MAGELLI OFFICE OF EXPERIENTIAL LEARNING

Scaling client outreach

From manual prospecting to an AI-assisted pipeline

Ashleyn Castelino · Gies Applied AI · October 4, 2026

01

The problem

Demand grows every year. Outreach doesn’t.

THE PROBLEM

Magelli already works — at scale

200+

client projects a year

300K

student impact hours

4.8/5



client satisfaction

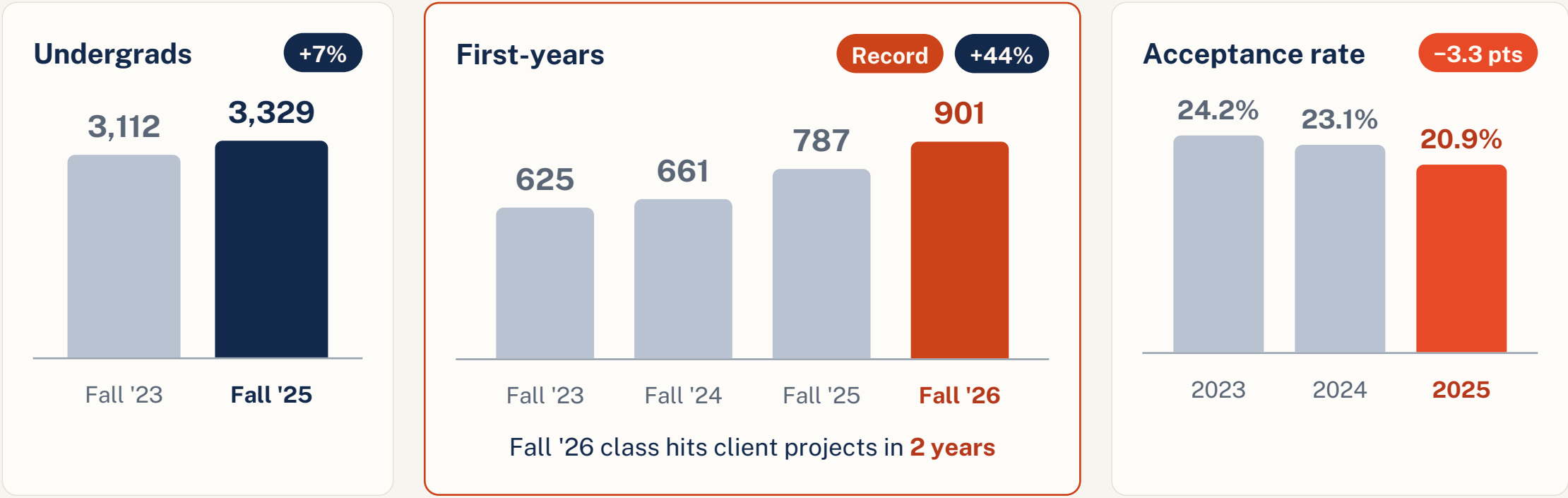


of clients would come back

Sources: Gies Experiential Learning page; Gies News, May 2019; Poets&Quants, Mar 2020 (n = 125 clients)

THE PROBLEM

More students, more clients needed



100% of Gies undergrads do a client project — every new student needs one

Sources: UIUC 10th-day first-year reports (Fall 2024, 2026); Gies enrollment snapshots (Fall 2023, 2025); Poets&Quants; Chicagoland Chamber. % calculated.

THE PROBLEM

How a client comes in today

MANUAL · THE BOTTLENECK

Returning client
Re-contacted by hand

or

Social outreach
One message at a time

STRUCTURED · ALREADY WORKS

Fills form
Project proposal

Salesforce
Logged

Call
Scoping call

Approve
Client approved

NDA
Signed

Onboarded
Project starts

Everything hinges on step one: **getting the form filled.**

THE PROBLEM

Where staff time goes

Repetitive

Same pitch, rewritten per company

Dropped

Follow-ups slip in busy weeks

Scattered

Context split across DMs, inbox, Salesforce

100s of hours spent by the team end to end every winter — **and more every summer**

Students scale every year. Outreach doesn't.

Finding clients is still done by hand, one message at a time.

