

Delivering Dreams For A Lifetime

Multi-Phase Salesforce
Transformation Journey





Laying the Foundation for Operational Excellence

Vermont Surrogacy Network (VSN), a highly respected player in the healthcare sector specializing in surrogacy services, faced challenges managing their rapidly growing operations. With an expanding network of intended parents, surrogates, and healthcare professionals, VSN needed a more robust and centralized system to handle sensitive data, streamline communication, and improve case management.

Their existing system relied heavily on manual data entry and fragmented communication, which created inefficiencies, delayed responses, and put the integrity of client data at risk.

Phase 1 – 2019

Centralizing communications and automating workflows

Recognizing these operational bottlenecks, VSN engaged DTC Force in 2019 to implement Salesforce as a core solution. The goal was to create a centralized CRM that could store and manage all client communications, case files, and data within a secure environment. DTC Force developed a custom Salesforce Communication System, enabling private, secure chat functionality between intended parents and surrogates, with all interactions tracked and logged automatically within Salesforce. This chat system improved accountability, transparency, and documentation while ensuring the integrity and confidentiality of all communication.

The system was tested rigorously within a sandbox environment before going live, ensuring a smooth deployment without disrupting ongoing operations. This foundational implementation significantly improved VSN's operational efficiency, laying the groundwork for the organization's future growth. With this newly centralized system, VSN could easily track each surrogacy case, from initial inquiry to the final stages of the surrogacy process, allowing their team to focus on delivering exceptional care and service.



Phase 2 - 2021

Expanding Capabilities with Ongoing Support

By 2021, VSN's operations had expanded, and they required ongoing support to maintain the efficiency of their Salesforce platform. The focus this time was on Salesforce Support Services, ensuring that all existing functionality was upheld while expanding the capacity for handling increasing case volume. DTC Force provided a Managed Support Agreement, allowing VSN's team to submit cases via phone or web, which were then categorized based on severity level and addressed accordingly.

DTC Force also helped refine VSN's use of Salesforce by offering admin support, training, and troubleshooting services for complex issues. This phase included the establishment of designated contacts who acted as liaisons between VSN and DTC Force to streamline the support process. The result was enhanced system stability and the ability to quickly address any technical issues that arose as the organization continued to grow.



A man with a beard, wearing a white t-shirt and tan pants, is holding a baby in a grey onesie. They are in a nursery setting with a white crib in the foreground and dried pampas grass in the background. The background wall is a dark grey color.

Phase 3 - 2022

Optimizing Operations with Managed Services

In 2022, VSN sought to further optimize their operations by transitioning to a more comprehensive Managed Services Agreement. This phase focused on ensuring that all aspects of Salesforce were running smoothly while introducing additional capabilities to meet VSN's evolving needs. DTC Force worked to automate processes related to customer management, approval workflows, and custom reporting to give VSN's team better control over day-to-day operations.

Key improvements included the creation of advanced custom fields for tracking surrogacy case details, setting up approval processes for sensitive information, and refining the case management workflow to handle increased demand. The new agreement provided proactive monitoring and continued support to ensure that VSN's Salesforce system remained responsive and adaptable to their growing operations. This comprehensive solution offered improved scalability, enabling VSN to efficiently manage their increasing client base without compromising the quality of their services.

Enhanced Communication and Case Management Solutions

Across all three phases of DTC Force's engagement with VSN, a key focus was improving the quality of communication and client engagement. The 2019 implementation of a secure private chat system laid the foundation for efficient client communication. As the surrogacy cases became more complex, the introduction of case escalation processes and automated notifications in 2021 ensured that the right team members were always informed and could take action swiftly.

The 2022 enhancements continued this trajectory by integrating custom workflows that automatically assigned tasks and responsibilities to team members based on specific case stages. This eliminated the need for manual task delegation and ensured that no case or client fell through the cracks. The result was not only improved operational efficiency but also an enhanced experience for surrogates and intended parents, who could rely on timely updates and consistent communication throughout the surrogacy journey.



A silhouette of a woman lifting a child into the air against a bright sunset background. The sun is low on the horizon, creating a strong glow and reflecting on the water below. The woman is on the left, and the child is in the center, both in dark silhouette against the bright orange and yellow sky.

Looking ahead

A Future Built on Salesforce Scalability

Thanks to the phased, multi-year partnership between Vermont Surrogacy Network and DTC Force, VSN now operates with a highly efficient, scalable Salesforce system that supports their mission of facilitating meaningful surrogacy journeys. From the foundational 2019 implementation that centralized communication and case management to the 2021 and 2022 upgrades that introduced automation, proactive support, and custom reporting, VSN has successfully transformed its operational capabilities.

The Salesforce platform not only addresses VSN's immediate needs but also provides a future-proofed foundation that can adapt to the organization's growing demands. As VSN continues to scale, they can rely on DTC Force's ongoing support and the flexibility of their Salesforce infrastructure to maintain their commitment to excellence in surrogacy services.

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