

Exodus Transitional Communities



Problem:

Exodus Transitional Communities had external spreadsheets to track contact data and their interactions. That information was not being synced back to Salesforce, the organization's tool for analysis. Some of the departments were not even using Salesforce at all.

The initial setup, configuration and development of their Salesforce instance was conducted by users that are no longer a part of the team. The initial processes were becoming inadequate, and there was no synergy between management needs and the work completed on Salesforce. As a result, more reports were being created in external data tables, including Excel. These reports were built using data from different sources, both inside and outside of Salesforce.

In addition, Exodus found several duplicate entries created on the Salesforce platform, in part due to using multiple resources to manage, track, and evaluate data.



Solution:

Aspell Services, Inc. added new flows in Salesforce to make data entry more effortless and remind users to keep the information up to date.

We also created formula fields to add KPIs and move management's reports to Salesforce. As for data consistency, we added validation rules and updated matching and duplicate rules to prevent different records from being created for one contact.

Also, a new record type was created for notes, and its sharing settings were configured to only share with the legal team (as court notes are confidential).



Result:

Aspell Services have received positive feedback from the client and continues to work collaboratively with Exodus to make ongoing adjustments in the platform as needed.