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Innovative Intakes for Make the Road New York

Make the Road New York (MRNY) is a non-profit organization that builds the power of immigrant and working-class communities to achieve dignity and justice.

MRNY's model incorporates fundamental strategies that assist community objectives. These objectives include policy innovation, community organizing, and transformative education accompanied by supplying legal and survival services.

MAKE THE ROAD NEW YORK

Industry	Customer since	Products	Features
Non Profit	2019	Forms, Docs	Document Automation, Project Workflows

Confronting and Tackling Challenges Head On

One major challenge in MRNY's process was that lawyers and health case managers needed to track data across various objects in Salesforce during the intake phase. English is often a second or third language for many of MRNY's staff, so the new intake process needed to be as simple as possible in Salesforce.

After using Salesforce for over a decade, MRNY decided it was time for an overhaul to its workflows.

Creating Powerful Salesforce Inspired Web Applications

As a non-profit organization with low overheads, MRNY had never come close to hiring a Salesforce developer. After searching far and wide, Titan was the only zero-code solution MRNY found to build technical, complex and team-specific intake processes.

The new MRNY system with Titan allows intake forms to populate information already in Salesforce, saving hours of frustrating data entry each week! MRNY staff can now spend their valuable time helping clients. For the first time ever, MRNY was able to attain an automated and customized intake process.

Exclusive Results with Titan

Titan Integrates Effectively with Salesforce
Titan is 100% integrated into Salesforce with a unique bi-directional data feature that has made MRNY's solutions a reality.

Successful Data Tracking
Titan has helped MRNY track the progress of documents and forms across the entire organization.
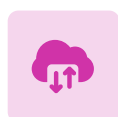
Up-skill staff with an Easy User-Interface
Titan provided MRNY with a simple interface to allow members to work with forms and documents easily in just a few clicks.

100% No-code, Just Clicks Platform
Titan provided MRNY with a code-free application to effectively build a scalable organizational workflow process to connect staff and members.

Tailor-Made Document and Form Generation
MRNY can now generate documents and forms with real-time bi-directional data that is automatically pushed and pulled from Salesforce.

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