



SUCCESS STORY

30% More Productivity,

12% More Revenue in One Quarter:

**How Covius Transformed Salesforce with
GridMate**





By implementing GridMate, Covius resolved critical challenges in their Salesforce platform, transforming data management and enhancing overall efficiency. The streamlined interface and advanced automation tools boosted user engagement, significantly reduced errors, and made administrative tasks faster and more accurate. Covius also achieved greater operational agility, with improved data accessibility and decision-making capabilities, enabling teams to collaborate easier and work smarter.





THE CUSTOMER

Covius is a leading provider of tailored technology and services for financial institutions, including credit and verification, HOA and tax tracking, compliance, document management, and real estate settlements. These solutions streamline operations and ensure compliance. Covius also offers specialized services like lien and title curative, REO asset management, and capital markets due diligence.

Recognized with the HousingWire Tech100 award (2019 - 2024), Covius is known for its innovative, cloud-based solutions that enhance efficiency and support stakeholders in financial and real estate sectors. However, despite its technological prowess, Covius faced significant challenges in managing data and ensuring efficient workflows within their Salesforce platform, prompting the need for a solution like GridMate.





THE CHALLENGE

- ① Limited data management capabilities
- ① Inefficient data visualization
- ① Reduced data accuracy
- ① Low user adoption
- ① User Interface / User Experience (UI/UX) limitations: cluttered views, complex navigation, unintuitive design

Before implementing GridMate, Covius faced several operational hurdles that slowed their workflow and hindered efficiency





Limited Data Management and Visualization Capabilities:

- **Native limitations:** The standard Salesforce interface restricted the number of columns and rows displayed in list views and related lists, hindering efficient data management.
- **Manual processes:** Without mass update features, users had to carry out edits and updates on each record, which was time-consuming and inefficient.
- **Limited editing capabilities:** Due to the limited inline editing capabilities in Salesforce, users could not edit multiple records simultaneously, which hindered productivity, especially when handling large datasets.
- **Difficulty in handling complex data relationships:** The lack of advanced visualization tools made it hard to visualize and manage inter-related data effectively





User Interface and User Experience (UI/UX) Pain Points:

- **Complex navigation:** Users found it challenging to navigate between multiple tabs or screens to find or edit data quickly.
- **Non-intuitive design:** The lack of user-friendly features made the platform less appealing and harder to adopt, leading to low engagement among employees.

Reduced Data Accuracy:

- **Error-prone data entry:** Manual processes increased the likelihood of human errors, leading to inaccuracies in the data.
- **Inconsistent updates:** The inability to perform bulk updates meant errors or outdated information could persist longer, affecting downstream processes and reporting accuracy.





User Adoption Hurdles:

The standard Salesforce interface lacked user-friendly features, making it less intuitive for employees, which discouraged full utilization of the platform. This underutilization led to missed opportunities for automation and optimization, further impacting productivity and ROI.

Collectively, these challenges led to decreased efficiency, reduced data accuracy, and operational bottlenecks, ultimately affecting Covius's ability to leverage Salesforce to its full potential for decision-making and growth.





THE SOLUTION

- **Enhanced data management** through expanded data views, true inline editing, mass updates and Salesforce Flows
- **Improved User Interface / User Experience (UI/UX)** through Excel-like functionality and customizable grids
- **Advanced data visualization** through Kanban Views and Field Set Grids
- **Increased efficiency and data accuracy** through bulk operations and real-time updates
- **Automated repetitive and routine tasks** through Salesforce Flows





THE SOLUTION

GridMate delivered a suite of features and components that addressed these challenges, enhancing Covius's Salesforce environment and significantly improving operational efficiency:

COMPONENT / FEATURE	PURPOSE	IMPACT
Related List Grid	Displayed related lists with advanced features, overcoming Salesforce's standard UI limitations on the number of columns and rows.	Enabled users to view and manage related records efficiently, facilitating better data visualization and accessibility.
List View Grid	Presented list views with enhanced capabilities, allowing for more columns and rows than the standard interface.	Provided users with comprehensive views of data sets, improving data analysis and decision-making processes.



COMPONENT / FEATURE	PURPOSE	IMPACT
Inline Editing & Mass Updates	Allowed users to edit records directly within the grid and perform bulk updates, streamlining data entry and modification.	Reduced manual effort and minimized errors by enabling quick edits and updates across multiple records simultaneously.
Interactive Filters	Offered advanced filtering options, providing a spreadsheet-like experience within Salesforce.	Enabled users to filter data efficiently, saving time and enhancing usability.
User Grids	Provided customizable grids with features like data filtering, sorting, record grouping, and layout customization.	The customizability, coupled with the actionable UI and advanced capabilities, boosted productivity and user adoption, while helping to overcome native limitations.



