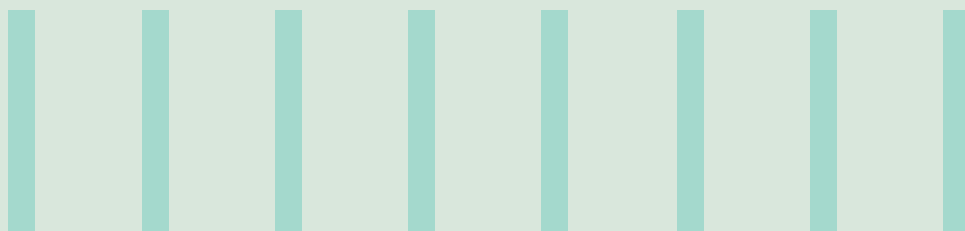




MODERNIZING GRANT MANAGEMENT FOR THE PUBLIC SECTOR WITH INFOSYS AND SALESFORCE

A COMPREHENSIVE WHITE PAPER ON DIGITAL
TRANSFORMATION, AI-ENABLED OVERSIGHT, AND
LIFECYCLE MODERNIZATION



The Evolution of Customer Service Expectations

Government grant programs channel billions of dollars annually into essential public services, including healthcare, education, broadband access, economic recovery, environmental sustainability, and community development. However, public sector agencies continue to encounter significant challenges across the grant lifecycle—from outreach and application intake to award, post-award monitoring, reporting, and closeout. Manual processes, fragmented technology systems, and lack of coordinated oversight slow decision-making, reduce transparency, and increase the risk of improper payments and fraud.

Recent oversight reports demonstrate the scale of vulnerabilities: the U.S. Government Accountability Office (GAO) estimates that **hundreds of billions of dollars** in pandemic-era payments may have been fraudulent, with **2,532 defendants found guilty of fraud-related charges** by December 2024. The Pandemic Response Accountability Committee (PRAC) reports **more than \$2.5 billion in estimated fraud losses** across over **1,200 investigations** as of January 2026. In total, independent analyses found that **\$280 billion was stolen and another \$123 billion misspent** from federal relief funds during the pandemic response.

These numbers underscore the urgency of modernizing grant management systems with secure, connected, and intelligent solutions. Salesforce Grants Management provides a unified digital platform that enables agencies to streamline operations, improve compliance, reduce administrative burden, enhance collaboration, and ensure greater accountability. The addition of Artificial Intelligence (AI), including generative and predictive capabilities, further transforms grant programs from compliance-driven workflows into data-driven ecosystems focused on measurable outcomes and community impact.

This white paper presents a comprehensive view of the challenges facing public sector grant management, the capabilities of Salesforce and Infosys, and the strategic role of AI in building future-ready, transparent, and equitable funding systems.

Introduction

Public sector grant programs have become increasingly complex, both in scale and scope. Agencies manage thousands of grant applications across multiple funding streams, each with distinct eligibility rules, reporting requirements, and compliance frameworks. Legacy systems—often built around spreadsheets, manual workflows, or siloed applications—are not equipped to manage these complexities effectively.

Key drivers for modernization include:

Rapidly Increasing Oversight Demands

During the COVID-19 pandemic, the rush to distribute critical funds revealed systemic deficiencies. For example, improper payment rates in some relief programs exceeded 21%, with an estimated \$191 billion in unemployment insurance payments alone potentially improper according to oversight testimony before Congress.

Rising Expectations for Public Transparency

Oversight bodies such as PRAC have emphasized the need for cross-agency data integration and public-facing transparency platforms capable of tracking every dollar at each stage of the grant lifecycle.

Need for Impact-Oriented Delivery

Traditional systems track spending and compliance rather than outcomes. Policymakers increasingly demand evidence of measurable social, economic, and community impact.

Commitment to Equity and Accessibility

Digital-first, multilingual, accessible systems are now essential to ensure equitable access to funds among underserved populations and smaller organizations.

Digital Security and Compliance Requirements

Government systems must align with:

- FedRAMP High
- DoD Impact Level 4
- NIST 800-171
- HIPAA
- IRS 1075

A modern, cloud-based, AI-enabled grant management platform like Salesforce is essential to meet these evolving needs.

