

IT CONSULTANCY

Case Study: Streamlining Simpala's Multi-Level Data Updates for Enhanced Project Management

Overview

Simpala, is a Salesforce consulting firm with a complex ecosystem of internal users, external suppliers and customers all using Salesforce and Experience Cloud for project management. Much of their work includes but isn't limited to tracking project tasks, managing defects, and monitoring project phases.

Challenge – Complexity in Project Data Management

Simpala faced challenges in maintaining accurate, up-to-date data across multiple related levels in Salesforce and Experience Cloud. Updating project-related records, such as individual tasks nested under phases or logging defects tied to specific components, required users and suppliers to switch between multiple screens and pages. This process was awkward, time-consuming, and frustrating, often leading to:

- **Inefficiency:** Valuable time was lost in data entry instead of core project work.
- **Data Latency:** Updates to complex, nested data structures were often delayed, resulting in less-than-real-time views of project health.
- **User Frustration:** The multi-step process for simple updates created friction and reduced user adoption and satisfaction.



AppExchange ★★★★★

Solution – *Implementing RavenApps Grids*

To address the advanced data management and workflow requirements, Simpala implemented RavenApps Grids into its Salesforce environment. The grid solution provided a dynamic, spreadsheet-like interface that consolidated multi-level project data onto a single screen.

Grids were deployed specifically to simplify the manual process of updating project tasks, defects, and phases. The key benefits were visible through the ability for Simpala users and suppliers to:

1. **View and Edit Nested Data**

Users can now view and directly edit data from parent objects (i.e. Project Phases) and related child objects (i.e. Project Tasks, Hours and Defects) simultaneously within one customisable and flexible grid.

2. **Bulk Updates**

The Grids interface allows instant, bulk edits, enabling suppliers to efficiently update status fields, assignees, or dates for and across numerous tasks at once, eliminating having to open and save each record individually.

3. **Streamlined Operations**

Grids have replaced complex, multi-page workflows with a single, intuitive screen, allowing external suppliers to log and update quickly their time and actions, enabling internal users to maintain in-office oversight.

Results – *The Measurable Benefits & Efficiencies*

Since implementing RavenApps Grids, Simpala has achieved significant improvements and efficiencies:

- **Time Saved:** Simpala users and external suppliers reported a **substantial reduction in time spent on administrative data updates**, allowing them to refocus on core project delivery. **Creating a project is now 22% faster!**
- **Faster Data Access & Accuracy:** The new **streamlined process** via Grids enables more immediate, accurate data entry, giving management **real-time, reliable insights into project status, health and defect resolution.**
- **Enhanced User Experience:** The flexibility and simplicity in using Grids have greatly improved the **overall experience** of working with **Salesforce and Experience Cloud**, particularly for **suppliers who are less familiar with the CRM**. Some even report that: *"It's 10x easier to keep on top of my time logged now."*

Partnership Experience

“Easy to use and scalable. It only took 10 mins to get going with this app which had much more functionality and customisation than I was initially expecting. Out of all the apps tested this offered the closest look and feel to native Salesforce functionality enhancing adoption. Reasonably priced and also compatible with Experience Cloud is another plus.”



David Okpala, Co-Founder, Simpala

David describes his overall experience with RavenApps as highly successful. The partnership was key to solving a critical workflow challenge that standard Salesforce functionality could not address. He credits the RavenApps team's invaluable support and collaborative approach for tailoring the Grids solution to their specific, complex data structure needs. He has already recommended and implemented it for multiple customers.

Advice for Other Firms

For any other Salesforce CRM users considering RavenApps, Simpala emphasises that Grids is an essential tool for any organisation dealing with multi-level, nested data that requires frequent, efficient updating. The time savings and streamlined operations clearly indicate the value RavenApps brings beyond core CRM functionality.