INDUSTRY | EDUCATION NONPROFIT (MEMBER ASSOCIATION)

ORCID

ORCID is an international, interdisciplinary, non-proprietary nonprofit created by the research community to serve its stakeholders and organizations supporting the research ecosystem.

Challenge

ORCID aimed to optimize and scale its Sales Cloud platform to enhance membership management, drive organizational efficiency, and secure a proper foundation for future growth. Pre-project, ORCID faced challenges such as:

- Limited scalability and visibility. ORCID's existing system was not set up to handle its fast-growing (2x) Consortium Membership volume; the nonprofit lacked crucial visibility into product adaptation, sales operations, and its membership base. This lapse hindered operations, undermined accurate reporting, and inhibited growth.
- Reliance on custom solutions. ORCID's tech stack relied heavily on custom code and third-party tools, creating inefficiencies in membership management and related processes.
- Process inefficiency and complexity. Manual processes, extensive cross-checks, and spot checks made member management inefficient, time-consuming, and prone to errors.

Solution

We empowered ORCID by standardizing its Sales Cloud functionality, upgrading to Salesforce Flow, and transitioning to declarative configuration. This initiative simplified their tech stack, minimized technical debt, streamlined processes, and paved the way for future growth.

- Migrated to standard Products & Price Books
- Replaced custom code with Flow automations + moved key fields to Flow
- Updated + enhanced Member Selector (a custom component)
- Automated ORCID's lost-renewal processes

Outcome

By the end of the project, Orcid could:

- Improve efficiency for staff and members
- Reduce technical debt
- Increase system scalability to support future growth
- Enhance system flexibility