

Customer Engagement & Solution Design Dashboard (Salesforce)

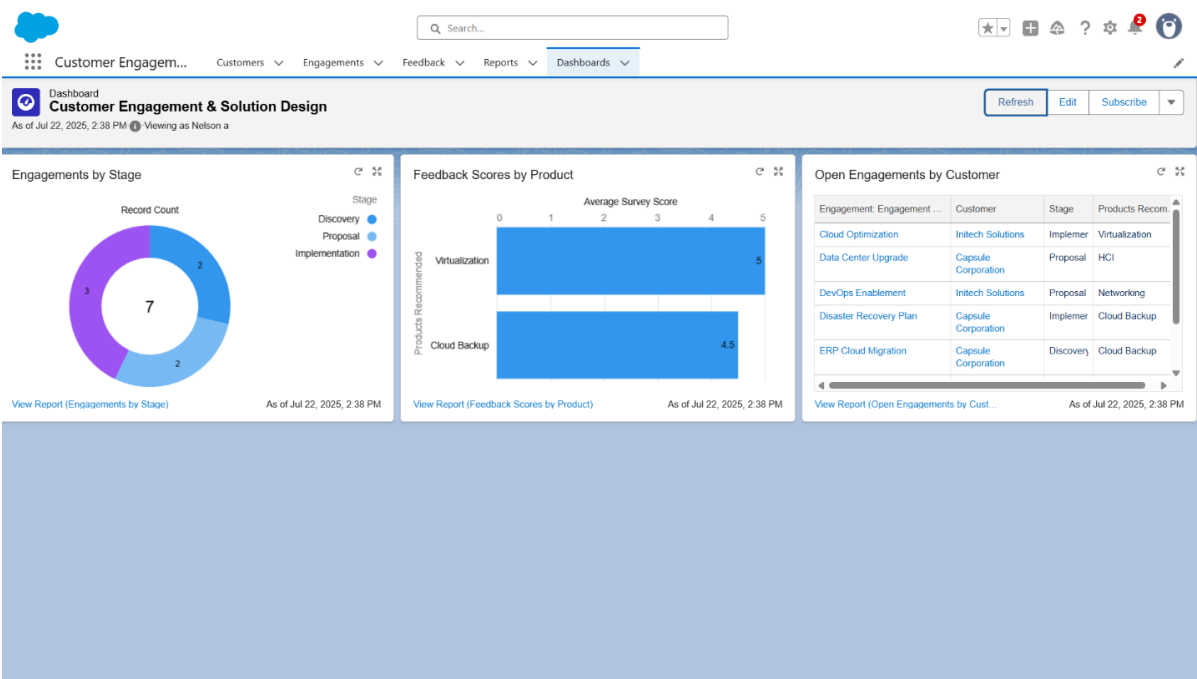
A Salesforce Lightning Dashboard and Automation

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Introduction

This project showcases a Customer Engagement & Solution Design Dashboard built in Salesforce Lightning to address a common business challenge: lack of centralized visibility into customer engagement lifecycles and feedback. In this scenario, I've created a tech services organization that struggles to track Engagement stages, recommended solutions, and post-implementation feedback, leading to inefficiency and inconsistent data. I designed and implemented a solution using custom objects (Customer, Engagement, Feedback), configured their relationships, and built a record-triggered Flow that automatically creates Feedback records when an Engagement reaches the Implementation stage. I also developed key reports and a Lightning dashboard summarizing Engagements by Stage, average Feedback Scores by Product, and Open Engagements by Customer, delivering actionable insights and improving operational efficiency.

Dashboard




This is a Salesforce Lightning dashboard created using reports that display Engagements by Stage, average Feedback Scores by Product, and Open Engagements by Customer.

Reports

The report, titled "Engagements by Stage", provides a detailed view of engagement records, categorized by stage. The report includes a table with columns for Stage, Engagement Name, Customer, and Products Recommended. The data is grouped by stage, with subtotals for each group.

