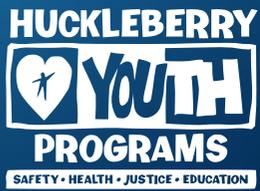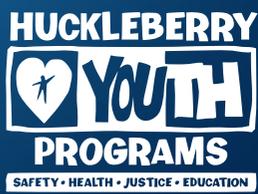# SUCCESS STORY

Beyond Boundaries:

How GridMate Supercharged Huckleberry Youth Programs Salesforce User Experience, Driving Data Excellence

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Using GridMate, Huckleberry Youth Program showed **increased Data Integrity, Efficiency, and Performance** in their daily tasks by enhancing the User interface and User experience within Salesforce.

THE CUSTOMER

Huckleberry Youth Program is a non-profit organization dedicated to providing and empowering young people with services that promote safety in times of crisis, physical and emotional health and well-being, social justice in communities facing inequality, and educational success.

With roots dating back to 1967, Huckleberry Youth Programs has been a pioneer in youth advocacy and community health in the Bay Area. What began as San Francisco's first shelter for runaway youth has grown into a comprehensive network of programs offering health services, mental health counseling, education support, and juvenile justice diversion. Serving over 7,000 youth and families annually, Huckleberry is grounded in values of equity, respect, and resilience – meeting young people where they are and equipping them with tools to thrive.
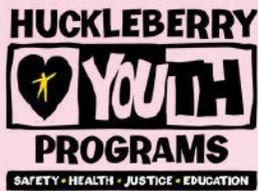
THE CHALLENGE

- ⚠ Maintaining and managing non-native Skuid platform.

- ⚠ Maintaining VisualForce classes and pages.

- ⚠ Extended user onboarding time and frequent confusion amongst users about data entry.

- ⚠ Data accuracy issues owing to non-streamlined workflow.

As a **non-profit organization**, accurate data is essential for Huckleberry Youth Programs to provide stakeholders with valuable insights and demonstrate accountability.

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However, the limitations of native Salesforce functionality, such as the ability to **filter related lists, customize labels, or bring in data from other objects**, posed challenges. Huckleberry has many teams doing varied work, so they have distinct use cases. A generalized data model with data spread across multiple objects made having a streamlined workflow for all the teams challenging.

Navigating between pages for data entry or retrieval was a puzzle, especially for new client-serving staff and program managers joining the organization. **Translating real-life data into the Salesforce data structure required a steep learning curve, leading to more extended periods of adjustment and potential errors in data entry, which in turn led to an increase in incomplete and inaccurate data.**

With attrition being high due to the nature of the role, training new hires proved to be a challenge as the complex navigation and user interface made onboarding a time-consuming process. This hindered the swift adoption of the system by fresh recruits.

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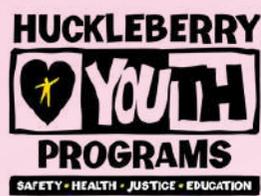
Huckleberry adopted the **Skuid** platform to accommodate for the shortcomings of the built-in Salesforce functionality, but this platform came with its challenges. It is non-native to Salesforce, and the design interface is complicated, requiring training and expertise to use. Maintaining Skuid pages was also complicated and time-consuming. It took a lot of work for the solo admin responsible for supporting the teams to respond to their changing needs and keep pages up to date.
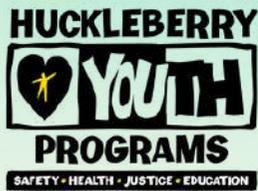
THE SOLUTION

➜ Migration to GridMate – a suite of Lightning components native to Salesforce.

➜ User-friendly and intuitive interface for faster onboarding.

➜ Customized grids to apply to the specific users and use cases, leading to easier adoption and more complete data entry.

➜ Streamlined workflow with Related Lists, Fieldset Grids, Parent Related List Grids, and Inline Editing.

The Salesforce Admin of Huckleberry Youth Program, Rachel Beach, transitioned from Skuid to GridMate, **introducing more advanced capabilities to Lightning pages for more accurate data capture.**
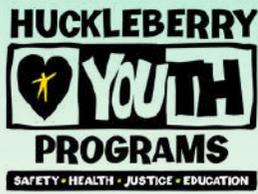
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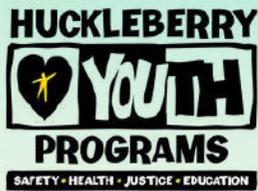
The ability to filter on related lists and features like color coding, custom field labels, and grouping has provided the team with a user-friendly interface for effortless data editing and reading. This enhanced the overall organization of information, thanks to easy lightning page customization made possible by GridMate.

