



Case Study 1

CLIENT:

Non-Profit Organization,
Chennai, India

BUSINESS:

Sales and Service Cloud

Overview of Client & Project:

A non-governmental organization based in Chennai transitioned from manual data management to Salesforce to improve efficiency. Despite purchasing Salesforce under a Non-Profit plan, they required a customized solution, as the standard offerings did not fully meet their needs.

Key Challenges:

The organization faced significant challenges in moving from manual processes to a digital platform

➤ **Manual Data Management:**

Reliance on notebooks for data entry led to inefficiencies and errors.

➤ **Lack of Automation:**

Needed automation to reduce manual work and improve data accuracy.

➤ **Custom Requirements:**

Standard Salesforce setup didn't fully align with their operational needs.

➤ **Scalability:**

Required a solution that could grow with their expanding operations.

➤ **Technical Complexity:**

- 10+ triggers in 3 custom objects
- 10+ Custom Objects
- 400+ fields
- 10+ Flows
- 5+ Approval Processes

Solutions Provided:

We implemented a tailored Salesforce solution to address these challenges:

Data Migration & Customization:

- Migrated data to Salesforce and developed 10+ custom objects to fit the organization's unique workflows.

Automation:

- Introduced 10+ custom triggers, 15+ Apex classes, and 10+ flows to automate key processes, enhancing efficiency and data integrity.

Validation & Approval Processes:

- Implemented 3 validation rules and an 5+ approval process to ensure data accuracy and accountability.

Training & Support:

- Provided comprehensive training to help the team effectively utilize Salesforce.

Results:

Increased Efficiency :

- Data entry efficiency improved by 70%, with a 60% reduction in task completion time.

Enhanced Data Accuracy :

- Data accuracy increased by 85% due to automated validation and workflows.

Scalability :

- The solution provided a scalable platform, supporting the organization's growth and expanding operational needs.

The move to Salesforce has significantly streamlined their operations, allowing them to focus more on their mission with a robust, scalable digital platform.

