Washington Center for Equitable Growth Sales Cloud Implementation

Business process automation and enhancements implemented for a non-profit organization.

OVERVIEW

The Washington Center for Equitable Growth (WCEG) is a non-profit research and grant-making organization dedicated to advancing evidence-backed ideas and policies that promote strong, stable, and broad-based economic growth. WCEG engaged HESFP, LLC to help with advanced process automation and enhancements to an existing Salesforce implementation.

Key Metrics

- Improved tracking of file receipt for Applications
- Improved data quality for Success Indicator records
- "80% of success indicators have more than one contact role. Of those, 47% have two, 22% have three, and 13% have more than three. So we can say that data entry has become at least two and a half times faster."

CHALLENGES

- The WCEG team needed to populate certain field values on a custom object based on keywords in the names of uploaded files, and this process was cumbersome without automation.
- Users had to manually verify specific files required for a record had been uploaded.
- A cumbersome approach to creating records for a critical custom object ("Indicator Contact Role") resulted in missing or incorrect data; the solution required automation to speed up the record creation process and ensure accurate data.

SOLUTIONS

Leveraged "clicks not code" to the extent possible, and code where necessary, to automate field inputs and leverage screen flows for easier data entry.

Easy Data Entry | **Automated Processes** | **Clear Visual Indicators**

1
Intelligent Document Reading

Created a combination of Apex trigger, Custom Metadata Types, and Flow to automate the setting of picklist fields for the custom Application object based on the names of files attached to the record.

2
Conditionally Visible Automation

Created a data entry screen conditionally rendered on a record page until at least one required contact role type is entered. Then, the screen is no longer visible, but is still accessible via a button on the related list.

3
User Friendly Data Entry

Created several Lightning Components that could be embedded in a Screen Flow to enter data for Indicator Contact Roles.

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Evidence for a stronger economy

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RESULTS

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1 **File Upload Flags**

Report status flags are automatically set when files with a given name are uploaded.

2 **Significant Click Reduction**

Users can enter up to then contact roles at a time for a given record with much fewer clicks than previously required.

3 **Clear Visual Indicators**

If no "Indicator Contact Roles" are specified, users see a visual indicator on the record page, ensuring complete data entry.

4 **Ease of Long Term Maintenance**

Apex triggers and flows were built to allow for the easy addition of future automation without the need to touch the underlying Apex code.

5 **Leveraging Key Salesforce Technologies**

Lighting Components were embedded in a Screen Flow to generate the main entry form, create custom navigation on the Flow, and to inform users of a successful save.

> *"There are time savings in terms of training and re-training for staff who enter data at the end of every quarter, after having an "I'm behind" moment.*
>
> *it's easier to grasp now that entering a success indicator is a two-step process."*
>
> ***Daria Stepanova, Administrator***

Products Used

- Custom application development
- Visualforce and Apex
- Lightning and Javascript
- Application development lifecycle and deployment
- Sales Cloud Workflow and Approval Processes

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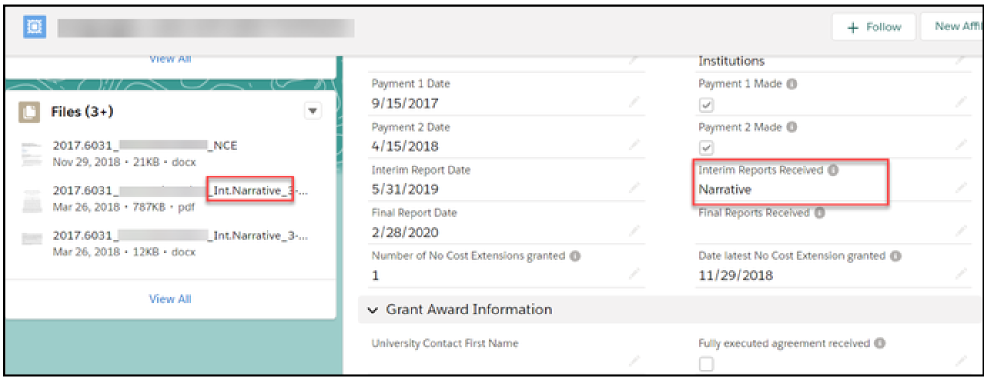
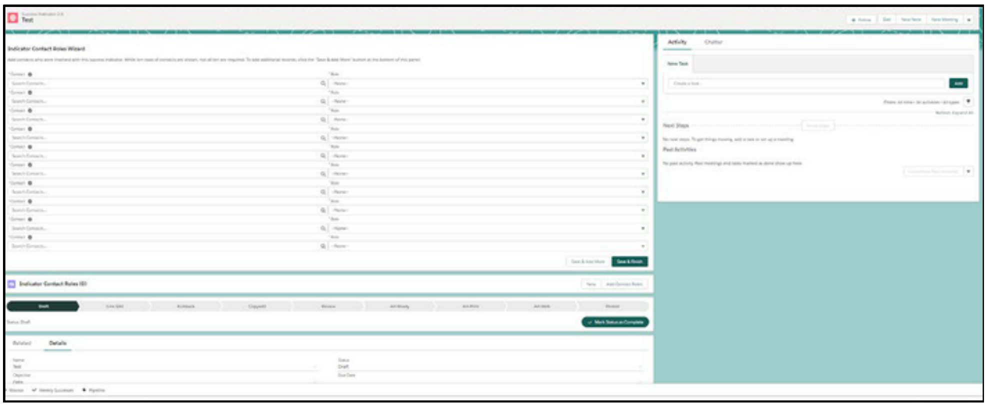
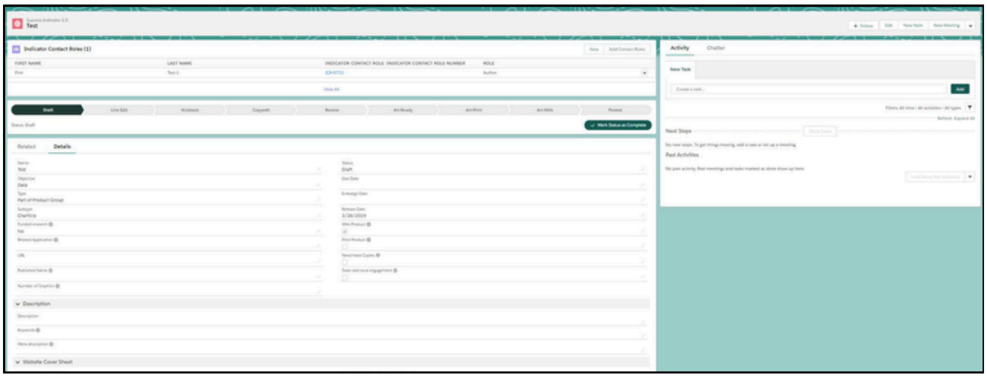
THE APPLICATIONS



Picklist field values are automatically set based on the names of attached files.



An input form displays at the top of the record screen to prompt the user to enter contact roles.



After at least one relevant contact role is entered, the input form is hidden but still accessible from a button.

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