



# Case Study

## Educational Nonprofit : Salesforce Classic to Lightning Migration



This case study shows how we helped our client with their Salesforce needs & implementation and how our expertise contributed to their success.

*Client company names can be shared on request*



## WHAT DOES OUR CLIENT DO?

Our client's company was founded on the belief that students need a mentor and a guide during the college application process and throughout college to succeed. By providing consistent one-on-one support, they have helped over 8,000 first-generation students from low-income backgrounds stay in college and complete their degrees.



## HOW DID WE FIRST MEET OUR CLIENT?

Our client's technical & Salesforce team faced overdue technical debt at the end of 2021. Our expert team took on this project. They were impressed with our delivery and the way we handled the previous project, so they gave us another project. They needed a Salesforce architect, developer, and business analyst team which we provided them with to transition from Classic UI to salesforce lighting for Access Programs.

## CHALLENGES THEY FACED BEFORE US

- Due to heavily customized screens developed with code, the internal team faced technical difficulties dealing with maintenance and updates.

- They added more and more fields to their UI, especially in widgets, which resulted in wasted time & increased technical debt.
- Student program needed to be transitioned from classic UI to Salesforce Lightning

## WHAT KEY METRICS HAVE IMPROVED SINCE



The major key metrics that have improved are :

- Migrating one of our client's Salesforce classic applications to Lightning by replacing more than 50 Visualforce pages to Lightning pages with only a single LWC component achieving a minimum amount of custom code & uses of Salesforce out of box features
- Aura/LWC components are designed to expose configurable properties so that LWC components can be configured without modifying code.
- Creating features that can be maintained by Salesforce administrators with less dependency on Salesforce developers.

## WHAT WAS OUR PROCESS?



1

**Planning** - We were able to build a guiding document for our design process.

2

**Design** - Based on the requirements and limitations of our client's current implementation, our technical team designed a solution that would meet their needs

3

**Development** - This is ongoing and is going through the agile methodology of 2-week sprints, with an iterative approach to the implementation and delivery of the system.

4

**Testing** - every story developed by the team is tested before being handed over to the client for their user acceptance.

## WHAT SOLUTION DID WE USE ?

1

**Salesforce Configuration & Development**

2

**Working in Agile Methodology**

3

**Salesforce Solutioning**

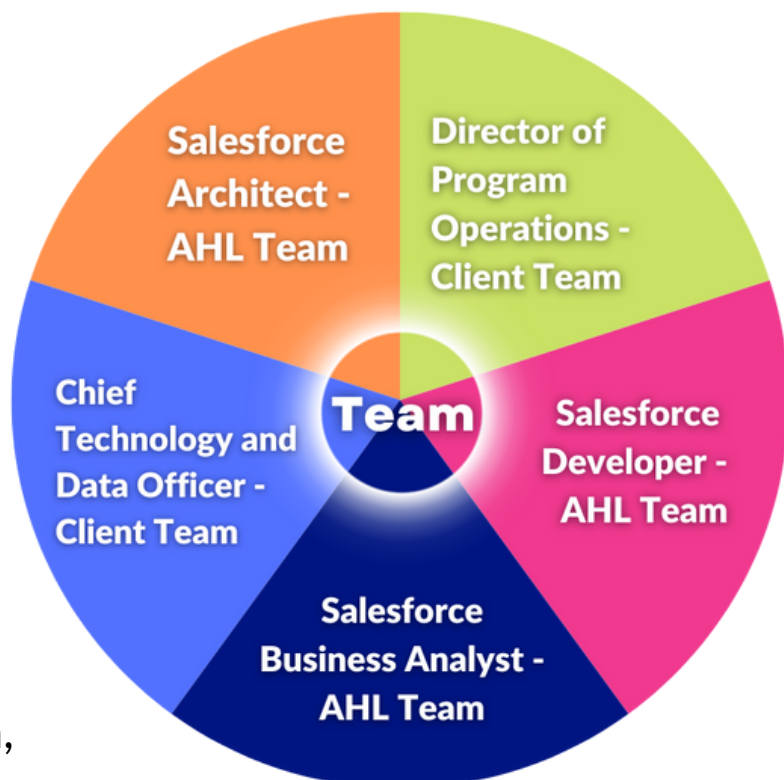


## HOW DID WE ACHIEVE THEIR GOALS?

The first step in implementing Salesforce is to clearly define the needs and wants of our clients. We gathered a team to manage the build in Salesforce. We spent many hours analyzing the years' worth of documentation completed by their Design Team and broke down the project into specific pieces and requirements.

At every step of the implementation, we were in constant communication

and involved them in our design, development and deployment.



# WHY DID THEY CHOOSE US OVER THE COMPETITORS

Co-incidentally, we offered our services to the client in 2021 at the same time when they had difficulty finding the right fit for their Salesforce projects.

Upon seeing our expertise and demonstrated experience, they found us credible & assigned us to their first project. This inspired their confidence in us & since then we have had a long-term working relationship with our client.



## WHAT OUR CLIENT HAS TO SAY ABOUT US?

We brought on a team from Application House Limited to support us with transitioning one of our programs from a very old, hard-coded user interface in Salesforce Classic to a mostly out-of-the-box layout in Salesforce Lightning. It was important for us to preserve the things that our internal users appreciated most and used most often, and the Application House Limited team was able to guide us toward solutions that would feel the most "custom" but would still be easy to maintain as needed. We had done a lot of the discovery and discussion of business needs prior to engaging with Application House, which made the process of scoping technical requirements much smoother for this build than others I have experienced. The work that this team did to fully understand our needs, to document all the work that was done, and to ensure that our internal team was brought along in the process led to one of the most seamless and painless UI adoptions I have ever been a part of. Thank you to the Application house team

### Project Review - Salesforce Verified



Find out more client feedback at Salesforce AppExchange

<https://appexchange.salesforce.com/appxConsultingListingDetail?listingId=a0N3u00000PsCD6EAN>