

SALESFORCE CASE STUDY

Everblue × Modeverse

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ABOUT EVERBLUE

Everblue provides operational software and program management services to government agencies and nonprofits, helping them run rebate, grant, license, exam, case, claim, and permit programs without the manual overhead that typically slows public-sector work. Its client roster spans state energy offices, departments, and federal agencies delivering programs such as IRA Home Energy Rebates, Solar for All, and the Weatherization Assistance Program, alongside program implementation and workforce development services.

THE CHALLENGE

Every program Everblue supports comes with its own application process, eligibility rules, review steps, and reporting requirements, and Everblue often runs several of these programs for a single agency at once. As its client base and program portfolio grew, tracking applicants, rebate and grant disbursements, and workforce training enrollments across programs became harder to manage consistently, and agency stakeholders needed clear, defensible reporting on how public funds were being applied and where applications stood at any given moment.

THE SOLUTION

Modeverse partnered with Everblue to bring program intake, review, and reporting onto a single Salesforce foundation built for public-sector accountability. The engagement included:

- A unified applicant and case record in Salesforce, tracking eligibility status, application stage, and disbursement history across rebate, grant, license, and permit programs in one place.
- Automated intake and review workflows, so applications move through eligibility checks and approvals on a consistent, auditable path instead of manual case-by-case handling.
- A structured claim and rebate management process, giving program staff a clear view of funds committed, disbursed, and remaining across programs like IRA Home Energy Rebates and Solar for All.
- Workforce development tracking that connects training enrollment and completion records to the programs they support, giving Everblue visibility into program readiness alongside applicant demand.
- Agency-facing reporting dashboards giving Everblue's government and nonprofit clients real-time, defensible visibility into program performance and fund utilization.

THE RESULTS

With Salesforce connecting intake, review, and reporting, Everblue's team now runs rebate, grant, license, and permit programs from a single operational foundation instead of program-by-program manual tracking. Applications move through review on a consistent, auditable path, program staff can see fund commitments and disbursements in real time, and agency clients get the clear, defensible reporting their public programs require. The result is a platform built to keep pace as Everblue takes on more programs across more agencies without losing accountability on any single one.



> ***"Public dollars need a paper trail as strong as the programs they fund. Our systems had to be built for that from the ground up."***

The idea behind Everblue's Salesforce-powered program delivery

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ABOUT MODEVERSE

Modeverse is a Salesforce consulting agency helping companies and organizations design, build, and optimize Salesforce environments that fit the way they actually work, from Sales Cloud and Service Cloud to Experience Cloud and custom integrations. We partner with our clients from strategy through implementation and ongoing support.

Want to see what Salesforce could do for your organization? Get in touch with Modeverse to start the conversation.