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SUCCESS STORY

83% Faster Candidate Filtering:

How Montalt Partners Built Their Market View in Salesforce with GridMate

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Montalt Partners' recruiters knew exactly what they needed: one centralized view of their entire market, filterable on the fly, with full candidate context available without switching tabs. Salesforce's native list views couldn't deliver it. GridMate could. The workflow that used to take over an hour now takes 10 minutes, and the team operates from a single, admin-configured grid that puts everything they need on one screen.

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THE CUSTOMER

Montalt Partners is a specialist legal recruitment firm placing lawyers and legal professionals across the US market. The firm runs Salesforce Enterprise Cloud alongside Seven20, a recruitment-specific platform that GridMate partners with across a number of recruitment use cases. Managing a broad market of clients and candidates from a single environment, Montalt Partners depends on the ability to cut through data quickly and build targeted shortlists without friction.

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THE CHALLENGE

- No centralized view for managing clients and candidates in one place.
- Standard Salesforce list views capped at 2,000 records and 15 fields.
- Admins forced to build and maintain separate list views per user.
- Laborious filter changes slowing day-to-day recruiting workflows.

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- **The "My Market" View They Knew Worked:** Montalt Partners had worked at firms where an in-house development team had built a bespoke "my market" object inside Salesforce: a single view that let recruiters manage all their clients and candidates in one place, drill down by skill codes, contact recency, and location, and act on the results immediately. Replicating that in a standard Salesforce environment meant confronting the platform's native limitations head-on.

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- **Native List Views Hit Their Limits:** Salesforce list views cap out at 2,000 records and 15 visible fields. For a firm tracking a broad legal market across clients and candidates, that is not enough. And because list views cannot be configured centrally and pushed to users, Jonathan had to build and maintain separate views for each individual on the team. The setup created an ongoing admin burden and meant that any change to a view required manual effort across multiple user profiles.

- **Filtering Friction That Added Up:** Beyond the structural limits, the day-to-day experience of filtering was slow. Changing a filter, narrowing a list, moving from a broad market view to a targeted shortlist: each step required more clicks than it should, and the friction added up across every search the team ran.

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THE SOLUTION

- → Centralized "My Market" User Grid configured at admin level with per-user customization
- → Saved filters for segmenting the full market into distinct areas
- → Inline components for activity history, LinkedIn profiles, and CVs on a single screen
- → Related Lists component deployed across multiple objects
- → Self-sufficient post-implementation with minimal support dependency

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- **The Market View They Wanted, Without the Build:** GridMate gave Montalt Partners the centralized market view they had been trying to replicate, without any custom development. Jonathan configured a single "My Market" User Grid at the admin level, covering all contacts across clients and candidates, with saved filters that break the full market into distinct segments. Each recruiter can then apply their own customizations within that shared structure, without creating separate views or duplicating setup work.

- **Centralized Market View:** A single User Grid replaces the fragmented list view setup, removing the per-user configuration burden and giving the whole team a consistent starting point.

- **Saved Filters:** Jonathan has set up saved filters that segment the market by area, letting recruiters move quickly from a broad view to a targeted subset without manual filter changes each time.

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- **Inline Components:** Activity history, LinkedIn profiles, and candidate CVs are all surfaced directly within the grid. Recruiters have a 360-degree view of every contact on a single screen, with no need to switch tabs or open separate records.

- **Related Lists:** Beyond User Grids, the team uses GridMate's Related Lists component across several objects in their Salesforce environment, consolidating more of their workflow within the same interface.

- **Honest Scoping, Fast Implementation:** Implementation took two to three configuration sessions with GridMate's team. Jonathan valued the transparency throughout: an honest scoping of what the tool could and could not do meant there were no surprises after go-live. Post-implementation, he has been able to make adjustments independently, without raising support tickets for routine changes.

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THE IMPACT

- ✓ 83% faster candidate filtering, from over an hour to 10 minutes
- ✓ Single admin-configured market view replacing per-user list view setup
- ✓ 360-degree candidate view with activity history, LinkedIn, and CVs on one screen
- ✓ Post-implementation flexibility reducing ongoing support dependency

➤ **83% Faster Candidate Filtering:** The core shortlisting workflow, from full market view to targeted hot list and outreach, went from over an hour to 10 minutes.

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- **From Market View to Hot List:** The sharpest measure of GridMate's impact is in the workflow Montalt Partners' recruiters run most often. Starting from a broad market view, filtering down to a targeted hot list for a specific role by location, job title and skill codes, and then adding selected candidates to an outreach campaign used to take over an hour. It now takes around 10 minutes.

- **Admin Efficiency:** One centrally configured grid serves the whole team. Jonathan no longer needs to build or maintain individual list views for each user.

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- **Consolidated Candidate View:** Recruiters access activity history, LinkedIn profiles, and CVs without leaving the grid. Context is always available, and tab switching is eliminated.

- **Post-Implementation Independence:** The flexibility to make tweaks without raising support tickets has kept the setup lean and iteration fast.

- **An Improvement That Compounds:** The improvement in filtering time matters because it compounds. Every search the team runs benefits from it, and at recruiting pace, that adds up quickly.

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"The honesty around what could be achieved was the major thing for me. I didn't feel like there were gaps I wasn't aware of when we onboarded."

Jonathan Lalude
Montalt Partners



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Montalt Partners set out to replicate a capability that had previously required an in-house development team and a bespoke Salesforce build.

With GridMate, they got there without any custom development, in a handful of configuration sessions, and with a setup their admin can maintain and evolve independently. The market view their recruiters now work from is faster, fuller, and built to scale with the business.

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