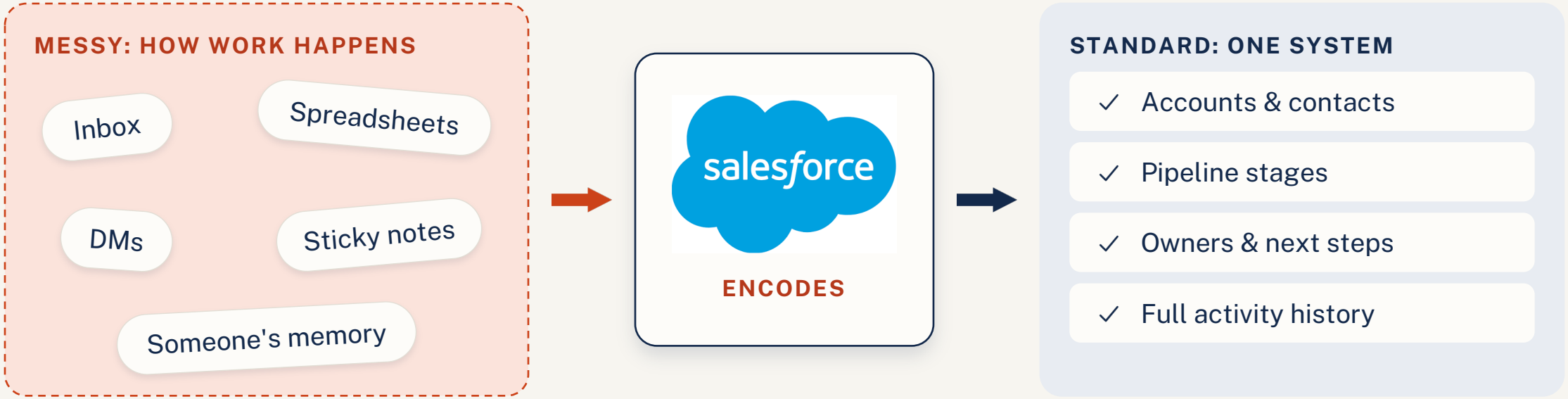
02

The experiment

We built Magelli Force. Here’s what it taught us.

