

Yeadim Northern Goals Replaced Manual Paperwork With Digital Solutions For Salesforce

 **Industry:** Nonprofit  **Customer Since:** 2019  **Products:** Enterprise Suite  **Features:** Forms, Automation, Doc Gen, eSignatures

COMPANY BACKGROUND

[Yeadim](#) Northern Goals and Merkaz Ma'ase operate under Keren Rashi Foundation, a philanthropic organization overseeing [nine nonprofit entities](#) across Israel. Together, they deliver community programs for children and adults, focused on expanding equal opportunities.

THE CHALLENGE

Across both nonprofits, operations depend on [managing large volumes of information](#). Paper-based processes slowed down operations and introduced [administrative overhead](#). Workflows relied on forms and manual handling for parental consents, confidentiality waivers, registrations, clinical documentation, and employee evaluations. Data reached Salesforce late or was incomplete, making it [difficult to scale programs](#).

They needed one thing: a way to replace paperwork with automated, secure workflows that move data directly into Salesforce.

TITAN'S SOLUTION

Yeadim Northern Goals and Merkaz Ma'ase adopted Titan.

Early use cases focused on developmental units, where therapists completed forms and clinical documents through Titan. Data flowed directly into Salesforce, and employees generated signed PDFs with a single click.

Today, Titan's Experience Studio is used across [five environments](#) to run workflows, external provider submissions, trainee portals, and employee evaluations in Salesforce.



KEY RESULTS

- ✓ **Manual Paperwork Replaced:** Intake, clinical documents, consents, HR onboarding, and evaluations now run digitally in Salesforce.
- ✓ **Data Captured at the Source:** Staff and external providers submit information directly into Salesforce.

- ✓ **External Providers Without Salesforce Access:** Secure data submission without Salesforce licenses or CRM exposure.
- ✓ **Tool Consolidation:** Forms, eSignatures, documents, and portals run on a single platform.
- ✓ **Faster Salesforce Delivery:** Workflows and portals can be built and updated without long implementation cycles.

“The combination of intuitive tooling, responsive support, and a roadmap that listens to customers is what keeps us building more on Titan.” Sarig Wohlstein, Information Systems Manager