

Case Study: National Philanthropic Trust

How National Philanthropic Trust scales billions in assets with Gearsset's end-to-end platform

National Philanthropic Trust (NPT) is an American independent public charity and one of the largest grantmaking institutions in the United States. Salesforce is the heartbeat of NPT's mission, helping the team manage every donation and grant with the precision required to handle billions of dollars in charitable assets.

NPT's Salesforce org is over 14 years old, and so it needs a robust Salesforce DevOps process to maintain stability while delivering value to its donors and partners.

Alex Louderback, DevOps Engineer at NPT, shared how the team transformed their legacy environment by unifying their DevOps and data protection tools.

"I'm a huge fan of Gearsset. When I joined NPT, we were using Gearsset's [Compare and Deploy](#) and [CI/CD Pipelines](#), and I wanted to migrate all of our Salesforce DevOps processes to Gearsset. Then, when Own increased its prices for [Salesforce Backup](#) and we learnt about [Code Reviews](#), it made complete sense to switch. Moving to an end-to-end platform was a no-brainer."

Quick Stats

- **Size:** 100+ employees
- **Industry:** Philanthropy / Financial Services
- **Location:** Jenkintown, Pennsylvania
- **Products:** Compare & Deploy, CI/CD Pipelines, Code Reviews, Backup & Restore

Tackling tech debt and tooling fragmentation

One of the main challenges Alex's team was facing was managing a legacy org with over a decade of technical debt. The top priority for the team was "raising the floor" of its DevOps maturity — not only to prevent errors during deployment but to ensure the business could recover rapidly if a mistake occurred.

Before fully adopting Gearsset, the team's process was hampered by manual quality checks where developers were responsible for their own peer reviews. Without automation, it was difficult to catch issues like outdated API versions before they reached production.

NPT used Own for data backup, but found it increasingly expensive and unintuitive. "The previous solution was clunky," Alex explains. "It didn't feel integrated into our actual development workflow." Having a backup solution on a different platform to Gearsset risked slowing down data recovery in the event of a data loss incident.

NPT expanded their use of Gearsset from simple deployments to a full lifecycle approach, integrating CI/CD Pipelines with Code Reviews, and Backup.

"My role is to prevent mistakes and be ready for any scenario. With a 14-year-old org, you need tools that give you total confidence and Gearsset gives us just that." — **Alex Louderback, DevOps Engineer**

Code Reviews: NPT's newest team member

To tackle the challenge of long-term technical debt, NPT chose to adopt automated code reviews. After evaluating several options — including CodeScan and Salesforce's Code Analyzer — Gearset's Code Reviews was the clear winner.

The deciding factor was Code Reviews' breadth of metadata scanning. While other tools focused strictly on Apex and LWC, NPT's team are heavy Salesforce Flow users. Gearset's ability to scan Flows for best practices was the specific capability the NPT team needed to secure their most critical automation.

Shifting left to save time

The team has replaced manual, inconsistent peer reviews with automated analysis for every pull request, streamlining their quality control. NPT treats Code Reviews almost like a team member; fully integrated into their workflow, the tool surfaces potential issues in real-time, benchmarking code against both industry anti-patterns and specific team conventions.

By "shifting left" — moving quality checks to the very beginning of the process — NPT now catches about 80% of issues at the moment a developer opens a Pull Request (PR). This automation eliminates the need for manual back-and-forth communication regarding naming conventions or missing fault paths.

Once a PR is opened to a UAT environment, a human will approve any changes with Code Reviews also doing a scan, which is where any remaining errors will be caught.

"We affectionately refer to Code Reviews as the 'annoying little brother' because it's always there to point out a required fix. We're so confident in Code Reviews' output that it's now the sole automated approver for pushing code to our first test environment. This has significantly reduced the time we spend fixing manual errors later in the cycle. Code Reviews ensures our code quality is held to a high standard, which has helped us create a much better and healthier org."

Integrated data backup and restoration

While Code Reviews provides NPT with complete confidence in their deployments, the team also required a comprehensive Salesforce backup solution to mitigate the risk of data loss.

"From our perspective, Code Reviews and backup go hand-in-hand. Code Reviews is the first line of defence and backup is the safety net."

The 30-minute recovery target

One of NPT's major challenges with their previous backup solution was the friction involved when moving data between different platforms. In a data loss incident, every second counts. If disaster strikes, NPT's goal is to restore everything in under 30 minutes. Having to log into a different platform and switch between tabs was counter-intuitive to achieving that goal.

By consolidating backup into Gearset, NPT removed the technical and cognitive load and compliance complexity of having multiple vendors. Because the NPT team was a Gearset "power user", the learning curve was non-existent.

"It wasn't logical to have a backup solution that was on another platform to our primary Salesforce DevOps platform. Using Gearset's backup means that all our processes are happening within the platform that we know and love. In the event of data loss, we know we can have everything back up and running within 30 minutes, whether that requires pipeline restoration, a rollback, or a snapshot.

Now, Gearset's daily backups gives NPT complete peace of mind that any data changes are stored securely. Alex has also been able to reassure the company's leadership about the safety of NPT's systems. *"We can now tell our executives that we can restore 100% of the system if anything goes wrong and that's given the organization even greater confidence in the security of our data."*

World class support

Alongside the platform's technical capabilities, Alex says Gearset's support team is what sets the company apart from other vendors. Compared to the days-long wait times Alex experienced with other providers, Gearset's in-app chat offers almost instant, personalized support.

"I cannot overstate the incredible support I get from Gearset. I'm never waiting more than five minutes for a response that helps solve the issue. The speed of Gearset's responses helps me and my team be more efficient. The time we spent waiting on updates from previous vendors are now being used to help the business by improving our Salesforce org."

A faster, more stable release cycle

By consolidating their stack into Gearset, NPT has achieved a more efficient and stable Salesforce org that's delivering greater business value. The team has the confidence to deploy multiple times a day without the fear of breaking anything in their org, and peace of mind that all data can be recovered with reliable backups.

NPT plans to expand its usage of Gearset by leveraging sandbox seeding and data masking, ensuring developers have safe, high-quality data to work with without compromising privacy.

"Gearset is a fantastic technology partner who's helping us reduce friction and scale our processes. They are an extension of our team, which speaks to the incredible standard of the platform and the people. I couldn't imagine not using Gearset."