

RECRUITMENT

Case Study: How SwingSearch Enhanced Its Seven20 Recruiting Platform with RavenApps

Overview

SwingSearch is a boutique executive search firm specializing in connecting top leadership talent with high-growth startups. The team leverages **Seven20**, a Salesforce-based ATS/CRM, as the central platform for managing clients, jobs, and candidates.

As SwingSearch's use of Seven20 deepened, the team began to identify opportunities to extend its flexibility and usability – particularly around how recruiters interact with complex data and workflows. To achieve this, SwingSearch integrated **RavenApps Grids**, adding a powerful layer of visualization, interactivity, and customization on top of Seven20's core functionality.

Challenge

While Seven20 provided a strong operational foundation, SwingSearch needed more advanced ways to manage data and optimize workflows in real time. The team wanted to:

- Display **complex relationships**—such as investors, associated jobs, and job leads—in a unified view.
- **Update candidate records and notes inline**, reducing clicks and navigation time.
- **Trigger Salesforce Flows directly** from interactive views, such as creating notes or logging interactions from within a grid.
- Provide recruiters with a **more visual, responsive workspace** that matched the pace of executive search operations.

These requirements went beyond what standard Salesforce list views and reports could offer—prompting the adoption of RavenApps Grids.

Solution

SwingSearch partnered with RavenApps to configure and extend Grids across key Seven20 objects and workflows. Together, they developed targeted enhancements that improved visibility, efficiency, and collaboration:

1. **Investor & Related Job Grids**

Custom grids now display investor relationships alongside active and upcoming job leads. The team can track engagement history and link jobs directly to specific investors—all within a single, dynamic interface.

2. **Candidate Note Creation in-Grid**

Recruiters can now add rich-text candidate notes directly from the grid row. This capability was achieved by linking RavenApps' row actions to a Seven20 Flow that automatically associates each note with the correct candidate and job record.

3. **Editable Parent Fields & Quick Edit**

Fields such as pipeline status and client-facing notes can now be edited inline—without opening separate record pages. This allows recruiters and client leads to make updates in context, improving visibility for both internal and external stakeholders. The Candidate Pipeline grid also includes quick-edit actions and "Go to Record" functionality for seamless transitions between data views.

4. **Integrated Row Actions & Flow Triggers**

Recruiters can now launch custom Salesforce Flows directly from grid actions—enabling processes like note creation or candidate updates without leaving the grid environment.

*The combined Seven20–RavenApps environment has evolved into a **highly visual, interactive workspace** that supports SwingSearch's fast-paced recruiting process and commitment to precision.*



AppExchange ★★★★★

Results

Since implementing RavenApps within Seven20, SwingSearch has achieved measurable operational improvements:

- Increased efficiency: Recruiters and researchers can manage and update multiple records simultaneously, reducing time spent navigating between screens.
 - Enhanced collaboration: Inline note creation and real-time updates ensure consistent information sharing across the team.
 - Improved data accuracy: Editable parent fields and streamlined workflows promote more complete, up-to-date records.
 - Reduced friction: Workflows that previously required multiple page loads or manual steps are now executed from a single, intuitive grid view.
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Partnership Experience

“Working with Peter has been a true partnership. He’s been responsive, iterative, and willing to explore creative solutions with us—whether that’s integrating custom flows, enabling inline note functionality, or refining how our team interacts with data. RavenApps has extended what’s possible within our Salesforce environment and given our recruiting team tools that feel fast, modern, and intuitive.”

Zvezdelina Naydenova | Director of Operations



Both teams worked closely: RavenApps guided setup, shared videos, and troubleshoot; SwingSearch shared recruiter feedback that shaped each new feature.

Advice for Other Firms

For other executive search or recruiting firms using Seven20, Zvezdelina shares:

“If your team relies on Salesforce but needs more flexible, interactive tools for managing searches, RavenApps Grids is a fantastic complement to Seven20. It turns what used to be static lists into living dashboards where you can review candidates, update statuses, and log notes in seconds. For teams juggling dozens of active searches, this combination offers the control of Salesforce with the speed and usability recruiters actually need.”