



North Atlantic States Regional
COUNCIL of CARPENTERS

Industry - Consumer Business Services (Association)

Products Used - Sales Cloud
CRM Analytics
Communities Portal



Industry

Consumer Business Services (Association)

The North Atlantic States Regional Council of Carpenters (NASRCC) oversees and supports local unions representing over 30,000 carpenters, pile drivers, shop and mill men, millwrights, and floor covers working in Massachusetts, New York, Connecticut, Rhode Island, New Hampshire, Maine and Vermont.

Products Used



Sales Cloud



Communities Portal



CRM Analytics

Phase
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Challenge



After a less-than-ideal initial implementation, NASRCC engaged Gerent to conduct a health check, develop a long-term transformation roadmap, maximize user adoption, and help the Council and its members achieve meaningful ROI from their Salesforce investments.

Long-term partnership goals include:

- Auditing NASRCC's existing implementation
- Identifying and enacting strategic improvements to NASRCC's existing org configuration to maximize performance, enhance efficiency, reduce technical debt, and enable future scaling (e.g., functional expansion, additional users, etc.)
- Establishing a single source of truth for NASRCC data
- Developing (and executing) a roadmap for future goals, including funneling more information into Salesforce, improving reporting and search functionalities, incorporating features that could reduce "swivel-chairing" between systems, streamlining day-to-day processes, and building a user portal
- Enacting a change management plan to drive enthusiasm and ensure employee adoption

Value Delivered



During this initial engagement, Gerent worked closely with NASRCC stakeholders to develop a keen understanding of the Council's existing org and processes. We:

- Conducted discovery sessions with key stakeholders
- Performed a deep audit of the existing org to evaluate NASRCC's existing data model architecture, field usage, user adoption, and additional factors to develop a comprehensive understanding of the Council's org and its (mis)alignment with discussed business requirements
- Provided actionable recommendations on how NASRCC might improve its org
- Developed a roadmap to plan strategic org improvements that will add valuable functionality and set a scalable foundation for Salesforce success
- Clearly defined the tasks and effort associated with each recommendation, as well as the potential value those recommendations would provide. This articulation will help drive user enthusiasm and adoption.

Results



Post-project, NASRCC has gained a better understanding of its org's potential, an actionable roadmap for meaningful change, and — most critically — a partner it can count on. In upcoming phases, we plan to:

- Integrate additional databases to bring more relevant data into Salesforce
- Transition accounting operations into Salesforce to decrease swivel-chairing between systems and reliance on Excel spreadsheets
- Establish the solution(s) and integrations required to facilitate certified payroll tracking for government projects
- Provide ongoing training and support to internal users + external contractors