Using the platform became a breeze for both tech-savvy and non-tech-savvy team members. The single-page design made it simple for everyone to get the hang of it, cut down on the number of interactions required to perform tasks, and eliminated the need to switch between screens. **Structured pages with inline editing helped users enter accurate data, making tasks easier for admins, managers, and case managers.**

Key components such as **Parent Related Lists Grids, Fieldset Grids, and Related Lists** have become essential to their operations, demonstrating the widespread utility of GridMate within their workflow. The Configuration Wiz feature played a significant role in overcoming the learning curve, ensuring that Rachel could quickly adapt to the platform, ultimately optimizing her efficiency.

The native integration of GridMate with Salesforce has significantly **simplified the overall management, integration process, and maintenance of pages** while maintaining the look and feel of Salesforce, making it a more straightforward and cohesive experience for the organization.
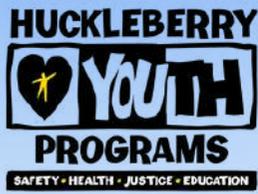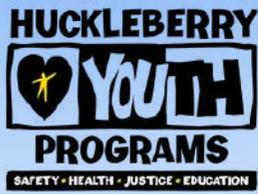
THE IMPACT

- ✓ Increased Data Integrity
- ✓ Reduced Support Requests
- ✓ Efficient Training and Onboarding
- ✓ Overall Productivity Boost

GridMates impact on the Huckleberry Youth Program has been nothing short of transformative, addressing specific challenges and ushering in positive changes across various fronts.

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Increased Data Integrity

Moving from the limitations of being unable to filter on related lists, the Huckleberry Youth Program experienced a substantial improvement in data accuracy with GridMate. **The transition to a single, user-friendly interface streamlined access to all data points that needed to be recorded, thereby significantly reducing the gaps in data.** As an administrator once burdened with tracing problematic data for reports, Rachel now saves valuable time, contributing to the heightened **reliability of data** recorded by users.

Reduction in Training and Onboarding Lead Time

GridMate's interface has markedly shortened the time spent training and onboarding new team members. The platform's look and feel of Salesforce enabled quick understanding and utilization without extensive training sessions. **This efficiency not only quickens the onboarding of new staff but also ensures a smoother transition for those less familiar with such platforms.**
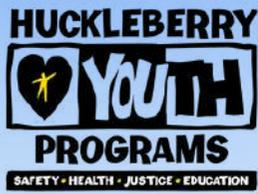
Reduction in Support Requests

GridMate's intuitive design and interface have notably reduced support requests from the team. The ease of entering data has streamlined utilization, eliminating common challenges that previously prompted inquiries for assistance from the admin. This reduction in support requests highlights GridMate's value proposition for admins and makes their lives easier by **simplifying day-to-day operations** for the Huckleberry Youth Program.

Overall Productivity Boost

Securing all data points within a single, accessible interface has resulted in a significant overall productivity boost for users. Team members now invest less time in data recording tasks and instead redirect their focus toward supporting the youth they serve. With data-related tasks streamlined, GridMate empowers the team to align efforts with their primary mission, ultimately **enhancing the organization's overall productivity and impact.**

"Using GridMate components on my Lightning pages has been a game changer. I can use the components to bring in the precise data I need across multiple objects and present it in a way that matches the user's needs exactly. It has opened up so many possibilities for enhancements to our interface. Now, when someone wants to be able to track data that we haven't tracked before, I am confident that I can make that happen for them."

Rachel Beach
Solo Salesforce #awesomeadmin
Huckleberry Youth Progrms
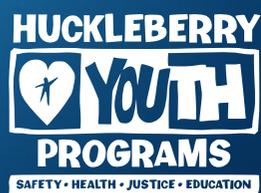
By replacing complex, non-native tools with GridMate's intuitive Lightning components, Huckleberry Youth Programs gained a streamlined, user-friendly Salesforce experience. The shift led to faster onboarding, fewer support requests, and significantly improved data accuracy. What was once a barrier to productivity is now a launchpad for impact, empowering staff to spend less time navigating systems and more time supporting the communities they serve.