



"Our Plative team, Brian, Sam, Damian, and Fabian, were not only collaborators for our move from two separate CRMs to our current NPSP Salesforce org, but they were also supportive and empathetic to the challenges we encountered in the process. The year 2020 changed our organization's needs and subsequent goals. Plative helped us through those changes."



Amber McClarin
Enrollment Manager



The Institute for Educational Advancement (IEA) is dedicated to the intellectual, creative, and personal growth of our nation's gifted and advanced youth. Central to the mission of IEA is a commitment to the development of the whole child through engaging educational experiences that promote optimal challenge, mentorship, exploration of ideas and recognition of personal potential. IEA seeks to connect like-minded individuals and supports a diverse community that creates a sense of belonging and affirmation.



Plative is a Salesforce Implementation partner as well as an Oracle NetSuite Alliance Partner. As a global consultancy, Plative builds long-lasting partnerships with some of the world's most recognizable organizations to support and augment their missions.

Business Case

IEA offers several programs to students. Everything from Scholarships (Caroline D. Bradley Scholarship) to Camps (Yunasa) to Courses (Explore, Labs). Students need to be able to apply for scholarships and programs, as well as follow up on the status of their application or fees. IEA needed a tool to improve communications and a way for parents who enrolled their students in programs to pay invoices in a streamlined way.

Solution

IEA and Plative built and configured a Salesforce org, leveraging **Nonprofit Success Pack**. A **Salesforce Community portal** was configured to allow parents and students to submit applications, enroll in courses, and monitor the status of their applications. **Salesforce Pardot** was implemented to improve marketing communications and **iATS** was configured to allow for invoices to be paid and for donations to be made. During phase two, **FormAssembly** was integrated with Salesforce and leveraged as their application tool.

Outcomes

Plative was able to build a platform that allowed IEA to manage its constituents across multiple tools. Using FormAssembly, IEA was able to collect important data for students to apply to different programs. Salesforce allowed for IEA to manage contacts and their applications, as well as communicate with them through Pardot. The community portal allowed external users to manage and monitor their households and iATS allowed for families to pay for program enrollment and donors to make pledge payments. IEA was able to collect hundreds of applications for the Caroline D. Bradley Scholarship, to provide gifted students academic scholarships.