

Transforming User Experience and Efficiency with Salesforce for a Non-Profit Organization

Discover how Milestone Technologies transformed a non-profit's legacy system into a scalable, efficient platform using Salesforce Non-Profit Cloud, enhancing user experience and operational efficiency.

The Background

The client is a US-based non-profit organization that facilitates international experiences for individuals seeking to enhance their skills through diverse exchange programs. The organization has over 60 years of experience and offers 20+ unique exchange programs annually to over 6,000 participants.

These programs focus on internships, professional development, and cross-cultural learning, helping participants improve their career prospects. Operating in over 100 countries, the organization collaborates with global partners to provide impactful and enriching experiences.

The Business Problem

As digital transformation sweeps through industries, the organization was under pressure to modernize its systems, meet evolving customer expectations, and enhance the usability of its platform to remain competitive and continue delivering high-quality services.

The client's legacy program application, based on an outdated tech stack, was riddled with usability challenges. Users experienced frequent glitches and issues, leading to frustration and decreased engagement. Missing key functionalities further discouraged registrations from both students and professionals, directly impacting the organization's ability to fulfill its mission.

The outdated user interface and overall experience (UI/UX) created a negative perception of the platform, driving the urgent need for a comprehensive system upgrade to restore functionality, enhance the user experience, and streamline operations. Without the upgrade, the organization risked losing its competitive edge in the increasingly digital and automated non-profit space.

The Milestone Solution

Milestone successfully replaced the client's legacy PHP system with Salesforce, carefully designing a comprehensive range of features to optimize the operations of the client's teams. While leveraging Salesforce's built-in capabilities for 20% of the solution, the remaining 80% was custom-built using advanced programming, workflows, and tailored tools to ensure all requirements were met.

Milestone integrated and automated all forms via the FormTitan Tool within Salesforce, enhancing CRM capabilities. Additionally, the integration of Stripe payment solutions ensured high-level security for financial transactions throughout the system.

The Objective

The main objective was to modernize the client's outdated system by migrating it to Salesforce Non-Profit Cloud, enhancing performance, scalability, and user experience. This needed the client to:

- **Migrate the legacy system** from an outdated PHP-based platform to Salesforce Non-Profit Cloud, ensuring better performance, scalability, and an intuitive user interface.
- **Migrate legacy data** seamlessly and securely, including participant records, program details, and historical data, into Salesforce Non-Profit Cloud.
- **Develop custom integrations to connect Salesforce with third-party systems**, such as Stripe for secure payment processing and SEVIS for automating the exchange of participant data with government systems.
- **Implement Salesforce Experience Cloud** for community portals, providing streamlined interactions for program participants, partners, and internal staff.
- **Automate key workflows**, improving efficiency in application processing, approvals, and participant communications using Salesforce automation tools.
- **Enhance analytics**, facilitate data-driven decisions, and track KPIs more effectively by implementing tailored dashboards and reporting features in Salesforce. This would enable real-time insights into program performance, participant engagement, and financial outcomes.
- **Redesign the user experience** within Salesforce Non-Profit Cloud and the Experience Cloud community to improve navigation, ease of use, and satisfaction, and create an intuitive interface for both internal staff and external users.
- **Develop custom apps** within Salesforce to support unique client needs, such as specialized workflows, data management, and additional program-specific functionalities.

Summarizing the key highlights of the solution

- Seamless replacement of the legacy PHP system with Salesforce.
- 80% of the solution was custom-built, utilizing programming, workflows, and tailored tools.
- Integration and automation of all forms using the FormTitan Tool within Salesforce.
- Enhanced CRM capabilities through tailored solutions and workflows.
- Successful integration of Stripe payment solutions, ensuring secure and efficient payment processing.

The Result

Milestone's solution delivered significant improvements across various aspects of the client's system. The new application enhanced both the user experience and operational efficiency, leading to tangible business benefits. Key outcomes include a more streamlined process for both students and professionals, improved system functionality, and secure payment automation.

The key outcomes included:

- Efficient and secure application usage for student participants.
- Rapid increase in professional users due to improved system compatibility.
- Potential revenue growth due to increased professional usage.
- Simplified enrollment process via automated email notifications.
- High-level security in automated payment processes.
- Easier and well-defined forms have made it easier for participants to complete and proceed.

Key Learning

The key learnings from this project highlight the importance of meticulous planning, coordination, and collaboration across various aspects of implementation.

- **Data Migration Challenges:** Migrating legacy data from the PHP system to Salesforce was a complex process requiring meticulous planning, testing, and validation to ensure data integrity and minimize disruption. This emphasized the importance of collaboration between Milestone and the client.
- **Third-Party Integration:** Integrating systems like Stripe for payment processing and SEVIS for government compliance was essential but required careful coordination. Custom apps and APIs were developed to ensure seamless integration, demonstrating the importance of building robust solutions that align with both internal processes and external regulations.
- **Vendor Collaboration:** Working alongside an external vendor required clear communication and a collaborative approach to achieve shared project goals, especially during complex integrations.



Why Milestone

Milestone Technologies was chosen for its proven track record in delivering tailored digital solutions for non-profit organizations. As a Salesforce Elite Partner, Milestone brought deep expertise in implementing customized solutions that address unique operational challenges.

Our team's extensive experience in data migration, third-party system integration, and automation ensured a smooth and efficient transition from the legacy system to Salesforce Non-Profit Cloud. Milestone's commitment to excellence, combined with its customer-centric approach and people-first policy, helped the client achieve its digital transformation goals, making us the ideal long-term partner for future innovations.

About Milestone

Milestone Technologies is a leading global IT services and digital solutions provider that collaborates with organizations worldwide to revolutionize their technology infrastructure and digital capabilities.

With a strong commitment to innovation and customer satisfaction, we empower businesses to accelerate their digital transformation journey and unlock new opportunities for growth and success.

By leveraging our extensive expertise in cutting-edge technologies, we provide companies with the agility and scalability needed to stay ahead in today's rapidly evolving digital landscape.

CONTACT US

Contact Milestone today to take your business to the next level.

Know More →