THE NATIONAL ABILITY CENTER provides a range of sports and adventure programs for individuals with disabilities. Their programs range from Nordic skiing and mountain biking to horseback riding and rafting. Additional programs include educational classes, social events, and a scholarship. NAC also provides outdoor sport and adventure programs to members of the U.S. military and their families. With base camps in Park City, Salt Lake City, and Moab, NAC is a Utah-based organization. It was founded in 1985 with an original program that provided skiing lessons to veterans.

THE CHALLENGE:
Data Migration, DocuSign, and a Hard Deadline for a New Portal

NAC was in the process of re-organizing their programs; they needed to get internal processes up and running in time for the launch of a volunteer program with community portals. Because they used both Sales Cloud and Community, their largest problem was the need to migrate processes from their old Salesforce Org into a new one. One of NAC's objectives was to create a one-stop-shop for potential volunteers and program participants, making sure that they wouldn't have to deal with multiple screens, log-ins, or digital platforms. They were concerned that such a time-intensive process would be a negative experience for volunteers and dissuade potential participants from signing up. Ultimately, their goal was to create an updated, streamlined system that could be used to register and track volunteers, as well as to charge and collect dues and fees.

NAC also needed updates to their implementation of DocuSign, an electronic signature application. Because DocuSign wasn't fully functional with their old Salesforce Org, it was more difficult to ensure that potential volunteers could have a seamless experience registering and signing a variety of forms from a single digital platform.

THE SALTCLICK SOLUTION:

SaltClick began by asking NAC stakeholders to define and describe major milestones that they needed completed in order to launch their volunteer program by deadline. CN analyzed the case objects that NAC was using, and efficiently asked questions that facilitated the translation of business needs.

Next steps included grooming their backlog of cases and accomplishing a range of internal organization tasks. In particular, SaltClick needed to understand the major categories of data collection that NAC used, ensure that the data migration process ran smoothly, and determine new ways to organize payment flows in Sales Cloud. This included updating and integrating the digital platform that NAC used for its online volunteer portal: because volunteers created profiles that they used for NAC programs, it was crucial for internal NAC stakeholders to connect their forms and payment data with their other information. In addition, NAC was able to integrate DocuSign, which allowed them to send out agreements to registered volunteers, have the documents signed, and organize a flow back into Salesforce. They could see the completed circle of forms from their end, a significant improvement on organization that cut down on costs and time. Finally, SaltClick delivered a comprehensive, online program that could be used for NAC's key objectives: tracking volunteers and payments.

Ultimately, SaltClick accomplished the project within budget and met the deadline—taking just 30 days to complete.

CUSTOMER REPORTED RESULTS:

NAC was able to have a successful launch of their community volunteer and participant portal—including charging and collecting fees. With minimal bugs, NAC employees could clearly observe, catalog, and track a variety of data surrounding the program. NAC stakeholders reported being particularly pleased with the speed of completion for the project.

**purpose.
passion.
partnership.**
SALTCLICK

With multiple levels of digital organization in place, a volunteer could register for a NAC program, pay their dues, sign their waivers, and complete their profile on a single portal; all of their data and documents would then flow cleanly into Salesforce. The result: a snapshot of each volunteer's engagement with the program.