Hat-Trick Consulting

Success Story

How Hat-Trick Consulting Help Their Salesforce Clients Improve Documentation and Boost Efficiency with Elements

Inadequate documentation is a common problem in the Salesforce ecosystem, and Hat-Trick Consulting's clients were no exception. The company struggled working with new clients that had no documentation for their Salesforce org, resulting in slower project timelines and inefficiencies. Often the only documentation is files attached to cases, which made it difficult to find specific information and created confusion.

Aaron Crear

Salesforce Architect & Founder

Hat-Trick Consulting

> " Being able to look at tech debt from a high level and understand what is really no longer being used...helps clean up orgs.

Aaron Crear, Founder

Hat-Trick Consulting implemented Elements.cloud, a Change Intelligence Platform, to get complete visibility into their clients' Salesforce orgs. It creates a metadata dictionary with system-generated documentation and analysis.

When Aaron, the founder of Hat-Trick Consulting, starts a new project he will always run Elements through that org,

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❝ It gives us an idea of how complex it is, what technical debt might be there, and it's a really useful tool as a consultant, because it helps me scope that project and actually price it based on the complexity of it. The impact analysis is a great visualization and really helps with that.

What really attracted him to Elements was being able to see that documentation in Salesforce Setup for any metadata item, and not have to go look at a case or a Jira ticket and try and figure out where that documentation lives.

Aaron summarized the benefits as being able to see the complete change history of who requested this change, what was done, who approved it, having that all right there takes out the "he said, she said" completely out of any build. It's invaluable

❝ I go to customer orgs that I may not have touched for six months and go back, and they ask to build something, I'm not going to remember what I built six months ago, let alone what somebody else did three years ago, so having that all sit right inside of the metadata is huge.

Hat-Trick Consulting uses the Elements platform to connect to multiple orgs and track metadata throughout the progression of environments, giving them a high-level understanding of the technical debt within an org, and giving the consulting team the ability to declutter customer orgs.

Aaron Crear states, "being able to look at tech debt from a high level and understand what is really no longer being used...helps clean up orgs." Access to all the business analysis and org analysis in one place is a huge benefit.

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Using Elements saves Hat-Trick Consulting a significant amount of time and allows the company to provide a better service to their Salesforce clients. According to Aaron, "one of the metrics that I just use is flat-out time savings...I can get all of that in a few hours."

❝ Being able to do all of that within one platform as opposed to a bunch of separate tools is a really key element for me. No pun intended.

Conclusion

Overall, Elements helps Hat-Trick Consulting improve its workflows, increase efficiency, and provide better service to its Salesforce clients. By implementing Elements, the company became a more organized, efficient, and effective consultancy.

Talk to us

If you're struggling with understanding your own or your clients' Salesforce implementations, talk to us to find out how we can also help streamline your Salesforce implementation and ensure success.

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