



LEGACY INTAKE FORM AND DATABASE CONVERTED TO EASE OF SALESFORCE

| BACKGROUND

A renowned nonprofit organization focusing on autism research and resources that provide lifetime services for individuals and their families worldwide. They were using multiple page PDF intake forms, which then had to be manually input into an Access database, which itself was difficult to use.

Mastek faced challenges that included migrating all data into Salesforce Cloud, enabling the nonprofit to minimize manual data input, and have a 360 view of their clients. Through out-of-the box thinking, the task accomplished as well as ensuring no more invalidated data went into their new Salesforce platform. Now they can also visualize their entire organizational business at the click of a mouse.

| CHALLENGE

The nonprofit's paper intake forms required data entry into an Access database, without validation. Mastek faced the challenge of cleaning that amount of data and modifying the data structure to better align with the Salesforce end model without losing important data along the way.

| SOLUTION

As Mastek has worked with other large nonprofits in large Salesforce implementations, we created an online intake form so that the data entry process was greatly diminished prior to populating the

Salesforce database. Now Salesforce manages program enrollment using opportunities and sales path. Salesforce also provides the nonprofit a 360 view of their business.

- Converting Access database to Salesforce
- Modifying the data structure to align with Salesforce
- Ensuring integrity of old data
- Creating online form with validation rules for user's ease and elimination of manual input
- Setting up Salesforce so that the nonprofit can use its sales pipeline and cloud prediction features
- Enabling the nonprofit to view all client data as well as their own business

| KEY TECHNOLOGIES USED

- Salesforce
- Sales Cloud
- Nonprofit Success Pack



| RESULTS

Overall, the autism research and resource nonprofit organization and Mastek utilized the flexibility of the Salesforce platform to implement, modernize and ensure the integrity of their input process. Now the nonprofit has greatly improved visibility on their clients as well as throughout the business.

The nonprofit has saved a considerable amount of time due to the elimination of the legacy 13-page intake form. There is no further data entry into that form, and it takes no time from online completion until the data populates the database, as well as far fewer data inconsistency issues.

| KEY OUTCOMES

- Better data quality
- Improved visibility on clients
- Easier data entry
- Improved employee efficiency

| ABOUT

Mastek is a turnkey & trusted Digital Engineering & Cloud Transformation partner that delivers Innovative Solutions and Business Outcomes for clients in Healthcare & Life Sciences, Retail, Manufacturing, Financial Services, Government/ Public Sector, etc. We enable customer success and business change programs by partnering with enterprises to unlock the power of data, modernize applications to the cloud, and accelerate digital advantage for all stakeholders. Customers Trust Mastek to deliver Business Value with Velocity and we operate in 40+ countries including the UK, Americas, Europe, Middle East, APAC with ~5000 employees. We are in the business of de-complexing Digital and making our clients future-ready with an industry-first approach. For more details, please visit our website www.mastek.com.

