



*Case Study*

**Nonprofit Educational**

**Organization:**

Manage Service

(Support Services)





# Introduction

Years ago, or maybe just a while back, you took in Salesforce, and it has been the best decision. While your organization has grown, and now you have new requirements that the platform needs to meet.

Perhaps, you now need new functionalities for new areas of operation, or you're looking for extra pairs of hands to upkeep more systems. Maybe you're now looking to place steady support for future requirements you may have from your Salesforce.

For any Salesforce need, a Managed Service Partner is the answer.





# Application House : Salesforce Managed Services Partner

Unlike time-based or SOW-bound contracts of a consulting partner, a Managed Services Partner (MSP) doesn't end the story on just one specific result. MSPs work on an ongoing basis for long periods based on the agreement, not just to accomplish Salesforce requirements but to help you with other IT areas.

The bigger picture is the same across all clients: for Salesforce to remain aligned with its organizational mission. To do so, your Salesforce will need to grow as you do. With Application House Limited by your side, you get:







## **A TEAM**

You get a team in charge of every Salesforce need you may have, from daily management to scalability of the platform.

## **COST-EFFECTIVITY**


You get a holistic, active approach to all your current and future requirements, rather than avail per-project services.

## **A DYNAMIC APPROACH**

An MSP proactively interacts with your Salesforce and your operations, ensuring the CRM platform aligns with your overall business goals.

## **MAXIMIZED INVESTMENT**

With an MSP, you get full access to a team of experts that get you the best of the platform, maximizing your investment.





# Application House as Your MSP

Application House is the Managed Services Partner that you would like. We have always had ready, steady hands for our clients from the beginning. Our service doesn't end in just one project. We offer post-project services and discuss other ways we can support our clients in achieving their goals. Some of what we've accomplished are:

- Technical debts
- BAU task
- Support task
- System Integration
- Development task
- App package uninstallation





# Managed Services or Support Services

A Managed Service Partner (MSP) provides ongoing services for a long period under a renewable contract. As your MSP, we offer managed services for your need for continuing Salesforce support. Below are what you can expect:

- Administrative services - from user management to workflow and process building;
- Support services - answer every user inquiry and accomplish any issue;
- Change services - manage any change necessary in your Salesforce Org, like the adoption and training on new features;
- Development & Integration services - handle the design to maintenance process; and,
- Analytics - support in creating and managing reports and dashboards.



# Our Identity – Salesforce Partner

Application House always aim to give you the right solutions that take your Salesforce to the next level. Our expertise has the stamp of approval of Salesforce, recognized as the following Salesforce Partner:





# Application House's Salesforce Certification

## Admin Certifications



## Architect Certifications



## Consultant Certifications



## Developer Certifications








# Case Study – Application House’s Managed Service/Support Service

## The Client

The client is an organization helping students from low-income backgrounds to get into college, get their degree, and land a job. Their programs provide students with one-on-one support and mentoring, which creates genuine partnerships that they believe are significant to a student's success.





# The Situation

- The client onboarded Application House, together with other partners, to accomplish the list of overdue technical debt they have accumulated by the end of 2021.
- Application House deployed a Salesforce Developer committed to a part-time for the project. After a month of working on the project, the client's Manager of Data and Systems left.
- While the manager was more on the business side, he also handled every Salesforce requirement and Salesforce support for the client, making his role like that of a Salesforce Admin.
- He worked on admin-related activities for their Salesforce, so his absence left the operational management of the platform unattended.



# The Project

The client's Chief Technology and Data Officer notified the Salesforce Developer from the Application House of the Manager of Data and Systems' departure by the first week of January 2022. As such, they have decided to delegate all the admin and support work to him, tasks that are from the tickets on the service desk covering the following areas below:

- user activation or deactivation;
- weekly backups;
- investigating & troubleshooting issues; and,
- routine data updates like caseload reassignment, creating tasks for programs, & freezing program data into student progressions (occurring in March)



# The Project

Since the Chief Technology and Data Officer was on leave, she requested the assistance of a colleague to support Application House's Salesforce Developer with prioritizing program-related tasks as they come in and have a weekly or bi-weekly call to get accustomed to working together.



