



## Silverline Academy Transforms Wild Roots People's Clinic Processes and Systems



Wild Roots People's Clinic provides donation-based herbalism services to those with financial challenges in Omaha, Nebraska, and its surrounding communities, regardless of age, sexual orientation, or race. These services include wellness appointments with professional and student herbalists, free information, guidance, herbal formulas, and community education programs.

"Wild Roots is not only a non-profit, but a start-up non-profit," said Melissa Nelson, Silverline's Chief Value Officer and a Wild Roots volunteer. "They don't have a lot of money and no full-time employees. They're all doing this in their spare time, and have built a true clinic for herbal consultations that support wellness for underprivileged communities in South Omaha. It is a lot of work but it is a great mission."

Nelson saw an opportunity where Salesforce could be invaluable for the organization, and Silverline had an enthusiastic team of Salesforce consultants and developers on deck to help.

The Silverline Academy is a three-month Silverline program for people that are looking to start a career in the Salesforce ecosystem. Academy students go through rigorous training to become certified Salesforce consultants. Students learn development and tooling skills, solution architecture, client and project management, design, and system testing approaches.

The Academy is based in Omaha, and seven students had the opportunity to work with Wild Roots for their final capstone project. The pro-bono initiative allowed Academy members to take their learnings and apply them within the context of a real-world project. This project was unique because it was the first time Academy members met face-to-face with a client.

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One of the major topics that we learned throughout our time at the Academy was consulting skills like how to talk and engage with clients, and how we're able to help paint a picture for them based on what they want to see in a CRM platform like Salesforce.

Coleman Wright  
Silverline Academy Graduate

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### Clinic challenged by inefficient manual systems

Wild Roots holds a monthly clinic where clients come in for herbs and teas available at the onsite apothecary. Wild Roots used a rudimentary tracking system of Google Forms, Docs, and Spreadsheets for new client forms, inventory management, apothecary refill orders, and other clinic needs. This system involved manual entry and lots of redundancy.

During discovery sessions, the Silverline Academy team realized that Wild Roots would need significant technical support and that their behind-the-scenes logistics were always secondary to serving clients. But for Wild Roots to evolve from a grassroots organization, it needed better tools and processes to move forward with its goals of gaining additional funding and hiring more staff.

"The Academy students became a virtual and actual partner in the process of building this multifunctional tool," said Ramona Tortorilla, Co-Founder of Wild Roots. "Everyone knew their role and stepped up graciously when our volunteer team had input and requests for change. The Silverline team made it look so easy, even when we knew they were knocking themselves out to get it right."

Wild Roots needed a seamless process for gathering the client's information, having the client meet with the herbalist, checking inventory for the herbal formulas and teas, and fulfilling the order with labeling and documentation for the client to leave with. The clunky process was fraught with bottlenecks in four main areas that the Academy was able to resolve with Salesforce:



### Inventory Management

The clinic apothecary carries hundreds of items ranging from common to specific. Previously, the clinic had a volunteer whose entire job was to go back and forth between the herbalist and the apothecary to share inventory availability. This information sharing was carried out with a piece of paper to keep track of the herbs that were out of stock, on back order, etc. To avoid this chaotic process, Salesforce provided access to live inventory in real time.



### Labeling

Wild Roots was typing out each herb label, leading to a bottleneck on clinic days. Silverline Academy graduate Ryan Narducci shared how the team resolved this issue, “We stored all the product data in Salesforce. We created a Salesforce flow that allowed Wild Roots to conveniently copy and paste the formatted label information from a Salesforce field to their label maker. They could then print out the label along with the herb information document for the client to take home.”



### Apothecary Order Forms

Wild Roots had a very laborious process of manually creating an order form for each client visit that detailed all of the services and products provided. Using Salesforce and Conga Composer, with licenses graciously donated by Conga, they can merge all of the necessary information into the order form directly from the data in the Salesforce records. This not only reduces the amount of time in the apothecary 10-fold, but also ensures data accuracy for Wild Roots’ clients.



