Niyati Vyas – Salesforce & HubSpot Integration Portfolio

Overview

CloudSage Consultancy Inc. team has successfully delivered Salesforce-based grant and program management solutions for nonprofit and community organizations across North America. Each project demonstrates our ability to tailor Salesforce to unique operational needs, ensure compliance with data and accessibility standards, and deliver measurable impact for our clients.

Case Study 1: Small Things Enterprises — Cleveland, Ohio (2025)

Mission: Empower low-income residents through zero-interest microloans and community economic investment.

Challenge

The organization needed a centralized system to manage loan applications, eligibility verification, funding decisions, digital agreements, disbursements, and program monitoring — while improving transparency for funders and community stakeholders.

CloudSage Solution

- Implemented a Salesforce-based funding and loan management platform
- Configured an end-to-end applicant journey: intake → eligibility → committee review → award → disbursement → post-award reporting
- Embedded DocuSign for secure e-signature execution and audit tracking
- Integrated AI-assisted evaluation for financial review and approval support
- Delivered dashboards for program oversight, community impact reporting, and fund utilization
- Designed future-ready governance for banking and donor-system expansion

Outcome & Impact

Enabled streamlined application and approval cycles, reduced administrative handling, and provided board-level visibility into funding outcomes and community metrics — improving service delivery and funder confidence.

Case Study 2: Freedmen Heirs Foundation — Germantown, Maryland (2025)

Mission: Support small- and mid-scale farmers in building wealth and securing equitable market access.

Challenge

Manual grant and program administration limited the organization's ability to scale outreach, award cycles, reporting, and stakeholder communication.

CloudSage Solution

- Implemented Salesforce Nonprofit Cloud with a full grants lifecycle framework
- Designed workflows for intake, eligibility checks, scoring, adjudication, awards, milestones, and close-out
- Integrated Mailchimp, Gmail, WordPress, and Gravity Forms for automated communication and application intake
- Configured donor/program impact tracking to connect funding inputs to community outcomes
- Delivered training, documentation, and post-go-live support

Outcome & Impact

Accelerated program delivery, strengthened transparency and reporting for funders, and empowered internal staff with automated tools to manage grant cycles and stakeholder engagement at scale.

Case Study 3: East Buffalo Development Corp — Buffalo, New York (2025)

Mission: State-funded community revitalization initiative focused on affordable housing and neighborhood renewal.

Challenge

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Fragmented systems for applicant intake, program eligibility, contractor coordination, and post-award monitoring hindered efficiency and public-funding accountability.

CloudSage Solution

- Conducted a full Salesforce readiness and process-improvement assessment
- Designed a scalable Nonprofit Cloud architecture to manage program lifecycle data across applicants, contractors, and funding programs
- Defined workflows for intake, eligibility verification, project execution, and ongoing compliance
- Established reporting and audit-readiness standards for state funding requirements

Outcome & Impact

Created a roadmap for a unified grants and program management system, improving transparency, coordination with state funders, and long-term scalability for community development initiatives.