Leveraging these GridMate features and components, Covius was able to enhance its data management capabilities, overcome limitations in data visualization, improve the Salesforce user experience, and increase data accuracy and overall operational efficiency:

Enhanced Data Management

- **Expanded data views:** GridMate's List View component allowed users to display list views with advanced features, overcoming Salesforce's standard UI limitations on the number of columns and rows.
- **Inline editing and mass updates:** The grids also enabled inline editing and mass updates directly within the grid interface, streamlining data entry and modification processes.





Improved User Interface and User Experience

- **Excel-like functionality:** GridMate provided an interface similar to Excel within Salesforce, allowing users to add child records as if they were adding rows on a spreadsheet, which simplified data entry and enhanced user adoption.
- **Customizable grids:** With GridMate's versatile User Grid component, users were able to customize grids to their specific needs, improving data management, navigation and data visualization.

Advanced Data Visualization

- **Kanban Views:** Components like the Kanban List View Grid enabled users to display records across a navigation path, facilitating better management of complex data relationships.
- **Field Set Grids:** The creation of grids based on field sets provided flexible data presentation options.





Increased Efficiency and Data Accuracy

- **Bulk Operations:** The ability to perform bulk updates and edits reduced manual entry errors and accelerated data management tasks.
- **Real-Time Updates:** Changes made through GridMate were reflected in real-time, ensuring data consistency and accuracy across the organization.

Salesforce Flows alongside GridMate

The solution employed by Covius also integrated Salesforce Flows to enhance follow-up processes for campaigns, streamlining communication and boosting engagement with leads and contacts. This addition further addressed operational pain points by introducing automation and reducing manual effort in the campaign lifecycle.





THE IMPACT

- ✓ 25% increase in Salesforce adoption
- ✓ 30% reduction in data entry errors
- ✓ 30% reduction in time taken for data management tasks
- ✓ 46% reduction in time taken for routine administrative tasks
- ✓ 35% increase in data utilization frequency for decision-making
- ✓ 12% increase in revenue within the first quarter post-implementation





The implementation of GridMate led to significant improvements across various operational metrics, with tangible benefits in data accuracy, efficiency, and overall performance, as evidenced by the following metrics

- **Data Accuracy:** Manual data entry errors decreased by approximately 30%, resulting in more reliable and consistent information across the organization.
- **User Adoption:** The user adoption rate increased by 25%, indicating enhanced engagement and satisfaction with the Salesforce platform.
- **Productivity:** Teams experienced a 20% boost in productivity, attributed to streamlined workflows and reduced manual tasks.
- **Data Utilization:** The frequency of data utilization for decision-making purposes rose by 35%, reflecting improved data accessibility and usability.





Through the combined implementation of GridMate and Salesforce Flows for campaign automation, Covius achieved the following productivity and revenue-related results:

Lead Follow-Up Time

- **Reduction in follow-up time:** Automated follow-up processes using Salesforce Screen Flows reduced lead response time by 50%, enabling the team to engage with potential customers within 24 hours of campaign interactions, compared to the previous 48-72 hours.
- **Faster conversion rates:** Shortened response times led to a 15% improvement in lead conversion rates.

Time Savings Per Task

- Data entry tasks that previously required an average of **15 minutes** per record were reduced to **8 minutes**, resulting in a **46% time savings** across routine administrative tasks.





- **Campaign ROI:** Automated, timely follow-ups with leads and contacts generated from campaigns resulted in an estimated **12% increase in revenue** within the first quarter after implementation.
- **Improved engagement:** Consistent follow-ups led to a **10% higher customer retention rate**, contributing to recurring revenue growth.

Reduction in Errors

Automated and streamlined processes led to a **30% decrease** in manual errors, ensuring more accurate customer data.

User Adoption

The adoption rate of Salesforce tools increased by **25%**, as employees found the enhanced interface to be significantly more intuitive and efficient.





GridMate's integration into Covius's Salesforce environment addressed the company's most pressing challenges - inefficient data management, low user adoption, and complex workflows. The implementation not only streamlined operations and improved data integrity but also laid the groundwork for scalable growth and higher ROI.

Covius's success story is a testament to how GridMate's innovative features can transform Salesforce into a more powerful and user-friendly platform, driving both operational and revenue growth.

