Customer Engagement & Solution Design Dashboard (Salesforce)

A Salesforce Lightning Dashboard and Automation

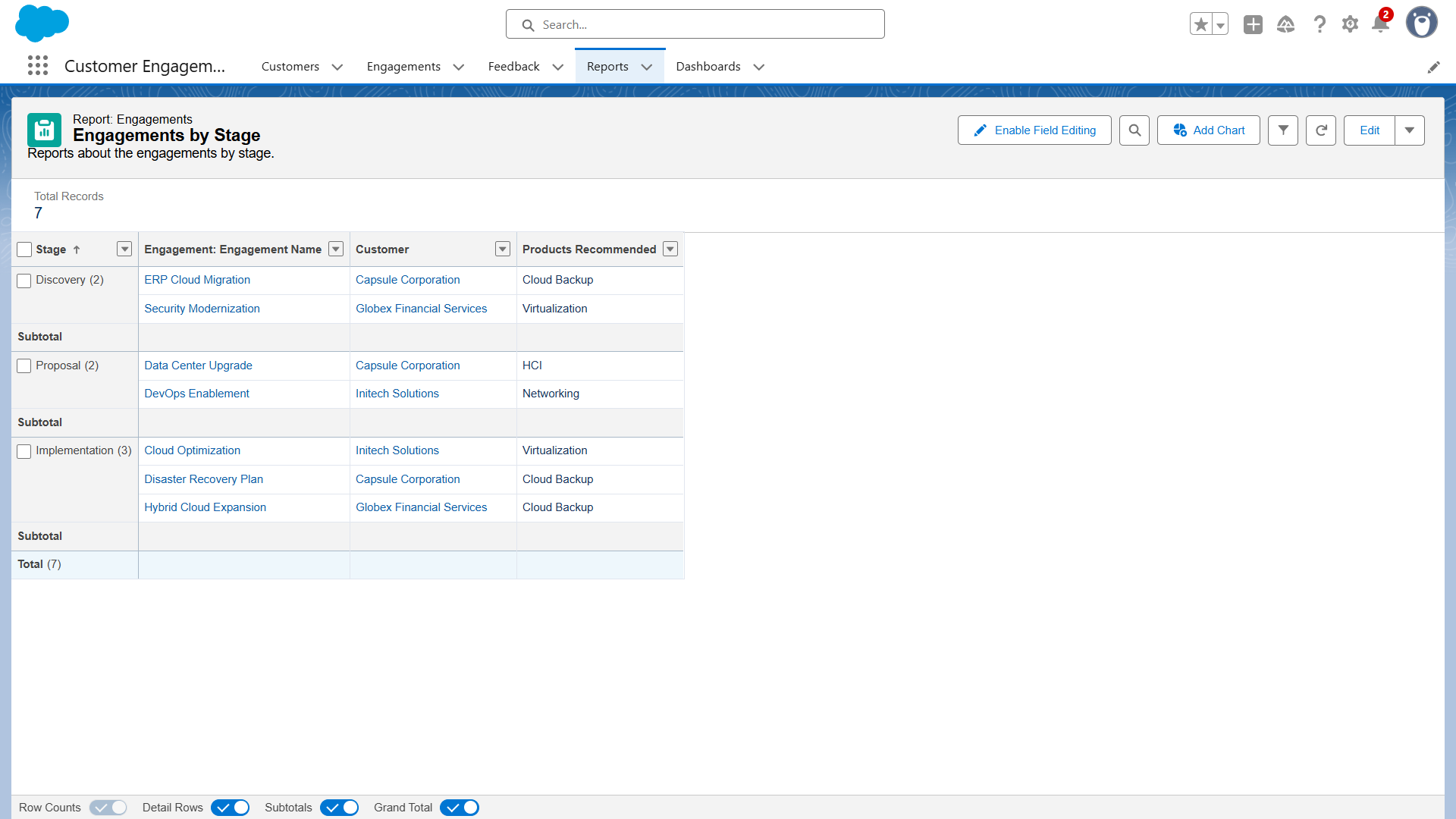
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This project showcases a Customer Engagement & Solution Design Dashboard built in Salesforce Lightning to address a common business challenge: lack of centralized visibility into customer engagement lifecycles and feedback. In this scenario, I’ve created 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**

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AI-generated content may be incorrect.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**

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

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

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

**Custom Objects**A screenshot of a computer

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

**Flow**

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AI-generated content may be incorrect.Record-Triggered Flow that automatically creates a Feedback record whenever an Engagement enters the Implementation stage.

**Sample Records**

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AI-generated content may be incorrect.Sample customer record with relationships to their engagements.

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AI-generated content may be incorrect.Sample engagement record and its relationship to its feedback.

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AI-generated content may be incorrect.Sample feedback with survey score and comments from the customer once in the implementation stage.