

SALESFORCE CASE STUDY

UNCDF × Modeverse

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ConnectingSalesforcetotheSystemsBehind Global Development Finance

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ABOUT UNCDF

The United Nations Capital Development Fund (UNCDF) is the UN's investment agency for the world's least developed countries, working to expand financial inclusion, mobilize capital for local development, and advance inclusive digital economies. UNCDF partners with governments, financial service providers, and the private sector to deliver programs across dozens of countries, coordinating funding, technical assistance, and partner relationships at global scale.

THE CHALLENGE

Running development finance programs across many countries and partners meant UNCDF's teams depended on a wide range of external systems and manual processes for donor records, program data, and stakeholder communication, alongside Salesforce as the operational hub for managing relationships and initiatives. Manual workflows slowed approvals and reviews, donor information lived across scattered records instead of one system, and international stakeholders needed secure, real-time ways to communicate, sign off on documents, and stay informed as programs moved forward.

THE SOLUTION

Modeverse's founder led the Salesforce work at UNCDF, designing and building custom applications, automation, and integrations to support the organization's digital transformation. The engagement included:

- Custom Salesforce applications built with Custom Objects, Fields, and Page Layouts to support UNCDF's broader digital transformation initiatives.
- Manual workflows optimized with Flow Builder, cutting process time by 40% and improving day-to-day operational efficiency across the platform.
- Optimized reports and dashboards giving executives clear, reliable visibility into CRM processes and data integrity across the organization.
- User management built around Profiles and Permission Sets, giving global program teams secure, appropriately scoped data access for international stakeholders.
- A Donor Management System architected within Salesforce to centralize donor records, streamline engagement tracking, and improve reporting accuracy across global programs.
- Multi-level Approval Processes designed and automated to standardize review and sign-off workflows, reducing turnaround time and increasing governance across departments.

- A WhatsApp integration via Twilio enabling real-time, two-way stakeholder communication and automated notifications directly within Salesforce.
- DocuSign set up and installed as a third-party e-signature application, enabling secure digital document signing and approvals for UNCDF.

THERESULTS

With custom applications, automation, and integrations built into a single Salesforce foundation, UNCDF's teams cut manual workflow time by 40%, gained a centralized donor management system with accurate, reliable reporting, and moved approvals through standardized, governed processes instead of ad hoc sign-off. Real-time WhatsApp communication and secure DocuSign signing brought international stakeholders directly into the platform, and executives gained clear, dashboard-level visibility into CRM processes across the organization.

40%	*Centralized*	*Automated*
Faster Workflows	Donor Management	Approvals & Signatures

> ***"Cutting 40% off manual workflow time wasn't about one fix. It was custom objects, automated approvals, and integrations all pulling in the same direction."***

The idea behind UNCDF's Salesforce integration work

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, integrations, and ongoing administration. 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.