



## INSTANTANEOUS FORESTRY REPORTING: TRANSITIONING FROM DAYS OF MANUAL WORK TO A CLICK OF A BUTTON WITH SALESFORCE

### | BACKGROUND

The Arizona Department of Forestry and Fire Management (DFFM) protects 22 million acres of state and private lands. They offer fire defense and collaboration on fire control initiatives with partner organizations across the state.

Beyond wildfire response, DFFM's responsibilities include fuel management, community aid, urban forestry oversight, technical assistance, forest health monitoring, invasive species management, and fuel risk reduction. Moreover, the agency is pivotal in upholding building safety and adhering to established codes and standards.

### | CHALLENGES

Historically, DFFM has been reliant on a proprietary Geographic Information System (GIS) to manage forestry projects across their jurisdiction.

However, because this platform was designed to visualize geographic data, it could no longer support the agency's rapidly growing needs in project management. Significant bottlenecks hindered productivity, accomplishment tracking, and data management that negatively affected prospective grant allocations.

In particular, employees were utilizing a mix of Excel, Google spreadsheets, and paper-based processes to track Key

Performance Indicators (KPI). Project managers each employed different methods to capture information which led to disjointed records, data silos, and a patchwork approach to supporting active projects and wildfire mitigation initiatives.

Exacerbated by the software's inability to capture granular time periods like weeks, months, or fiscal years—everyday procedures demanded intensive manual work, wasted thousands of hours, led to duplicate information, and created redundant administrative tasks.

Furthermore, this tool was unable to auto-generate reports, forcing staff to create them by hand with references from GIS spatial analysis and Excel pivot tables. This wasted hundreds of hours for even basic financial inquiries.

In particular, Snapshot Reports would take one to four days and collaboration between two staff, oftentimes District Forester and GIS Specialist—the exact opposite of a 'snapshot'.

“Our GIS setup was not suitable. It was very good for a lot of things, but it was a big pain to create a user interface that was intuitive so the process owner could easily report their accomplishments,” said Wolfgang Grunberg, the GIS and Data Supervisor for the forestry department.

DFFM needed a scalable solution that was low maintenance, easy to deploy, ready to use out-of-the-box, and configurable to their specific needs.

Inspired by the successful Salesforce implementation at their sister agency, the Arizona State Land Department, Grunberg pitched a transition to a Salesforce, a cloud-based CRM.

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—Wolfgang Grunberg,  
GIS and Data Supervisor

## | SOLUTION/RESULTS

The proposal to adopt a CRM like Salesforce for project management was greenlit in 2021. This transition aimed to boost the efficiency of operations, establish a strategy that could support diverse departmental needs for current and future use, and improve user experience.

Boasting a stellar track record of implementing Salesforce platforms for natural resources management teams in Arizona, Mastek proved to be the ideal partner to help transform the agency’s project management processes. They understood that this transition to a CRM could be a lengthy and resource-intensive procedure. So instead of jumping right into development, Mastek chose to unify stakeholders to ensure greater efficiency.

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After a thorough discovery process, Mastek engineered a cloud-based Forestry Information Tracking System (FITS) designed with scalability in mind. Built on Salesforce, FITS integrated various





platforms vital for operations. ArcGIS Online (AGOL) would facilitate bidirectional transfer of information between systems while Nintex DocGen would set the foundation for a new "Project Snapshot" feature that could instantly provide users with a consistent and comprehensive overview.

"They asked all the right questions and understood the nuances of our business. Mastek's discovery was extremely important because it forced us to write down how our process works," said Grunberg.

### **INCREASE IN PRODUCTIVITY AND EFFICIENCY**

The new solution boosted the agency's reporting productivity. Whereas the previous software could only support five staff members at a time, FITS supports over 40 users and only requires two staff members to maintain Salesforce and AGOL.

