A leading research institute from Illinois accelerated its overall efficiency with Salesforce customization and integration.

The client is a century-old research institution based out of the University of Chicago, Illinois. They conduct surveys and research programs with the concurrence of citizens by collecting their habitual and medical programs to provide reliable data and rigorous analysis to guide critical decisions.
Challenge

- The survey and research programs were run by the various research managers, along with field interviewers and lab technicians working for the client. As part of the research process, the client’s team had to manage a complex process that requires them to conduct the interviews, collect samples and specimens, provide wearables gadgets to respondents, collect them back, and make them complete the questionnaire.

- These data were collected using word/excel and had to be manually published by the team to the case management system. The data entry into the case management system was manually done, which not only consumed time, but also was affecting the team’s productivity and resulted in frequent data errors.

- Hence, the client wanted to build an application that can help the research team to track the respondent’s involvement in the program and the status of bio-sample shipments to laboratories and also integrate Salesforce with their case management system.

Solution

- The DemandBlue team proposed customization of the Salesforce solution to best fit the client’s needs after working closely with the client’s research program managers to understand the existing process and systems.

- The proposed solution to the client included building a data collection and receipt management application on the Salesforce Platform to manage their longitudinal study. We recommended leveraging Salesforce platform capabilities and set up to transition from their legacy case management solution to Salesforce in future phases.

- The solution also included integrating it with the client’s existing case management setup using pre-scheduled Command Line Interface Data Loader (CLI Data Loader) and setting up reports and escalation paths to track the receipts that did not adhere to the service level agreements. An end-to-end case tracking system was set up, and the users were given the handholding of the system.

Benefits

- The data collection and management application built on the Salesforce Platform simplified the longitudinal study process.

- User-friendly system for the end-users accelerated team productivity by 35%

- An end-to-end automated tracking process improved overall efficiency and reduced the time consumption by more than 80%.