240x Faster Survey Prep At Ben Franklin Northeast

Industry: Nonprofit

Customer Since: 2021

Products: Enterprise Suite

Features: Document Generation, Forms, Portals

BACKGROUND

Ben Franklin Northeast is a nonprofit organization that helps Pennsylvania businesses grow.

By providing early-stage technology companies and established manufacturers with access to capital, expertise, and connections, the organization helps businesses launch, grow, and compete. Its work has supported job creation and retention, advanced new technologies, and strengthened the region's economy.

BEN FRANKLIN NORTHEAST'S CHALLENGE

Ben Franklin Northeast reports funding, matching investments, and outcomes like jobs created and R&D spending to the state.

Migrating from SQL Server to Salesforce, it needed to preserve one-page project summaries.

For 30+ years, 160 seven-page surveys were mailed, scanned, and hand-keyed, later becoming fillable PDFs with skipped questions and slow client returns.

It needed affordable Salesforce grant reporting, web forms, and documents matching board formats.



"Titan was honestly a lifesaver. The software was really quick to use, and we could design all of our forms in Word." - Sara Breisch, Business Analyst at Ben Franklin Technology Partners of Northeastern Pennsylvania.

TITAN'S SOLUTION

Ben Franklin Northeast uses Titan Enterprise Suite to collect annual impact data from clients inside Salesforce, give clients secure access to their information, and generate documents using Salesforce data.

Solution	Description
Salesforce Web Forms	Ben Franklin Northeast uses a Salesforce web form for nonprofits to collect annual impact data. Clients receive a multi-step form in Salesforce with web forms with conditional questions and required fields on a Salesforce web form to prevent skipped questions. They can save their progress and return later, while submitted forms can be reopened for corrections. Responses update Salesforce automatically, eliminating manual data entry.
Secure Salesforce Client Portal	The secure Salesforce client portal uses SmartV authentication and a portal login with emailed verification code to give clients secure access to their survey history. Clients can review previous responses and update information through a form that updates Account and Contact records in Salesforce, along with a custom object.
Salesforce Doc Gen	The team uses Salesforce document generation from Word templates to create board reports while preserving familiar layouts. Using Word templates with Salesforce fields, employees can generate documents from a Salesforce Opportunity with a button, based on their permissions. Around 12 documents are available, including a report that combines budget and Project s/b Summary Report (PSR) data from two Salesforce objects for state reporting and client contracts.
Leadership Reporting	The marketing team uses Titan to generate investment summaries, letters, and flashcards for state legislators. Before meetings, the CEO can access up-to-date figures pulled directly from Salesforce, without manually preparing reports.
Self-Service Reporting	Employees can generate budget reports, risk score pages, and other documents from Salesforce Opportunities using Titan's document library, without relying on colleagues to prepare them.

KEY RESULTS

- **240x Faster Survey Prep:** Preparing the Annual Impact survey previously took 120 hours. With Titan, the team expects future preparation to take just 30 minutes, a projected 240x improvement.

- **160+ Surveys Sent in 15 Minutes:** The team sends more than 160 survey emails in approximately 15 minutes, with completed responses flowing directly into Salesforce without manual data entry.

- **Weekly Survey Reviews Down to 1 Hour:** Reviewing submissions previously took a full workday each week. Now, the team spends about one hour checking for issues, such as incorrect values.

- **50% Less Time to Complete Surveys:** Clients previously spent an estimated four hours completing the survey, compared to two hours now. Those with their information ready can finish in as little as 30 minutes.

- **83% Less Report Prep Time:** Preparing client reports now takes roughly 15 minutes, down from approximately 90 minutes with the previous process.

- **Clean Salesforce Data:** Required fields help prevent incomplete submissions, while client responses update Salesforce without manual retyping.

- **Secure Access to Historical Data:** Email verification gives clients secure access to previous survey responses, supporting state reporting requirements.

- **Familiar Document Formats Preserved:** The team generates documents using Salesforce data while keeping the Word layouts its board already knows.

> *"It's invaluable to us now because we save a ton of time. If I can think of a Salesforce project, I'll figure out a way to do it in Titan!" - Sara Breisch, Business Analyst at Ben Franklin Technology Partners of Northeastern Pennsylvania.*