THE EXPERIMENT

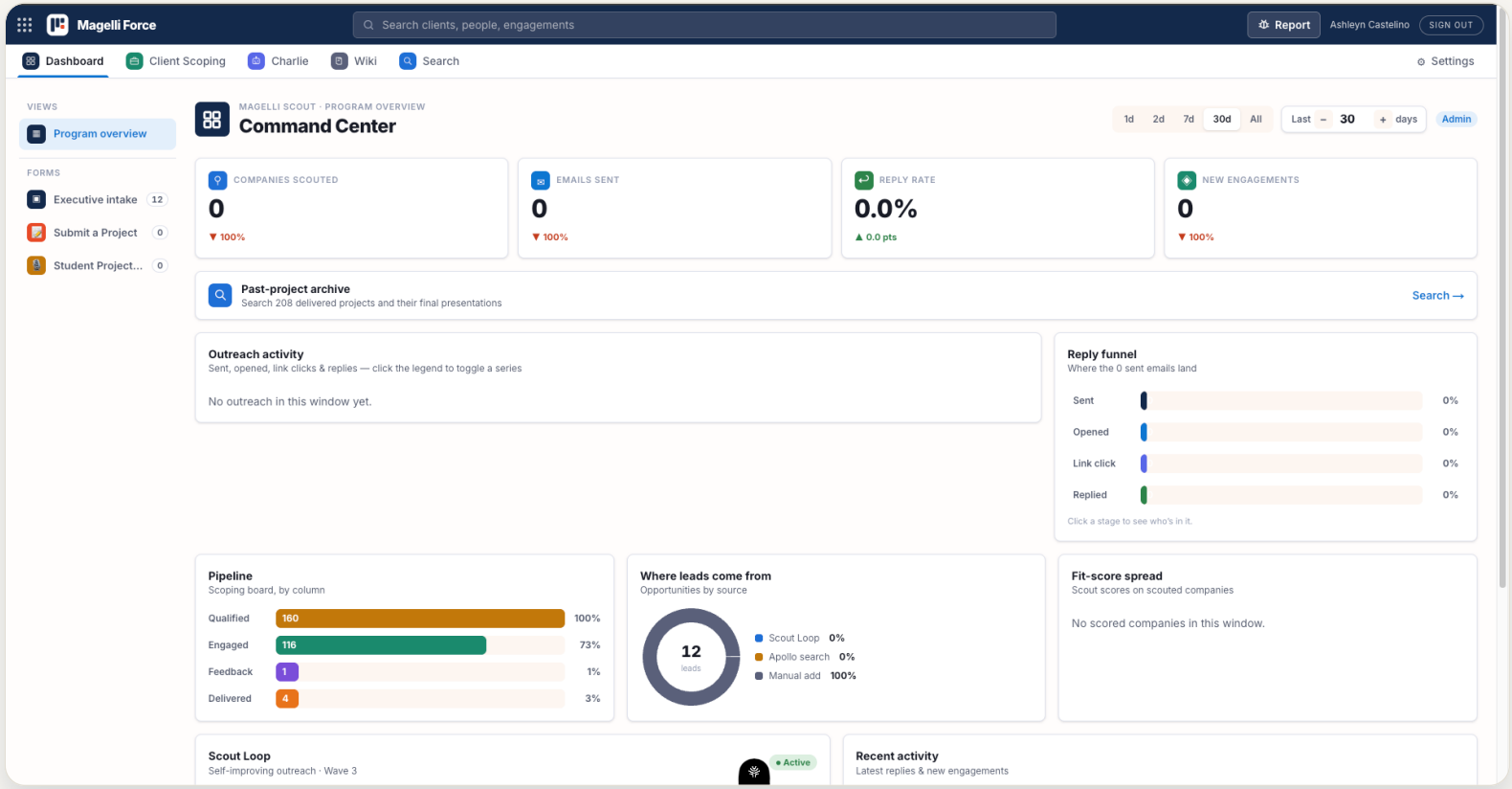
Salesforce isn't automation



It standardizes messy work into a system. **It doesn't invent the work.**

THE EXPERIMENT

What we built: Magelli Force



Salesforce substitute

Scoping, wiki, search

Outreach automation

Scout Loop, emails, reply funnel

Client records

Pipeline and project archive

THE EXPERIMENT

We automated the software, not the workflow

Software

Magelli Force, our Salesforce substitute
Where work is **recorded**

≠

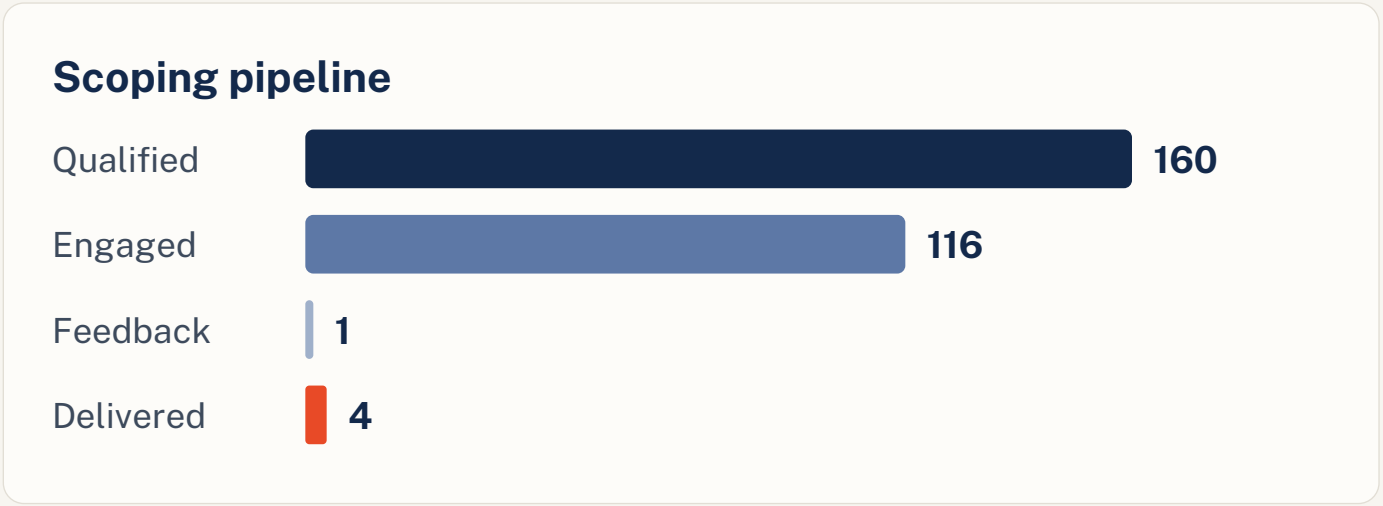
Workflow

Who, when, what to say
How work actually **gets done**

WHAT WE DID	Built the tool	→ Automated its features	→ Workflow didn't follow
WHAT WE'LL DO	Learn the workflow — first weeks	→ Build up from it	→ Plug into software

THE EXPERIMENT

What it left us: all our data, one platform



208

past projects archived

12

executive intakes

⚠ Outreach, last 30 days: **0 emails · 0 scouted**

Years of work, unified: **the source for every future layer**

Source: Magelli Force Command Center, 30-day view, screenshot Oct 3, 2026. Bars to scale from zero.