### Custom Herbal Teas

The herbalist creates a custom tea or tincture blend for the client’s specific health needs. To fulfill these unique blends, the herbalists need to know if the apothecary has available inventory of the necessary herbs. The Academy team translated this need into the Salesforce data model to give herbalists visibility into the apothecary inventory.

## The Academy implements a maintainable and trackable solution

The Academy team’s goal was to automate Wild Roots’ processes with Salesforce. As a non-profit organization, Wild Roots could obtain Salesforce licensing at no cost for up to 10 users. Salesforce includes a non-profit starter pack with built-in functionality specifically focused on non-profit organizations.

From a technical perspective, the Academy team needed to implement a Salesforce system that would be maintainable by Wild Roots volunteers in the future without any technical staff. Therefore, the design and development focus was on configuration-based solutions, and the entire tool was built without any custom code.

The Salesforce minimum viable product (MVP) created by the Academy team included the following:

- Web to lead
- Contacts and person accounts
- Care plans
- Filling formulas and inventory deduction
- Tracking of other services provided, such as massage therapy
- Inventory management of herbal products
- Ability to print forms using Conga Composer
- Ability to combine data and format for labels
- Migration of current inventory
- Reports and dashboards

#### Additional enhancements after the go-live included:

- ✓ Appointment scheduling with CalendarAnything
- ✓ Tracking of educational programs and attendees
- ✓ Volunteer tracking
- ✓ Training videos



## Wild Roots enhances client and volunteer experiences

The Wild Roots herbalist, apothecary, volunteer, and front desk teams now have an efficient and easy-to-use tracking process with the flexibility to make adjustments in real-time. Without having to deal with time-consuming administrative tasks, Wild Roots can now focus on taking the organization to the next level and work on more important initiatives like getting their word out and obtaining more donations to build the organization.

“With Salesforce, Wild Roots can report on their demographics and start looking at trends across their clients to uncover the main reasons people are coming to the clinic,” said Melissa Nelson. “They can now better understand the business and offer educational programs that respond to the most urgent needs of the community and fill in those gaps. All that in addition to immediate operational benefits like notifications for low or expired inventory and a streamlined process for placing and renewing orders.”

Maintaining strict compliance with the FDA’s Good Manufacturing Practices requires very detailed inventory management for herbalists. Salesforce simplifies an otherwise complex process, allowing Wild Roots to worry less about keeping good records. They now spend fewer hours between live clinics doing catch-up paperwork to stay compliant.

User adoption of the new Salesforce system is high. The Wild Roots volunteers took time out of their busy schedules to learn the new system with Silverline’s training materials, demos, and videos.

Silverline Academy team leader Nick DeBiaso said, “The volunteers’ passion for what they do was a very motivating factor. As technology consultants, it’s always about the nuts and bolts of building the tool, the system, and the process. While all of that is important, I think the value in delivering this product has been inspirational because you can really see the change that it’s making.”

“Salesforce sets us up for a kind of future we couldn’t dream of attempting this early in the life of Wild Roots,” said Tortorilla. “Now when we hold clinics and bring together teams of volunteers, everyone’s role is fully supported and simpler without paper files and duplicated efforts. Inventory is easy to view, formulas are quickly put together, and clients are excited to see our growth because that means we’ll be around to serve their needs into the future.”

**“ Thank you Silverline for making it easy to pay it forward to our community! You’ve given Wild Roots and herbalism the tools we needed for compliance, organization, creativity, and growth. That’s a huge win for everyone! ”**

Ramona Tortorilla  
Co-Founder, Wild Roots People’s Clinic

## About Silverline

Silverline tailors digital transformation solutions to meet your needs. From strategy and implementation to managed services, we guide our clients to success — enabling continuous value with the Salesforce platform. We also offer CalendarAnything, a popular scheduling application on the AppExchange, as well as industry-proven accelerators. For more information visit: <https://silverlinecrm.com/>

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