Brooke

Creating a transparent and trustworthy funding submissions portal.

Building an auditable online process using Salesforce Public Sector Solutions [PSS].

How our client built the foundation for their auditable investment and grants submission portal using Salesforce Public Sector Solutions.

The Problem

Our client, an agency approving investment funding submissions, required a customer relationship management (CRM) solution that would allow them to connect more deeply with investees and operate within its systems and processes. It was important to our client that submissions for funding were auditable with an online system and process to enable that.

Thinking Differently

Our client required quick deployment, and traceability in the solution and they wanted a partner who understood their vision and approach to solving their problem.

We partnered with our client to design, build and implement a foundation platform as part of their longer term vision and implementation.

We implemented the Salesforce Public Sector grants management solution, as the product supports an organisation's digital transformation to uniquely fit its mission, rather than making its mission fit the software.

As part of the methodology, we put people who would use the system, at the heart of the solution, working with the client to establish these critical stakeholders. They then all worked collectively, as one team, to ensure the solution was not just an integration with Salesforce on its own but was a solution that worked for the five separate stakeholders in the mix. Along with being people-focused, our approach to designing our client's system also allowed for a quick and efficient implementation with the human-centred design approach making it easier to make numerous changes along the way.
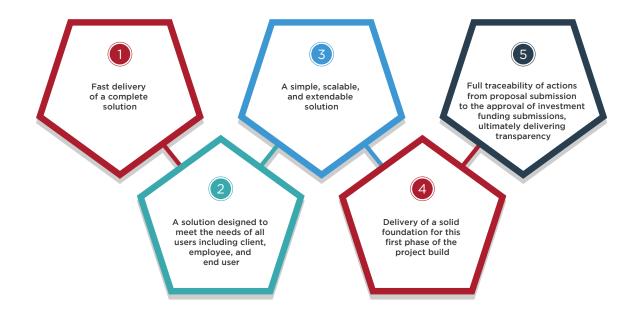
Salesforce Products

▶ Salesforce Public Sector Solutions

Meaningful Results

Key outcomes achieved include:

1 Fast delivery of a complete solution

2 A solution designed to meet the needs of all users including client, employee, and end user

3 A simple, scalable, and extendable solution

4 Delivery of a solid foundation for this first phase of the project build

5 Full traceability of actions from proposal submission to the approval of investment funding submissions, ultimately delivering transparency

Rapid Transformation | Meaningful Results

If you want to solve your problem faster then talk to our Account Directors.

Brooke