for program management



6 program staff

relying on the data every day

Familiar, long-serving tools — but the programs had outgrown them



5

5

THE STARTING POINT

Why now: the daily process was the problem

It was a process — creating classes, adding students, teachers and volunteers, taking attendance.

Way too complicated

— Pam Fields, Data Manager

Where the friction lived



Creating classes — multi-step every term



Enrolling students — slow, click-heavy entry



Adding teachers & volunteers — people across records



Taking attendance — daily friction point



6

6

3

WEIGHING THE OPTIONS

They started with questions, not products



What data do our programs use



What's required for reporting, grants, compliance



Where do staff hit friction or duplicate work

Who was in the room



Data operations



Program staff



Leadership

Everyone who enters and uses the data

7

7

WEIGHING THE OPTIONS

The honest trade-off — what tipped the scale



Change is a hassle — and necessary

The same reality was both the biggest con and the biggest pro.

What tipped the scale

- Easier for staff to enter data correctly
- Simple to train on new processes



What is LitNim?

Built natively on Salesforce
its own objects and automationProgram & outcomes management
built around what you report onPublic intake forms
live on Salesforce Experience sites

8

8

4

PREPARING FOR THE CHANGE

Self-implementation — with a lifeline



They kept ownership

- Literacy Achieves staff spearheaded the work
- CTS Office Hours gave targeted guidance — to validate, not outsource
- They came with specific questions on data structure and trade-offs



One honest caveat

"I wouldn't suggest this for anyone with just passing knowledge."

It fit because the team developed expertise and persisted in the implementation



9

9

PREPARING FOR THE CHANGE

People first — then the data



Prepare the people

- Learned how teams actually use their data
- Defined what data is truly meaningful
- Cut unnecessary and duplicate data
- Trained and documented before launch



Biggest time sink: data cleanup

- Reviewed legacy data
- Resolved inconsistencies and duplicates
- Mapped old data to new structures

Upfront work built trust and protected reporting.



10

10

5

IMPLEMENTATION

How the rollout actually went

**PHASE 1**
Explore

- Identified barriers: data, comms, tech
- Interviewed all Salesforce users
- Weighed options — CRMs, Google, MS 365, LitNim

**PHASE 2**
Evaluate

- Partnered with CommonTeri
- Compared apps (Roll Call, Form Assembly)
- Tested every concern with dummy data

**PHASE 3**
Build & launch

- Shared decision with board, ED, staff
- Customize the app and built flows in Office Hours
- Trained the team — guides & videos
- Prepped and ready for fall



11

11

IMPLEMENTATION

What was harder — and what surprised them

**More work than expected**

The build took real effort

**Clean data non-negotiable**

Insist on it, whatever the system

**Technology barriers**

Expect hurdles; set expectations

**The happy surprise:** how receptive the staff turned out to be

12

12

6

BRINGING STAFF ALONG

Change management that actually stuck



Trained, then re-trained — Initial training plus refreshers



Built on habits they had — Email and Teams to flag issues carried over



Invited the fixes — Fixed what they could; logged the rest



Resistance, expected

"It's okay to ask questions and ask for help."

Reinforced constantly



13

13

BRINGING STAFF ALONG

Buy-in follows visible relief

Staff came around when the work simply got easier



Enrolling students



Taking attendance



**Getting data into
Salesforce**



Now ready to grow: expanding is far easier on LitNim



14

14

7

ONE YEAR LATER

One school year in: what changed



01

Stronger operations

Everyone trained; a clear process for problems and help



02

Better data capture

Linked forms make reporting smoother



03

Streamlined workflows

Staff feel more confident and equipped

To confirm with Literacy Achieves: specific numbers per outcome



15

15

The review



1

Starting point



2

Weighing options



3

Preparing



4

Implementing



5

Change Management



6

One year later

All of these steps are necessary to a successful transition of data systems!



2

16

8

TAKEAWAYS

Five questions to ask before changing any system

-  What decisions do these data need to support?
-  What information are we collecting simply because we've always collected it?
-  Where do staff lose the most time?
-  What would success look like one year after implementation?
-  Are we choosing software—or solving a process problem?



17

17



Let's talk

Questions and your own tracking challenges

Thank you

Jennifer Knoeber · Jennifer@commonteri.com



Scan the QR code to
receive a copy of the
presentation!



9

18