Alcumus

CASE STUDY

The Client

This client is a technology-driven service provider offering a wide range of risk management solutions across many industries, and contractor and supplier networks with the goal of helping their clients create safe and effective workplaces. Through scalable technology and expertise, they enable the digitization of supply chain, contractor, and accreditation management.

The Problem

This client offers several digitized and automated platform-as-a-service products. One of their platforms aims to connect networks of accredited, reliable contractors with individual and commercial clients seeking their services within a single portal.

Contractor accreditation verification processes are incredibly complex due to the fragmented and disjointed nature of contractor skill certification, health & safety accreditation requirements, and governance across multiple jurisdictions, regulatory frameworks, disciplines, and industries.

The platform allows contractors to go through the accreditation verification process by gathering and uploading required documentation such as workplace safety certifications, insurance, licenses, etc. Through their internal verification of submitted documents, contractors strive to obtain a 'checkmark' on the platform to signify their full accreditation and ability to be hired and paid. The platform serves as the central hub for clients to complete searches for contractors best suited for their job, identify, hire and communicate directly with their chosen contractor, and manage everything from logging, payments, and reviews directly through the portal.

One of the major hurdles to overcome is geographical locations and industries have no standard guidelines for accreditation requirements across all regions. There is no single repository through which all the relevant information and documentation from numerous governments and accreditation providers can be verified. Instead, they're fragmented and don't easily allow for verification processes to be streamlined due to the lack of communication and integration with neighboring regions, adjacent government bodies, regulators, etc. Contractors and clients sometimes lack the technical know-how to locate the necessary documents. They were often uploaded incorrectly or incomplete, which created a mess of non-uniform data and documents.

Due to the challenges inherent to the legacy nature of the industry, this client approached MAC with a costly, time-consuming set of contractor verification processes that were being completed manually by large teams of verification specialists. There was also the issue of continuously tracking and communicating with contractors to keep their accreditation status up-to-date, as well as a need to develop and streamline their internal CI/CD (continuous integration and continuous deployment) processes to ensure platform development and code repositories could be easily managed and maintained through multiple and ongoing development cycles.

The Solution

The task of creating an efficient platform, which not only served its client user network with a complete, up-to-date, filtered database of fully certified contractors, but also implemented an automated contractor accreditation verification process directly within the platform itself, was one that our CRM team was very well-suited to design and implement within the client's existing Salesforce instance.

Our solution leveraged the power of Salesforce Community Cloud to combine client and contractor communities into a single portal that can service the unique needs of both groups.

Since the primary bottleneck in the platform was within the contractor accreditation process, our customized solution enabled the platform to automatically acquire the necessary, up-to-date accreditation documents required by the verification process from the government/provider's website for each contractor. Our team accomplished this by writing customized Python scripts to pull the required documentation from their respective websites, and log them into the Salesforce document verification process.

A key issue during the development of the platform was that the contractor accreditation and certifications could expire in the midst of running contracts, which would render the affected contractors unable to receive payment for their services until all accreditations were up-to-date. Our solution included the development of tracking and notification features within the platform to ensure contractors kept certifications and accreditations updated and renewed annually across their various disciplines.

We were able to completely redesign the client's CI/CD processes by leveraging the Salesforce-AutoRABIT integration to make their process of collaborative code development and deployment more manageable and organized.

The Outcome

The improved platform has now alleviated much of the work previously required of contractors throughout the verification process by automatically acquiring the required accreditation documents directly from their respective websites, potentially saving each contractor several hours of work.

We streamlined and automated the entire accreditation document verification process by implementing automated checks of submitted documents, eliminating hundreds of hours previously spent by verification specialists.

Milestones / Key Highlights

- Automated the acquisition of accreditation documents so that documents could be received in a complete and timely manner while saving the end-user much time and effort.
- Automated the verification of acquired documents and alleviated the majority of manual efforts by verifiers.
- Automated the tracking and notifications of accreditations, expirations, and upcoming renewals.
- Developed robust code repository maintenance and CI/CD processes to keep continuous development seamless and efficient.