

COMMONTERI

Empowering Nonprofits Using Salesforce

LITERACYACHIEVES

FOUNDED BY AL VICKERY MEADOW LEARNING CENTER

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

SESSION DETAILS



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WHERE WE'RE HEADED

The journey — and what you can borrow

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Starting point

2



Weighing options

3



Preparing

4



Implementing

5



Change Management

6



One year later

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

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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

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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?

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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

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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

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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

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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 automation

Program & outcomes management
built around what you report on

Public intake forms
live on Salesforce Experience sites

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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

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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.

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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

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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

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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

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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

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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

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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?

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Let's talk

Questions and your own tracking challenges

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

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