

COMMUNITY PROGRAM MANAGEMENT & DATA MODERNIZATION



PROJECT OVERVIEW

An organization delivering community programs required a centralized platform to manage program participation, stakeholder engagement, and operational data. Existing processes relied on manual tracking and disconnected systems, limiting visibility into program outcomes and operational activities.

The project implemented Salesforce as a unified CRM to streamline program management, centralize stakeholder data, and modernize legacy systems.

KEY CHALLENGES

- Program participation tracked across multiple spreadsheets and manual systems
- Limited visibility into stakeholder engagement and program outcomes
- Stakeholder records stored across disconnected data sources
- Difficulty generating operational and program performance reports.
- Inefficient processes for managing and maintaining program data.

RESULTS AND IMPACTS

- ✓ **Centralized management of program participation and stakeholder engagement**
- ✓ **Improved visibility into program performance and participation trends**
- ✓ **Reduced manual data management through centralized program and stakeholder records.**
- ✓ **Improved visibility into program participation and engagement trends.**
- ✓ **Enhanced reporting capabilities for operational planning and oversight**

Solution Implemented

Salesforce was implemented as a centralized platform to manage stakeholder information, program participation, and operational data.

The solution modernized legacy data infrastructure while providing structured workflows to support program management and reporting.

KEY CAPABILITIES DELIVERED

Program Lifecycle Management

Configured Salesforce to manage the lifecycle of community programs, including program setup, participant enrollment, and participation tracking.

Stakeholder Relationship Management

Centralized stakeholder records to provide a unified view of participants, partners, and community stakeholders.

Program Participation Tracking

Implemented workflows to track participant engagement, program participation levels, and service outcomes across programs.

Operational Activity Tracking

Configured Salesforce to support coordination of program activities through task tracking and activity management.

Data Migration and Modernization

Migrated legacy stakeholder and program participation data into Salesforce to establish a centralized system for program operations.