

CASE STUDY

# HandsOn Twin Cities

Unlocking the potential of Salesforce





# HandsOn Case Study

## Unlocking Salesforce's Potential

**Digital Mass partnered with HandsOn to help them drive adoption to the platform and get the most out of their Salesforce implementation.**

HandsOn Twin Cities (HOTC), a company that connects corporations and individuals with volunteer opportunities, needed help realizing the full potential of their Salesforce implementation. As an organization dependent on data - from membership fees to contact management - they need one central location to track numbers and client interactions.

One year after the initial implementation, the team realized there were still some missing pieces to the puzzle; they needed the platform to fit their business processes better and more insight into information to properly track volunteers and donations.

Digital Mass saw this as an opportunity to optimize, educate, and drive adoption to the platform.

## Small Steps, Big Moves

Starting with planning, Digital Mass took a targeted approach to achieve HOTCs goal of unlocking Salesforce's potential. Starting with Sprint 0 to learn about how HandsOn members were using Salesforce, we uncovered that the platform was initially implemented with an array of capabilities that the team wasn't taking advantage of because they weren't trained to. It was a classic case of the platform being overbuilt and undertrained.

While it's common for implementers to build Salesforce beyond what a team needs, it's not as common for them to teach users how and why to use the platform. It might not necessarily be part of their job, but it's a critical piece that differentiates teams who use and adopt Salesforce and those who let it collect dust.





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We also learned that all three programs shared a common goal: make reporting easier.

Rather than deploying dedicated resources to this quick project, we were able to utilize the Digital Mass FlexPool to deliver Salesforce optimizations quickly.

The FlexPool dove in right away building reporting templates, collaborating with the HOTC team to create a standardized reporting process, and a new event and project tracking tool that was built using General Accounting Units (GAUs). Towards the end of the engagement, we designed and delivered a Salesforce Playbook that explains how to use and adopt the platform. As we worked alongside the HOTC team, it was important that they knew how to use the new features. Going forward, this playbook will allow the team to onboard and train new users with ease.

With new knowledge about how to use the platform, HOTC has seen full adoption to Salesforce across programs. Now all members can see each touchpoint members have with key accounts, track donations coming in, and easily run reports.



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## What We Did



Developed a step-by-step user guide and facilitated a guided walk through so they can get the most out of the Salesforce platform.



Created a tracking system using general accounting units (GAU) for the program to easily track the donations coming in.



Developed a common process for creating events and projects that could be used by all of HandsOn programs.



Created reporting templates and standardized the reporting process to help all pro bono programs adopt the platform and easily track/report on data.

## What We Learned

- Training and focus matter
- It's all for nothing unless everyone uses it

Salesforce is one of the most powerful tools on the market with a near limitless set of features, but focusing on the most productive areas and educating users on how to use the platform has a major impact on creating the desired 360° view.

“From the first meeting with Digital Mass, they really honed in on our top priorities and made substantial progress on our Salesforce platform with a quick turnaround. We now have a clear view into the numbers that drive our business, and our teams are fully using the platform.”

**Katie Walsh, Program Director, HandsOn**



# About Digital Mass

## About Us

### The new wave of Salesforce experts building next-generation customer-focused sales solutions.

Founded in 2017, Digital Mass is a Salesforce Partner focused on turning your Salesforce implementation into a customer-focused juggernaut. Not only do we have the engineering acumen needed to build modern tech solutions, we have the craftsmanship to deliver brilliant results for clients with complex processes.

Our team of full-stack stars are in the sweet spot between ambitious, nimble, curious, and excited. We bring our clients source-driven implementation through purpose-driven processes. The strong foundation we have in web services allows us to play well with other technology: AWS, Salesforce Marketing Cloud, Tableau, and virtually any other major sales or marketing software. A new source-driven age has dawned in Salesforce and Digital Mass is at the Apex...(sorry for the pun).



# LET'S CONNECT

Let's work together to design, build, test, secure,  
and implement a killer Salesforce Machine.

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