

# How Vertex helped a leading association management company reduce community onboarding time by 90%

Scaling Community Onboarding with Salesforce Experience Cloud

## Client Overview

- A top-tier association management company serving over 10,000 homeowners across more than 30 residential communities. With strong partnerships across the real estate and development ecosystem, the organization needed to rapidly scale operations while maintaining seamless self-service experiences.

## The Challenge

- The client's operations team faced major bottlenecks in onboarding new communities. Each new community website, with essential self-service features, required:



- The leadership team needed a faster, more scalable way to support growth and improve community experiences.

## Business Impact

Vertex delivered a scalable, templated Salesforce Experience Cloud solution that transformed how new communities were launched:

- › Website creation time reduced from 4-5 weeks to under 5 days
- › Resource requirement dropped from 5 to 3 team members
- › TNC could now build demo websites to attract prospective communities
- › Eliminated need for third-party tools (e.g., HubSpot) by enabling native Salesforce tools like Pardot and List Email Campaigns

## What We Delivered

A Lightning Bolt template solution on Salesforce Experience Cloud to replicate community websites efficiently

A fully configurable platform with reusable layouts and components

Integration with Salesforce-native marketing tools (Pardot, List Email Campaigns)

Foundation to adopt additional functionality like Formstack for permit requests, reservations, and maintenance workflows

## Technical Highlights

- › Leveraged Salesforce Lightning Bolt for scalable, templated deployments
- › Enabled Salesforce-native marketing automation, reducing 3rd-party tool costs
- › Integrated AppExchange tools like Formstack to streamline operational workflows
- › Opened up Salesforce Experience Cloud as a central platform for future community engagement and operations