Previously, summarizing accomplishments for a month of treatment would take three days and up to half a dozen staff to manually collate data across all Forestry Programs. Thanks to FITS, users can input and search for relevant project details in any particular time frame with just a few clicks and minimal cross checking for errors.

Additionally, Salesforce Service Cloud integration enables users to create and modify data schema, forms, and more. This allows employees the agility to mirror the agency's real-world business operations.

Now that information is captured in one main channel and built-in data validations have been implemented, staff have cut down significantly on records updates and correction requests.

What used to take over a dozen workers up to seven days of manual work, now takes a fraction of both time and manpower.

"Since we had our Salesforce implementation running in March, staff have been able to report accomplishments by more specific time periods. We can finally summarize how many acres were treated and see at a glance what funds were allocated," said Grunberg.

### **IMPROVED USER EXPERIENCE AND COLLABORATION**

Salesforce also boosted user satisfaction, greatly improving efficiency and intuitive use of the platform.

Among these enhancements were the introduction of dynamic entry forms, robust data validation and flagging mechanisms, built-in communications via chatter and email, refined auditing capabilities, precise permission settings, and dashboard creation tools.

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Salesforce Chatter, in particular, significantly cut down on communication delays and reduced administrative burdens. Coupled with a 10x increase in data fields, from the initial 30 to a whopping 300, users are able to report more diverse project KPI for disparate projects.

Workers may also track accomplishments by subcategories called Implementation Units as opposed to just 'acres treated'. Implementation Units include, but are not limited to, vegetation and treatment type.

"Team members don't have to ask a tech to access all the emails or records from a person who left the agency. Now it's all baked in, and it allows the process owners to step in, look at the project history, and make changes as necessary," Grunberg states.

### **LAYING THE GROUNDWORK FOR A FUTURE-READY SYSTEM**

While FITS is still in the early stages of adoption across the agency, there are already a host of exciting new features that are yet to be utilized or are currently under development.

Mastek has recently introduced a dedicated mobile app with the goal of allowing foresters to log accomplishments and updates directly from the field. This not only reduces the lag between data collection and entry but also ensures timely updates without having to access a computer.

At present, the new system serves primarily as an accomplishment tracking and reporting tool. Mastek is already working on incorporating more functionalities related to Grant and Forestry Project management. The agency expects FITS to encompass both in-office tasks and field operations, thereby optimizing workflows and enhancing collaboration.

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After the completion of the FITS project, the agency progressed to the next phase of its collaboration with Mastek, which hones budget management processes and provides an in-depth view of grant allocations, expenditures, and remaining balances.



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## | CHALLENGES

- Reliance on outdated project management system
- Limited capacity for future growth and diverse project handling
- Inefficient accomplishment tracking
- Inconsistent data management and time-consuming data entry
- Manual report generation

## | VALUE CREATED:

- New project management system that mirrors real-world processes
- Detailed project tracking capabilities
- Instant, templated reports
- Intuitive UI/UX
- Cross-collaboration features

## | SOLUTIONS:

- Salesforce-backed CRM
- Integration of AGOL (ArcGIS Online)
- Integration of Nintex DocGen for Project Snapshot feature
- Integration of Salesforce Chatter
- Dedicated mobile app for direct fieldwork data logging

## | ABOUT

Mastek is an enterprise digital and cloud transformation partner that engineers excellence for customers in industries such as healthcare and life sciences, retail & consumer, manufacturing, financial services, and public sector across 40 countries, including the UK, US, Europe, Middle East, and Asia Pacific. Mastek helps enterprises decomplex digital and delivers business outcomes with trust, value, and velocity across the spectrum of services including digital experience & engineering, cloud implementations, data, automation & AI, and cloud managed services. A preferred Oracle, Salesforce, Microsoft, AWS and Snowflake partner, Mastek has 6000+ employees and delivers right-fit solutions to both medium businesses and global Fortune 1000 clients. For more details, please visit our website [www.mastek.com](http://www.mastek.com)

