Custom Join Process
The ESOP Association Case Study

The ESOP Association | ESOP

Acadia Bay CONSULTING

Executive Summary

A modern, duplicate-resistant join built with LWC on Experience Cloud that members finish in one sitting, and that gives staff the insight to recover abandoned joins.

Introduction

Join once. Get it right.

ESOP wanted a modern, trustworthy join experience that felt effortless for members and produced clean data in Salesforce and Fonteva. We built a streamlined **Lightning Web Component** experience in **Experience Cloud** that simplifies steps, prevents duplicates, and gives staff real visibility into errors, plus the ability to update pricing and landing copy directly from **Fonteva** Items, all while maintaining the look and feel of the existing website.

Key Results

+18%	**-97%**	**-65%**	**100%**
estimated increase in join completion rate	fewer duplicate records created during join	reduction in staff interventions tied to joining	ability to identity failed attempts for proactive recovery

The Challenge

The prior join form was working against the business. Members would reach a dead end with cryptic errors, abandon the process, and sometimes create duplicate records trying again. Staff couldn't see who failed or why, so outreach was reactive at best and clean-up was constant. Leadership wanted a

straightforward way to join across Corporate, Professional, Affiliate, and Educational paths, consistent enough to be intuitive, controlled enough to protect data, and simple enough that pricing and landing copy could be refreshed without a release. In short: make joining effortless for members and predictable for operations.
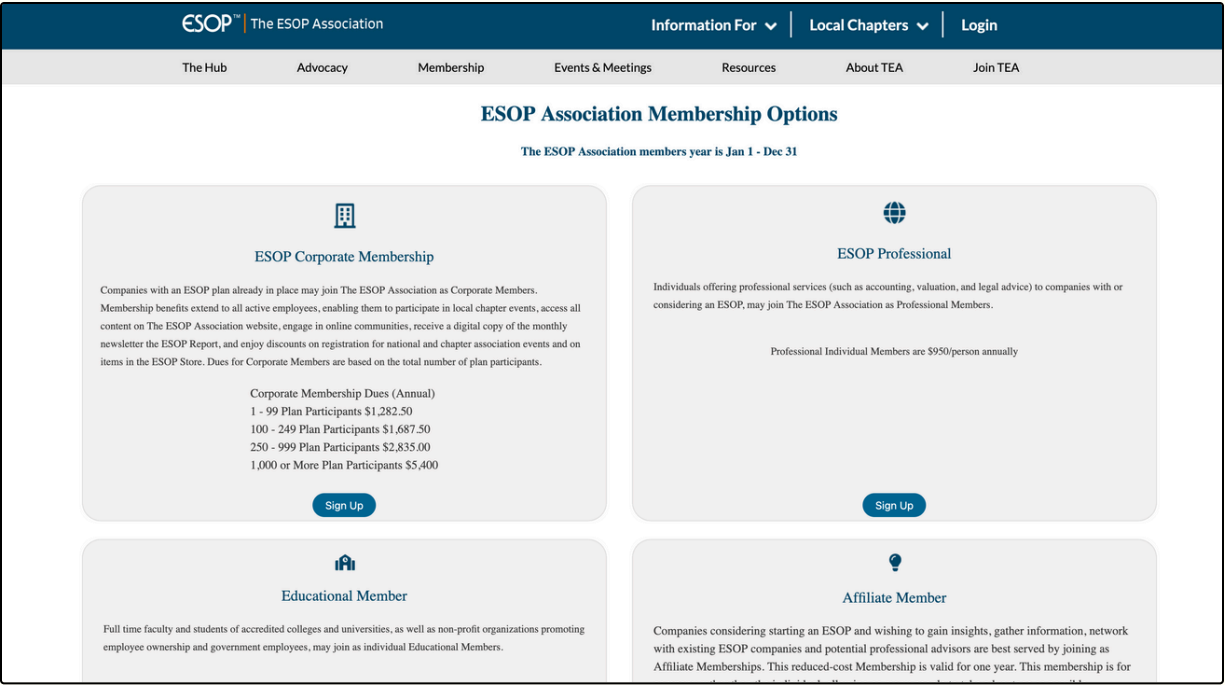
The Solution

A pragmatic, native build members don't have to think about
We replaced the unreliable legacy form with a purpose-built Lightning Web Component join experience in Experience Cloud. The guiding principle was simple: let members glide through a familiar path while the component does the heavy lifting, validations, mappings, and sensible defaults, so data lands correctly in Salesforce and Fonteva on the first try.

Architecture & approach
The LWC handles logic, sequencing, and validation, while leveraging platform metadata for items, pricing, and mapping. The experience remains consistent across Corporate, Professional, Affiliate, and Educational joins, which means members don't have to learn a new pattern for each product.

Make joining effortless
We simplified the forms, removed non-critical fields, and revealed "Other (fill in the blank)" inputs only when they're relevant. Page transitions always land at the top to reduce confusion. During contact collection, Executive Staff (CEO/COO/CFO/C-Suite) are clearly separated and shown above general staff, with quick-add for First/Last/Email/Job Role. Checkout was decluttered by removing distracting elements like quantity/maximum price that weren't relevant to the organization.

Keep data clean by design

To curb duplicates (the client's biggest pain) we tightened validations and aligned mappings so new records are created only when they should be. Email/domain standards are enforced according to membership type. Picklists are properly mapped now, and "Other" is handled with a proper free-text capture that preserves reporting integrity.

Give staff visibility (and a lifeline to members)

We surfaced actionable error context when a join attempt fails. Staff can now see who encountered an issue and reach out proactively, turning unknown drop-offs into recoverable opportunities and protecting revenue.

Admin guardrails that still empower marketing

To balance flexibility with data quality, admin edits are intentionally limited to what's safe to change on the fly: landing copy and pricing, driven by fields on Fonteva Items. Everything else is locked into the component so the member experience stays stable and the data stays clean.

The Results

Today, ESOP's join experience is calm, fast, and measurable. Members complete in one sitting, and when something does go wrong, staff see exactly who struggled and follow up to finish the sale. Duplicates are down (**−97%**), interventions are fewer (**−65%**), and data lands cleanly in Salesforce/Fonteva, freeing the team to focus on welcoming new members instead of reconciling records. For executives, that translates to captured revenue and a better first impression; for operations, it's a durable process with

clear guardrails and admin-friendly pricing/copy updates. The estimated **+18%** lift in completion, and the ability to recover abandoned joins, all while maintaining the look and feel of the website, make this a compelling proof point for how Acadia Bay modernizes membership on Salesforce.

> "**We didn't just get a new form, we got a dependable process. The visibility into errors and the drop in duplicates are game-changers.**"
> — Damon Roberts, Salesforce Administrator, The ESOP Association