

NatureBridge

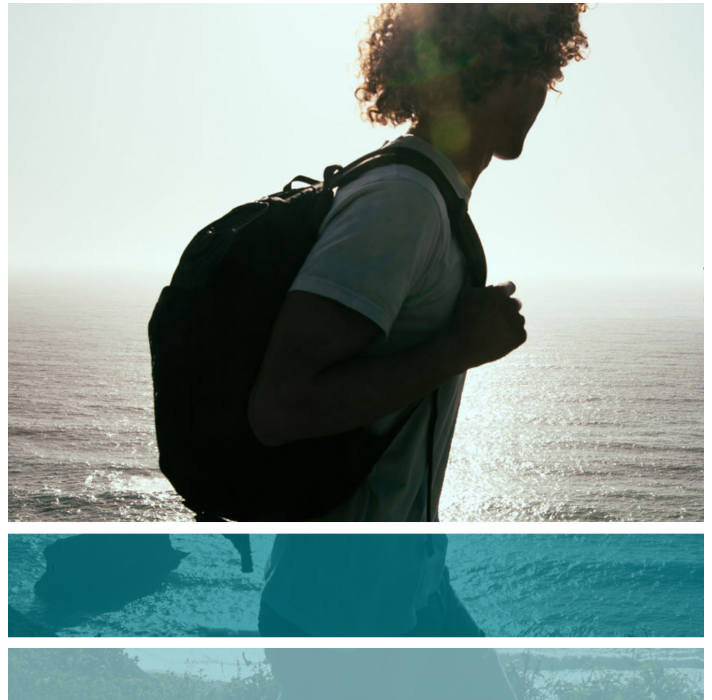
NatureBridge, a leading youth environmental education organization, had built their programs on a mature Salesforce instance with complex custom code. The custom code did not age well and they were unable to use important new functionality. They needed an overhaul to take their programs to the next level.

The Partnership

Each year NatureBridge takes more than 35,000 children into Yosemite and other national parks, providing them with programs, services, housing, and meals – a complex logistical challenge, all tracked in Salesforce. Over the course of a two-year sales process, Dayspring helped NatureBridge’s Salesforce administrator dream and envision a new way forward. Then when their in-house developer was leaving, they hired Dayspring to adopt their custom code and begin work. This kicked off a collaborative process to overhaul and modernize their system. Dayspring worked closely with their talented Admin, allowing her to take on significant project work and grow in her ability to serve their organization. We even co-presented on the power of Flow for nonprofits at a Salesforce Nonprofit Usergroup meeting.

The Challenge

Given the scale and complexity of their work, NatureBridge needed a Salesforce partner who not only had expertise in both declarative and programmatic customizations to adopt their existing code base, but also one who could work with their Salesforce administrator to provide ongoing support, coaching, and enhancements. They envisioned a 3-4 year engagement to systematically move them forward. Dayspring joined the expedition to take their



Salesforce functionality into the future. El Capitan, here we come!

The Project

At the beginning of this engagement, Dayspring’s Salesforce developers and consultants worked with NatureBridge staff to complete a technical assessment of their system, documenting key customizations, identifying parts not built to best practices, determining where custom code and Visualforce pages could be deprecated or rebuilt in Lightning components, and identifying ways to streamline the existing functionality. During this time, Dayspring established an ongoing collaborative relationship with NatureBridge’s Salesforce administrator, with regular check-in calls and a ticketing system to flag and track maintenance and enhancement requests.

The technical assessment allowed Dayspring’s consultants to gain a deep understanding of the NatureBridge Salesforce instance, putting them in a position to help NatureBridge envision their next steps. Transitioning from the Classic to Lightning UI for their sales and operations teams was identified as a key priority area. Dayspring consultants assisted their administrator in testing whether key Visualforce and Apex code still functioned correctly

in Lightning, and where modifications or complete reworks of existing functionality were needed.

During this phase, Dayspring assisted NatureBridge in updating their extensively-used document merge solution, Conga, to work in Lightning; provided input on how to build Lightning pages to fit various user profiles; transitioned from Notes & Attachments to Files; and replaced some programmatic customizations with Lightning Flow and Process Builder. The end result was a modernized Salesforce instance that now makes use of the latest Salesforce technologies and provides end users with a more intuitive, easy-to-use experience.

The Lightning Experience transition also opened up the possibility of further use of Process Builder and Lightning Flow to replace some of the custom Visualforce and Apex Code which had been set up prior to the existence of these declarative tools. Dayspring consultants did a thorough assessment of the remaining Apex classes and Visualforce pages to determine which ones were ideal candidates to transition to point-and-click customizations. Given the faster setup and iterations offered by declarative tools, Dayspring was able to recreate, and even improve upon the existing functionality. In the long-term, NatureBridge will benefit from having more easily manageable and accessible customizations that will automatically be updated and improved by Salesforce during their annual releases.

The latest project that Dayspring and NatureBridge collaborated on was improving their budgeting and historical sales trend reporting. Through the use of reporting snapshots and other declarative automation tools, Dayspring set up a system that now allows NatureBridge to understand how their sales for a given fiscal year change from month to month. Previously, the sales team was copying point-in-time data into a spreadsheet and doing these calculations manually. Now, with reporting snapshots and dashboards, much of that process is automated for them.

Dayspring continues to work with NatureBridge in the ongoing process of upgrading their Salesforce instance. Dayspring serves as a thought partner to NatureBridge's system administrator, and has freed up her time to focus on internal adoption, training, and driving an overall vision for their Salesforce implementation. Future projects on the docket include setting up reporting snapshots to support retention reporting and transitioning their fundraising team (currently using Raiser's Edge) to Salesforce. On the more human side, a mother has the opportunity to raise her daughters in a safe neighborhood, a man is given an opportunity that renews both mind and spirit after a tragic accident, and a senior finally finds a place to call home. MidPen's web home is helping people find real homes. We're grateful to have been a part of the building process.

Technologies

Apex Code, Lightning Components, Lightning Flow Builder, Salesforce Enterprise Edition, VisualForce

“Working with Dayspring has been a dream come true for me. Their technical expertise, communication skills, and quick response time have made them excellent partners. I have more confidence in our Salesforce instance than I ever have before. I cannot imagine a better partner for this project.”

Marya Carr

Salesforce Business Analyst, NatureBridge

“It's never a one-sided relationship when working with NatureBridge, but a collaborative process: our partners at NatureBridge have a deep understanding of their needs and how their existing Salesforce is built, and we bring the additional technical expertise to help continually improve and refine their Salesforce. Along the way, their administrator gets to flex her Salesforce muscles implementing some of our recommendations and learning from our work. Our relationship with NatureBridge is truly a hallmark of how we aim to work with all of our clients.”

Jessica Kwok

Salesforce Principal, Dayspring Partners