Engaging Schools Reforms Contract Management with Intuit QuickBase

The Challenge
- Cumbersome management of complex contracts via spreadsheets and email
- No visibility into contract status or communication activities
- Custom-built Microsoft Access database too complex for users and too expensive to update
- Staff spending too much time managing paperwork instead of developing client relationships

The Solution
- Contract management database application built with Intuit QuickBase
- Single source of insight for all professional development contracts
- Workflow tracking to make new contract opportunities easier to identify
- Centralized storage eased access to marketing, demographic and other materials
- Consultant assignments and communication activities logged for each contract

The Results
- 25-30 hours per week increase in staff productivity
- Saved time and money associated with custom-built reports in Microsoft Access
- Streamlined reporting of revenues and opportunities
- Increased program development time instead of building and rebuilding spreadsheets

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Geoffrey Bertram
IT Manager
Engaging Schools

Engaging Schools is a nonprofit that works with 3,600 educators and administrators yearly to create safe, caring environments where students can learn. It’s a business built on long-term relationships that take time to establish and maintain. To keep those relationships on track, Engaging Schools implemented Intuit QuickBase to automate and simplify its contract management tasks. Engaging Schools staff can now spend more time cultivating relationships with clients and improving educational programs.
As a nonprofit leader in school reform, Engaging Schools contracts with schools nationwide to provide professional development workshops and educational resources to educators of all types. The organization learned quickly that managing hundreds of school contracts with spreadsheets and email was too inefficient to make the grade. Staffers spent too much time updating spreadsheets instead of nurturing client relationships, and the organization had no system for tracking workflow and communication activities throughout their contract processes.

Engaging Schools had a Microsoft Access database for managing contract information, but users felt the system was too complex and quickly abandoned it. Even basic functionality like generating reports required technical assistance.

“There was no user-friendliness to Access. The way it was built, every report had to be created by a consultant, which was very expensive. It simply didn’t make sense for us to continue using it,” says Geoffrey Bertram, IT manager and finance associate at Engaging Schools.

**Easy reporting advances workflows – and revenue**

Bertram sought out a contract management solution that would be easy for his staff to use, yet powerful enough to perform robust management and reporting functions. He selected Intuit QuickBase based largely on the user-friendly interface.

Bertram built a custom application for contract management on QuickBase where everything could be managed, updated and shared from one central location accessible via the web. This made it easier to reconcile workflows against resources, time and revenue.

But the real game changer was the ability to generate custom reports quickly and easily. QuickBase’s built-in reporting and analytics capabilities made it possible for staffers to generate customized reports on demand, giving them visibility into opportunities and revenue they didn’t have before.

“With QuickBase, we could see how much revenue was coming in the door — how many contracts were on the horizon and when they would be coming in. With spreadsheets, that information could only be tracked on a very incremental basis,” says Bertram.

**Staff scores high with productivity and efficiency gains**

With contract management tasks automated and simplified within QuickBase, Bertram estimates that Engaging Schools has reclaimed 25-30 hours of valuable staff time per week that can now be better used on their mission to help schools.

Staffers can now access real-time information within QuickBase and generate reports on demand, without the cost or time delays associated with relying on outside IT resources. And, finally, Engaging Schools has the information they need, at their fingertips, to maximize their school relationships as they are converted from leads into signed contracts.

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