

Case Study

Driving Social Impact Through a Salesforce-Powered Assistance Ecosystem



Customer Overview



Customer

A mission-driven nonprofit



Profile

The client is focused on ending homelessness by connecting vulnerable individuals and families with housing, financial assistance, and essential community services through digital innovation and partnerships.



Industry

Nonprofit



Services

Salesforce Cloud Implementation and Customization

Business Need

The nonprofit faced a fragmented operational environment that limited its ability to deliver housing, financial assistance, and community services efficiently. Key challenges included:

- Manual and time-consuming workflows for landlord onboarding, property allocation, and case management
- Disconnected AWS portals, Airtable, and legacy databases, leading to inefficient data sharing
- Limited visibility into available housing units, client data, and program performance
- Inconsistent tracking of client history, property assignments, and violations
- Poor collaboration across administrators, service providers, and external partners
- Scaling challenges due to the increasing demand for services and multiple programs running concurrently

Key Requirements

- Centralized management of landlords, properties, clients, and service providers
- Automated workflows for onboarding, allocation, and case tracking
- Real-time visibility into housing inventory, applications, and program metrics
- Secure and compliant handling of sensitive client data
- Mobile-responsive portals for landlords, administrators, and residents
- Future-ready platform capable of scaling with growing programs



Solution and Approach

Synoptek implemented a comprehensive Salesforce-powered solution that unified operations, automated workflows, and enhanced service delivery across housing, financial assistance, and community programs.

The approach was strategic and phased, focusing on efficiency, scalability, and user adoption:

- **Phase 1: Data Migration & Integration** – Cleansed and migrated legacy data from Airtable and other systems into Salesforce. Enabled bi-directional integration with AWS portals to sync landlord and property details in real-time.
- **Phase 2: Core Functionality Deployment** – Configured Sales Cloud and Service Cloud to manage landlord relationships, property listings, unit availability, and case management for residents. Automated approvals and onboarding processes reduced manual intervention.
- **Phase 3: Citizen & Landlord Engagement** – Rolled out Experience Cloud portals with mobile-responsive, role-based dashboards. Designed accessibility-first features for seniors, veterans, and individuals with disabilities.
- **Phase 4: Reporting, Compliance, & Continuous Improvement** – Built real-time dashboards and reporting tools to track housing inventory, applications, case progress, and program performance. Implemented HIPAA-compliant security and role-based access controls.



Solution and Approach

Salesforce was chosen for its flexibility, security, and scalability, allowing Synoptek to deliver a centralized, integrated, and future-ready platform.

Salesforce Components Implemented

- **Sales Cloud:** Managed landlord relationships, property listings, and onboarding automation.
- **Service Cloud:** Centralized case management, tracked client interactions, service history, and support requests.
- **Experience Cloud:** Delivered self-service portals for landlords, administrators, and residents with personalized dashboards and mobile accessibility.
- **Custom Objects & Data Model:** Structured tracking for landlords, properties, units, clients, and service requests.
- **Automation (Flows & Process Builder):** Streamlined onboarding, approvals, property allocation, and case updates.
- **Integration Framework:** Bi-directional integration with AWS and unidirectional integration with Airtable for real-time data sync.
- **Reporting & Dashboards:** Provided administrators with actionable insights into inventory, applications, and program performance.
- **Security & Compliance:** Implemented role-based access controls and HIPAA-compliant safeguards.



Business Benefits

The Salesforce-driven solution enabled the nonprofit to significantly enhance efficiency, scalability, and service delivery. By consolidating operations into a single platform, the client improved visibility, reduced manual effort, and accelerated housing allocation for individuals in need.

Improved Efficiency

Automation of onboarding and case management reduced manual effort and sped up processes

Enhanced Visibility

Administrators gained real-time insights into landlords, properties, clients, and program activities

Accelerated Matching

Housing units and services were allocated more quickly and accurately to those in need

Strengthened Collaboration

Seamless coordination between administrators, landlords, and service providers improved program effectiveness

Enabled Scalability

Supported multiple programs and growing demand without additional overhead

Improved Data Security & Compliance

Sensitive client data handled securely, with regulatory compliance and audit-ready reporting

Managed **400+** properties and **1,200+** units under housing programs

Served **12,000+** families and processed **8,000+** applications

Facilitated **\$50 million** in fund distribution for assistance programs

About Synoptek

Synoptek is the first IT Managed Experience Provider (MxP™), delivering AI-enabled automation, strategic modernization, and experience-led outcomes. Its services span Cloud and Agile Infrastructure, Business Applications and Platform Development, Customer and Employee Experience, and Cybersecurity. With a business-first approach and a global delivery model, Synoptek helps organizations optimize operations, accelerate transformation, and achieve measurable results—guided by a culture rooted in growth, ownership, inclusiveness, and philanthropy.



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