# The Purpose of the Project

A Salesforce Admin knows how to make Salesforce work to the best of an organization's goals. Their responsibilities are:

- Maintaining the platform;
- Simplifying the use of the platform for users at any technical level;
- Being up to date with new tools, capabilities & releases for the platform.

The role of a Salesforce Admin can be simple or complex, depending on the size and structure of the organization. Regardless, the absence of one means no one to ensure the platform is running smoothly and is being used to its fullest potential.



# The Purpose of the Project

- That is why Application House's Salesforce Developer was assigned to the role: to keep the light on by providing support services, including day-to-day operational support to the business single-handedly.
- Application House's part-time Salesforce Developer provided support service that matched the workload of full-time resources.



# The Results

- The vacancy of the Salesforce Admin role impacted almost everyone on the program side of the organization, including advisors, managers, and program leaders.
- To alleviate this, Application House's Salesforce Developer supported admin-related activities and worked on the service desk tickets, including data-related tasks. He worked on critical issues or minor changes in the platform to cater to the user's needs.



## Here Are Some of the Critical Issues

- One of the tasks Application House's Salesforce Developer continued was on Student Recruitment, which was around 75% complete at the time.
- He learned to use FormAssembly, an enterprise form platform the client uses for student applications, to make New Year Admission changes before the applications started on February 1, 2022.



## Here Are Some of the Critical Issues

- He completed the setup of SSO in Salesforce, an authentication method that allowed users to access several applications using a single login and one set of credentials.
- While working on the tasks, he found areas where automation is necessary. He automated some of the work and created tickets in the backlog for the other areas to be automated, so this can be addressed in the future.



# Here Are Some of the Critical Issues

- Having taken up this role, Application House's Salesforce Developer learned about the organization and their needs, especially on data, to properly support them.
- In that way, the developer was able to maintain the client's Salesforce, ensuring that advisors, managers, program leaders, and students use it to its potential.
- Application House's Salesforce Developer was able to support the continuity of the organization's operations, therefore keeping the light on.



# Client Feedback

*"We brought on Application House to support our team as our in-house Salesforce Admin was planning to transition out of the organization. The Application House team did an exemplary job learning about the organization and our data needs in order to support us. I have worked with data consultants in the past who struggled to learn all of the nuances of our program and our staff's needs, but I had the complete opposite experience with Application House. Over time, we were able to transition from merely focusing on short-term "survival" maintenance to bigger-picture projects like cleaning out old fields, relieving technical debt, and completing important documentation work to help us maintain our systems over time."*

## Project Review - Salesforce Verified



Find out more client feedback at Salesforce AppExchange

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



## In the Pipeline

- As of today, Application House's Salesforce Developer is still working on the admin tasks listed above but now also working on new functionalities while checking off items on the technical debt list.
- The Application House team has also since then helped the client out with other projects such as cleaning out old fields and completing important documentation work to help the organization handle the maintenance of their system in the long run.



# Our Value as your Managed Service Partner

- Application House is committed to becoming your long-term partner. Our dedication to understanding your story, learning how you work, and what you need to help you work reflects that.
- That means you can rely on us for every task that will complete the bigger picture of your Salesforce running at optimum power.
- We bring you along the process, keeping you informed and on pace so you can manage your system, go beyond surviving, and thrive.



# Our Value as Your Managed Service Partner

- And we know how uncertain things are, so to help you level it out we're offering the pro bono program.
- By helping your causes as a nonprofit, we do our part to better the world and bring more good to people.



## Ready to Get Started?

Application House is the helping hand you need to scale your Salesforce, so it matches your future needs. We'll provide you with the right solutions so you can focus on pursuing your missions.

If interested, book a consultation now!

[<https://www.applicationhouse.com/contact-us/>]





**CONTACT US**

**Ready to get the right solutions to your needs?**

Email us at [sales@applicationhouse.com](mailto:sales@applicationhouse.com)! or

You can have a chat with us first on LinkedIn:

<https://www.linkedin.com/company/application-house/>

**Client company names can be shared on request**