Stage	Engagement Name	Customer	Products Recommended
Discovery (2)	ERP Cloud Migration	Capsule Corporation	Cloud Backup
	Security Modernization	Globex Financial Services	Virtualization
Subtotal			
Proposal (2)	Data Center Upgrade	Capsule Corporation	HCI
	DevOps Enablement	Intech Solutions	Networking
Subtotal			
Implementation (3)	Cloud Optimization	Intech Solutions	Virtualization
	Disaster Recovery Plan	Capsule Corporation	Cloud Backup
	Hybrid Cloud Expansion	Globex Financial Services	Cloud Backup
Subtotal			
Total (7)			

Report summarizing Engagements grouped by Stage, used for the dashboard’s pie chart.



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Customer Engagem...


Customers

Engagements

Feedback

Reports

Dashboards



Report: Engagements with Feedback

Feedback Scores by Product

Enable Field Editing

🔍

Add Chart

▼

🔄

Edit

Total Records

3

Average Survey Score

5

<input type="checkbox"/> Products Recommended ↑	Engagement Name	Customer: Customer Name	Survey Score	Comments
<input type="checkbox"/> Virtualization (1)	Cloud Optimization	Intech Solutions	5	Achieved cost savings as expected.
Subtotal			Avg: 5	
<input type="checkbox"/> Cloud Backup (2)	Hybrid Cloud Expansion	Globex Financial Services	5	Very smooth implementation process.
	Hybrid Cloud Expansion	Globex Financial Services	4	Good overall, minor delays.
Subtotal			Avg: 5	
Total (3)			Avg: 5	


Row Counts

Detail Rows

Subtotals

Grand Total

Report showing average Feedback Scores grouped by Products Recommended, used for the dashboard’s bar chart.



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Customer Engagem...


Customers

Engagements

Feedback

Reports

Dashboards



Report: Engagements

Open Engagements by Customer

all open engagements with the customers included

Enable Field Editing

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Add Chart

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Edit

Total Records

7

	Engagement: Engagement Name	Customer	Stage	Products Recommended
1	Cloud Optimization	Intech Solutions	Implementation	Virtualization
2	Data Center Upgrade	Capsule Corporation	Proposal	HCI
3	Disaster Recovery Plan	Capsule Corporation	Implementation	Cloud Backup
4	DevOps Enablement	Intech Solutions	Proposal	Networking
5	Hybrid Cloud Expansion	Globex Financial Services	Implementation	Cloud Backup
6	ERP Cloud Migration	Capsule Corporation	Discovery	Cloud Backup
7	Security Modernization	Globex Financial Services	Discovery	Virtualization

Report listing open Engagements by Customer, used for the dashboard’s table component.