03

The solution

Enhance the workflow we already have.

Problem — Experiment — **Solution**

THE SOLUTION

Start with the clients we have. Automate outward.

Build on the workflow that already works — not something new.

THE SOLUTION

Start at the ground level, then expand

01

Map

Today's returning-client workflow

02

Automate

Re-contact, follow-ups, Salesforce — staff approve

03

Expand

Client referrals, new prospects, social outreach

FOUNDATION **Magelli Force database** — client and outreach data we already have

Maximize who we know. **Grow from there.**

THE SOLUTION

Same workflow, enhanced — not replaced

2 enhanced | 1 automated | 2 human in the loop | 1 student-led | 2 unchanged

Step today	Change	How
Re-contact clients	Enhanced	Drafts from Magelli Force data — staff approve
Social outreach	Enhanced	Prospect lists and drafts — staff approve
Fills form	Unchanged	Same proposal form
Salesforce	Automated	Every touchpoint logged automatically
Call	Unchanged	Staff-led
Approve client	Human in the loop	Staff make the final call
NDA	Human in the loop	Staff review and sign off
Onboarded	Student-led	Student teams take over onboarding

THE SOLUTION

How we'd build it: two paths

OPTION A

A layer on existing software

Outreach layer

Salesforce · Airtable

No new system to learn

or

OPTION B

Magelli Force, refocused

Outreach only

Magelli Force data

Built for this one use case

Either way: **workflow first, software second.**

THE SOLUTION

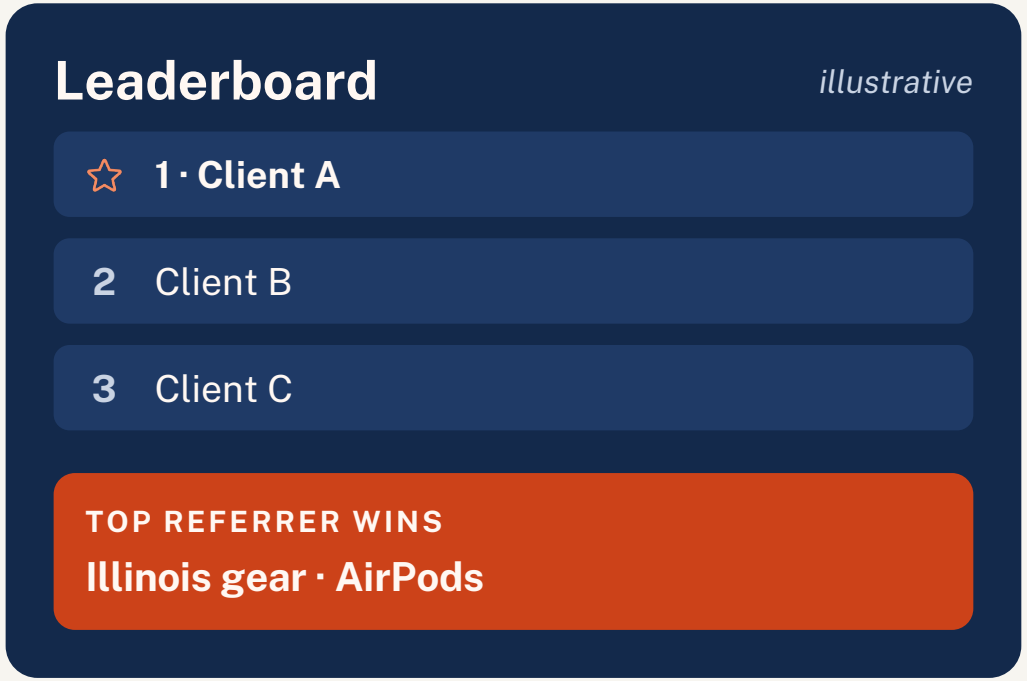
Turn happy clients into referrals

01 **Client shares** a referral form

02 **Prospect** fills it in

03 **Stored and tracked** as internal data

04 **Leaderboard** rewards the best



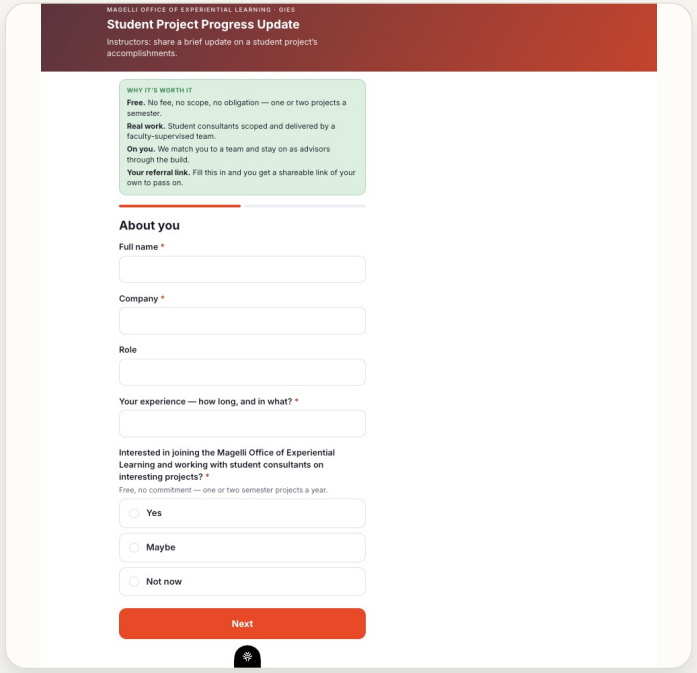
DATA INTELLIGENCE LAYER Every referral shows **where the next client is**

THE SOLUTION · BUILT

The referral form, in action

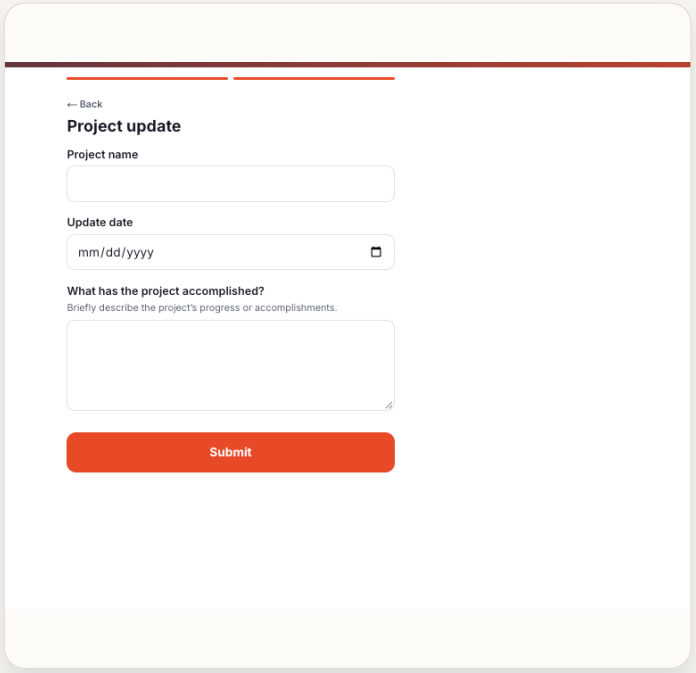
1 About you

Contact, plus “interested in a project?”



