Case Study: Building a Custom CRM Data Visualization App

Background

A mid-sized organization managing a high volume of customer and operational data was struggling to understand how key records within their CRM were connected. Users often had to navigate across multiple screens and related lists to piece together the full context of a customer, project, or transaction. This slowed down decision-making and created inefficiencies across teams.

The client needed a better way to visualize relationships within their data. They wanted a more intuitive interface to explore connections between records, reduce manual searching, and improve internal workflows.

Objective

The organization engaged our team to design and deliver a custom Salesforce-native application that would:

- Visualize data relationships in an interactive, easy-to-understand format
- Improve navigation and reduce the time required to access related records
- Deliver a configurable solution that could adapt to different user roles and future business needs
- Provide a scalable foundation to support growing data volumes and more complex relationships over time

Our Approach

We began with a deep discovery process to map out the organization's data structures, common use cases, and user challenges. From there, we designed and built a fully custom application with the following core features:

Visual Relationship Mapping
The app presents CRM data in a dynamic, graph-style interface. Records appear as nodes, with lines showing their relationships. This allows users to instantly see how records connect, without relying on traditional related lists or reports.

Sidebar Details on Click
Users can click any node to view key information in a persistent sidebar. This eliminates the need to navigate away from the visual or open multiple tabs. The sidebar displays only the most relevant data, reducing noise and helping users focus.

Configurable Object and Relationship Settings
Administrators can control which record types are displayed, how they are labeled, and which relationships are visualized. The app was designed so configuration changes could be made without developer involvement, ensuring long-term flexibility.

Scalable Performance and Filtering
The app includes logic to filter and paginate data to maintain performance, even when visualizing hundreds of records. Filtering options allow users to focus on specific subsets of data to avoid visual clutter.

Cross-Functional Usability
The interface was designed with simplicity and clarity in mind, ensuring adoption across technical and non-technical teams.

Results

After implementation, the client reported several key improvements:

- Significant reduction in the time it took for users to find and understand record relationships
- Better insight into the full context of each customer or project
- More effective collaboration between teams who previously worked from disconnected views of the data
- Increased adoption of CRM data tools due to the improved user experience
- Faster onboarding for new team members through visual learning rather than traditional training materials
- A scalable tool that continues to evolve with the organization's growing needs
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Conclusion

This engagement demonstrated how a thoughtfully designed, custom-built visualization tool can transform the way teams interact with CRM data. By turning abstract relationships into an intuitive and accessible visual format, we helped the client reduce friction, improve productivity, and unlock greater value from their existing Salesforce investment.

The project is a strong example of our ability to design flexible, scalable tools that solve real business problems while supporting long-term growth and usability.