Custom Objects

Setup

Home

Object Manager

Search Setup

Object Manager

52 Items, Sorted by Last Modified

Quick Find

Schema Builder

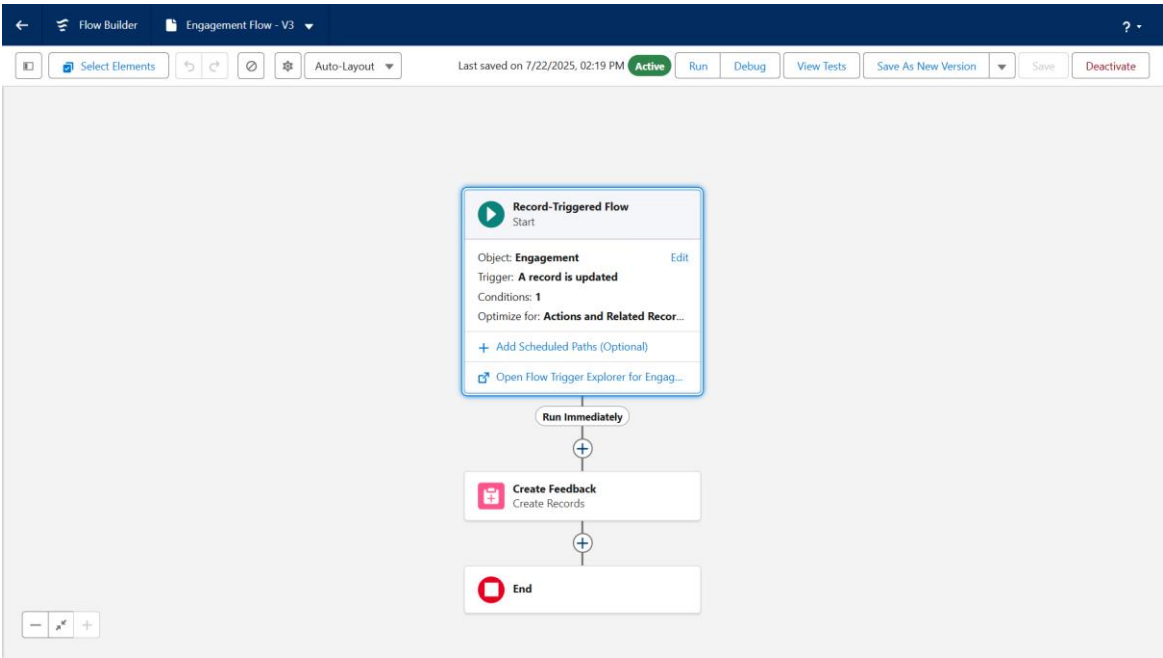
Create

Label	API Name	Type	Description	Last Modified	Deployed
Feedback	Feedback_c	Custom Object		7/17/2025	✓
Engagement	Engagement__c	Custom Object		7/17/2025	✓
Customer	Customer__c	Custom Object		7/17/2025	✓
Work Type Group Member	WorkTypeGroupMember	Standard Object			
Work Type Group	WorkTypeGroup	Standard Object			
Work Type	WorkType	Standard Object			
Work Step Template	WorkStepTemplate	Standard Object			
Work Step	WorkStep	Standard Object			
Work Plan Template Entry	WorkPlanTemplateEntry	Standard Object			
Work Plan Template	WorkPlanTemplate	Standard Object			
Work Plan	WorkPlan	Standard Object			
Work Order Line Item	WorkOrderLineItem	Standard Object			
Work Order	WorkOrder	Standard Object			
Web Store Inventory Source	WebStoreInventorySource	Standard Object			

For
this
app,
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created three custom objects to model Customer engagement and Feedback processes.

Flow



Record-Triggered Flow that automatically creates a Feedback record whenever an Engagement enters the Implementation stage.

Sample Records

The screenshot shows a web application interface for Customer Engagement. At the top, there is a search bar and navigation tabs: Customers, Engagements, Feedback, Reports, and Dashboards. The 'Customers' tab is selected, and the record for 'Capsule Corporation' is displayed. The record has buttons for 'New Contact', 'Edit', and 'New Opportunity'. The 'Related' section is active, showing 'Notes & Attachments (0)' and 'Engagements (3)'. The 'Engagements' list includes 'Data Center Upgrade', 'Disaster Recovery Plan', and 'ERP Cloud Migration'.

Customer Engagement System

Search...

Customers Engagements Feedback Reports Dashboards

Customer: Capsule Corporation

New Contact Edit New Opportunity

Related Details

Notes & Attachments (0) Upload Files

Upload Files

Or drop files

Engagements (3) New

Engagement Name

Data Center Upgrade

Disaster Recovery Plan

ERP Cloud Migration

View All

Sample customer record with relationships to their engagements.

The screenshot shows the same web application interface, but with the 'Engagements' tab selected. The record for 'Cloud Optimization' is displayed. The record has buttons for 'New Contact', 'Edit', and 'New Opportunity'. The 'Related' section is active, showing 'Notes & Attachments (0)' and 'Feedback (1)'. The 'Feedback' list includes 'Cloud Optimization'.

Customer Engagement System

Search...

Customers Engagements Feedback Reports Dashboards

Engagement: Cloud Optimization

New Contact Edit New Opportunity

Related Details

Notes & Attachments (0) Upload Files

Upload Files

Or drop files


Feedback (1) New

Feedback Name

Cloud Optimization

View All

Sample engagement record and its relationship to its feedback.



Customer Engagem...

CustomersEngagementsFeedbackReportsDashboards

Search...

Feedback

Cloud Optimization

New ContactEditNew Opportunity

RelatedDetails

Feedback Name

Cloud Optimization

Engagement

Cloud Optimization

Survey Score

5

Comments

Achieved cost savings as expected.

Created By

Nelson a. 7/22/2025, 11:09 AM

Owner

Nelson a.

Last Modified By

Nelson a. 7/22/2025, 11:09 AM

javascript:void(0)

Sample feedback with survey score and comments from the customer once in the implementation stage.