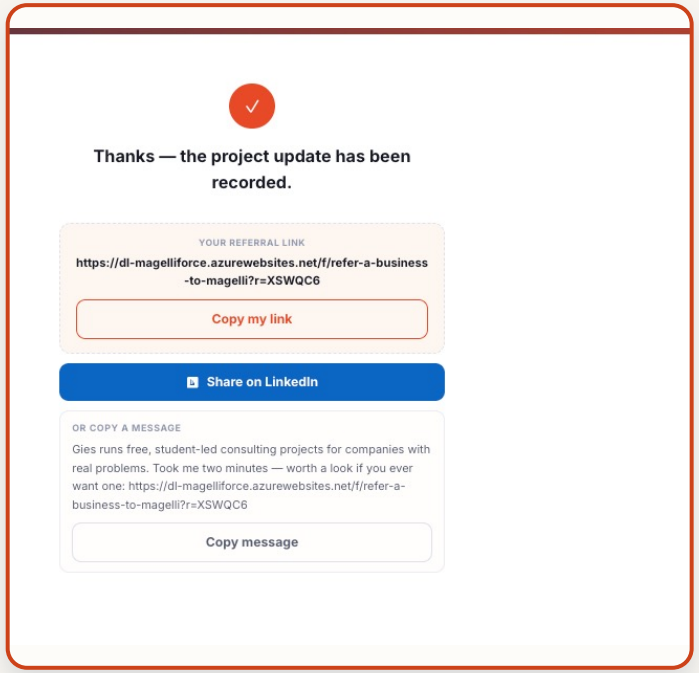
2 Project update

What the project accomplished



3 Referral link

Copy it, share on LinkedIn, or send a ready message

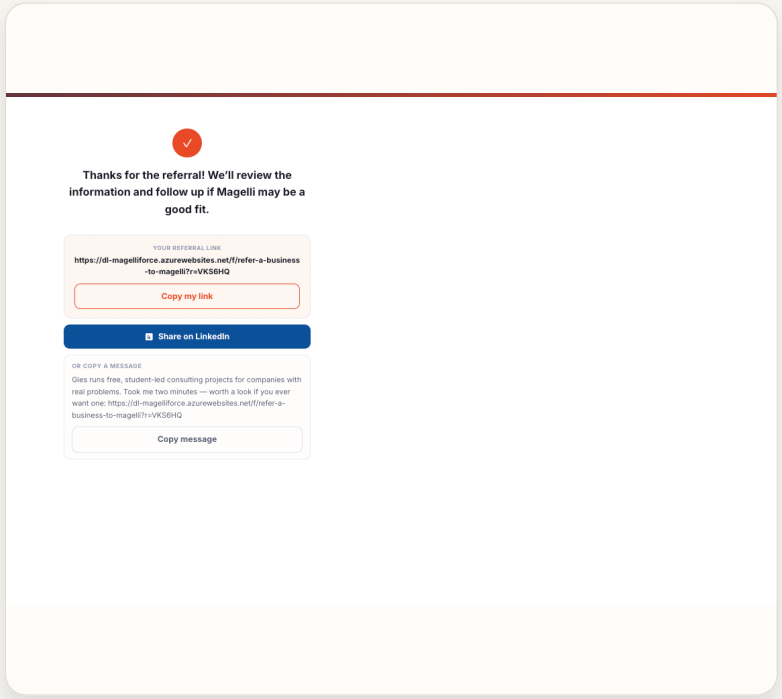


THE SOLUTION · BUILT

What the person they share with sees

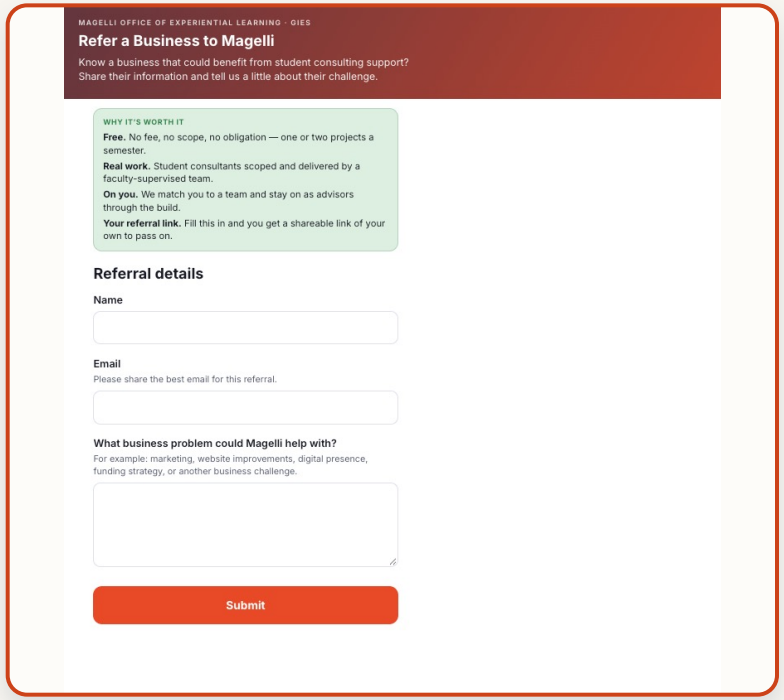
A Refer a Business

Name, email, the problem



B Their own link

The chain keeps going

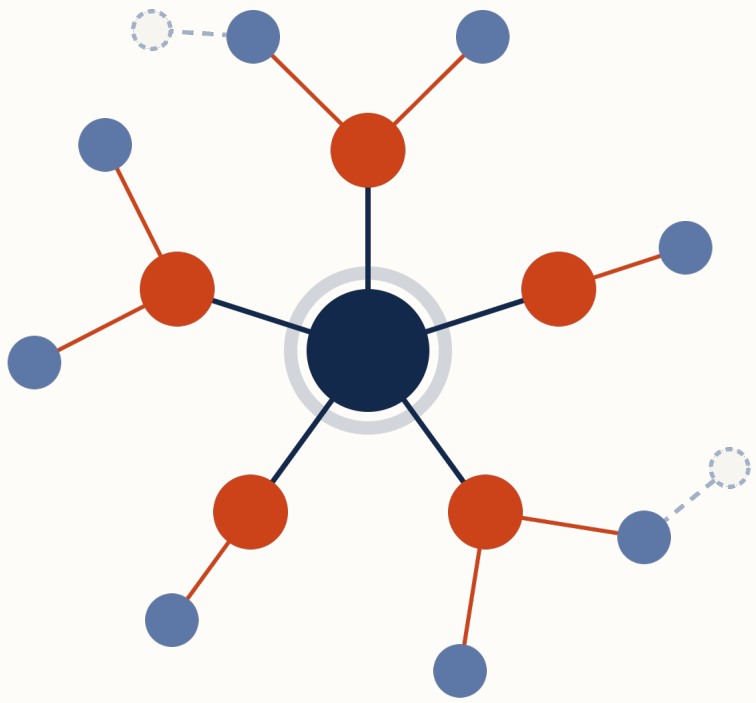


Every referral creates a new referrer

Each link is tracked to who shared it

THE SOLUTION

Every referral grows a network



Future outreach
Warm paths to the next client

Internal insight
Who drives growth, and where

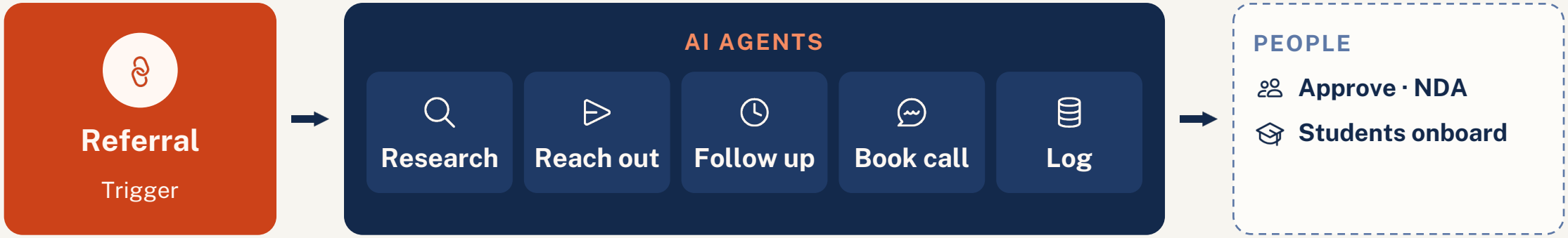
Leaderboard
Rewards come straight from the graph

Trip planning
Salvo heading to a city? See every client and lead there

Illustrative network — no real client data

THE SOLUTION · FOCUS

Referral in → agents take it from there



Focus: **automate everything between the referral and the approval.**

THE SOLUTION

What we'd measure

Staff hours

per week on outreach: [__] → [__]

Reach

prospects contacted: [__] → [__]

Reply rate

replies per email sent: [__%]

Clients signed

projects per semester: [__] → [__]

THE SOLUTION

A one-semester pilot

Learn

Understand the workflow first

Build

Automate returning-client outreach first

Run

Live with real clients — staff approve every message

Decide

Compare to baseline

Wk 1–2	Wk 3–5	Wk 6–10	Wk 11–12

Low risk: **nothing goes out without staff approval.** Go / no-go at week 12.

NEXT STEPS

What we need to start

Walkthrough

An hour with outreach staff

Access

Salesforce + past messages

A sponsor

One owner at Magelli