90%+ Drop In NewSchools' Grant Applicants Technical Inquiries

Industry: Nonprofit

Customer Since: 2023

Products: Experience Studio

Features: Forms, Portals, Automation

COMPANY BACKGROUND

For over 25 years, NewSchools Venture Fund has led innovation in K-12 education across the United States. The 501(c)(3) nonprofit acts as an intermediary funder, investing in new schools, tools, opportunities for students, and talent development.

NewSchools had an open grantmaking model but wanted to move toward a more integrated funding opportunity to lower barriers for early-stage innovators.

NEWSCHOOLS' CHALLENGE

NewSchools used a separate form tool to support its grant application process, but as its model evolved, the team needed flexibility. Applications required save-and-return, prefilled Salesforce data, conditional sections, complex branching, and Experience Cloud support, while keeping in-progress work inside Salesforce. The team also needed to create related records during the application process. Annual audits meant supporting documents and data had to stay compliant, organized, and easy to retrieve.

TITAN'S SOLUTION

With Titan Experience Studio, NewSchools brought its grant application process inside Salesforce. Applicants follow different paths by user selection, see only relevant sections, prefill data from Salesforce, and save progress with a return-later option. Built on Experience Cloud, the grant application portal uses branching logic, creates related records, and keeps supporting documents linked throughout the process for audit compliance.

Titan also lets NewSchools reassign in-progress applications without recreating Salesforce data and use an intake form with encrypted links in Salesforce records and email templates for secure file submission and information confirmation.



KEY RESULTS

- **Fewer Than 10% Technical Inquiries:** In the first year, technical inquiries about registering for and using NewSchools' no-code grant portal fell to under 10%, with fewer applicants requiring support to access the grantmaking software.

- **Zero Rework for Reassigned Applications:** NewSchools can reassign in-progress applications without recreating Salesforce data or asking applicants to start again.

- **Six-Month Launch:** NewSchools went from selecting Titan to launching its new grant application process in six months.

- **Annual Application Growth:** NewSchools has seen application volumes increase each year, indicating that applicants continue to successfully complete the process.

- **Adaptable Forms:** Titan's Salesforce form builder lets NewSchools add or remove sections without rebuilding the entire application.

- **Real-Time Application Tracking in Salesforce:** Application data and files save inside Salesforce, giving NewSchools visibility into applicant progress and where support is needed without relying on an intermediary system.

> *"Titan has always had the most granular control over the look and feel of forms. It also plays better within the Experience Cloud setting compared to some of the other tools that we looked at." - Matthew Porter, Solution Architect at Agile Cloud Consulting for NewSchools.*