

01 PROBLEM

- Legacy and over-customized CRM and case systems are costly to maintain
- Undocumented customizations make every change risky
- Staff work around the system with spreadsheets and email
- Security settings and access drift over time

02 SOLUTION

- Rationalize the org onto standard Service Cloud, Experience Cloud, and Flow capabilities
- Replace manual handoffs with tracked, auditable workflows
- Document the architecture so it can be supported long term
- Pair every release with training and change communications

03 TECHNICAL APPROACH

- **Assess.** Salesforce Health & Security Check of the current org
- **Plan.** Tech Optimization & Usage Roadmap (TOUR) with phased priorities
- **Build.** Phased rebuild, integration, and data migration
- **Sustain.** UAT, training, knowledge transfer, and managed services

04 BENEFITS & IMPACT

- Lower maintenance burden and fewer workarounds
- Stronger, documented security posture
- Faster, lower-risk release of changes
- Higher adoption across program staff

01 PROBLEM

- Program data lives in disconnected systems
- Reports from different offices do not reconcile
- Duplicate and incomplete records erode trust
- Leaders wait days for answers that should take minutes

02 SOLUTION

- A unified data model with clear ownership and standards
- Integration and migration that connect legacy and cloud sources
- Data Cloud strategy where it fits the mission
- Dashboards and Tableau reporting built for program decisions

03 TECHNICAL APPROACH

- **Inventory.** Map sources, owners, and data quality
- **Govern.** Define standards, stewardship, and access rules
- **Connect.** API integration, ETL, and migration with validation
- **Enable.** Dashboards, training, and knowledge transfer to internal teams

04 BENEFITS & IMPACT

- Reporting leadership can trust
- Fewer duplicate and incomplete records
- Faster answers for oversight and audits
- Internal teams that maintain their own analytics

01 PROBLEM

- Pressure to adopt AI without a clear use case
- Data quality and access are not ready for AI
- No policy for acceptable use, review, or risk
- Pilots stall before they show measurable results

02 SOLUTION

- An AI readiness assessment across data, security, and process
- A governance framework with roles, acceptable use, and human review
- Use cases prioritized by mission value and risk
- Agentforce pilots with defined success measures

03 TECHNICAL APPROACH

- **Assess.** Data, security, and process readiness
- **Govern.** Policy, roles, and human-in-the-loop review
- **Prioritize.** Score use cases on value, risk, and effort
- **Pilot.** Launch, measure, and scale what works

04 BENEFITS & IMPACT

- AI investments linked to measurable outcomes
- Managed risk and clear accountability
- Staff who trust and use the tools
- A foundation that scales beyond the first pilot

01 PROBLEM

- Requests arrive by phone, email, and paper with no single record
- Constituents cannot see where their request stands
- Repeat callbacks consume staff time
- Staff lack the full history when they respond

02 SOLUTION

- Service Cloud case management with intake, routing, and status tracking
- Experience Cloud self-service portals with secure access
- A knowledge base that answers common questions
- Multi-channel outreach and communications

03 TECHNICAL APPROACH

- **Map.** Constituent and staff journeys, end to end
- **Design.** Intake, case, and routing models
- **Launch.** Portal, knowledge base, and secure authentication
- **Adopt.** Training, outreach, and continuous improvement

04 BENEFITS & IMPACT

- Faster case resolution
- Fewer repeat calls and status inquiries
- Self-service available around the clock
- A complete history for every interaction