Understanding the Key Challenges in Grant Management and the Need for Modernization

Government grant programs operate in complex, high-stakes environments where accuracy, accountability, and efficiency are paramount. However, several longstanding challenges continue to impede effective grant administration:

Fragmented Systems and Inefficient Coordination

Most agencies rely on legacy systems that do not communicate with one another. This creates gaps in data flow, slows down eligibility checks, and results in inconsistent communication across agencies, grantees, and oversight bodies.

High Administrative Burden

Manual data entry, paperwork-driven workflows, and email-based tracking consume staff time and introduce significant risk of errors. These inefficiencies are magnified during emergency programs requiring rapid deployment.

Heightened Fraud, Waste, and Abuse Risks

Oversight findings have shown vulnerabilities in identity verification, document validation, and cross-database checks. Pandemic-era program reviews revealed widespread improper payments and fraudulent claims—demonstrating the need for automated controls and proactive risk detection.

Data Security and Privacy

Grant applications contain sensitive personal, financial, and sometimes health-related information. Ensuring compliance with federal data protection frameworks is critical, yet many agencies lack systems designed for modern cyber risk.

Regulatory Complexity

Programs must comply with frameworks such as the Payment Integrity Information Act (PIIA), Uniform Guidance, and other federal audit requirements. Outdated systems struggle to maintain audit trails, track corrective actions, or provide consolidated reporting.

Limited Real-Time Visibility and Reporting

Legacy systems lack consolidated dashboards to track funds, outcomes, and risks across the lifecycle. Agencies often discover discrepancies late in the process, affecting compliance reporting and program evaluation. Without real-time oversight, identifying risk hotspots or analyzing program performance becomes challenging.

Technology Integration

As the systems and processes across grant management digitize, it is challenging to integrate them due to compatibility issues, data migration complexities, and the employees' resistance to change. Grant management still lacks the 360-degree system integration between government agencies, non-profits, stakeholders, and last-mile beneficiaries.

Grant Lifecycle Management

From submitting the initial application to receiving the grant, budgeting, and reporting its outcomes, each step requires meticulous planning, coordination, and transparency. Subpar processing at any of these stages could cause project delays, regulatory non-compliance, and strained relationships.

These challenges highlight the need for an integrated, secure, and data-driven platform to support the entire grant lifecycle.

Understanding Salesforce for Grants Management

Salesforce Grants Management provides a unified, end-to-end platform designed specifically for government agencies and nonprofits to manage the full grant lifecycle with efficiency, transparency, and accountability. By digitizing core processes and enabling seamless collaboration across stakeholders, Salesforce empowers agencies to reduce administrative effort, improve program performance, and ensure equitable and compliant distribution of funds.

The platform supports the entire lifecycle — **Program Administration, Outreach & Intake, PreAward, Award, PostAward, Closeout, and Oversight** — while providing the flexibility and scalability required for diverse grant programs. Through automation, integrated data flows, and userfriendly interfaces, Salesforce enables agencies to respond swiftly to policy directives, community needs, and emerging risks. Let us understand how it helps manage grants:

Reduced Turn-Around Time

Automated eligibility checks, guided workflows, centralized document management, and streamlined reviewer assignments accelerate application evaluation. Self-service portals empower applicants to track submissions, upload documents, and resolve common queries, reducing manual intervention and improving responsiveness.

Accessibility for Non-Technical Users

Salesforce is designed to be intuitive and easy to navigate for users with varying technical proficiency:

- Guided online forms minimize application errors
- Clear, step-by-step workflows reduce confusion
- Standardized reporting templates simplify postaward submissions
- Dashboards provide real-time insight into grant progress

This inclusivity ensures faster onboarding, higher user adoption, and smoother experience for both agency staff and applicants.

Automation Across the Lifecycle

Grant programs often involve repetitive and labor-intensive tasks such as:

- Proposal scoring
- Eligibility verification
- Award calculations and payment scheduling
- Post-award performance reporting
- Milestone tracking and compliance reviews

Salesforce automates these tasks using workflow rules, approvals, triggers, and configurable logic. This reduces the risk of errors, strengthens data accuracy, and frees staff to focus on high-value activities such as program analysis, risk mitigation, and stakeholder engagement.

Quick Time-to-Market

One of the platform's core strengths is its ability to support rapid deployment:

- Pre-built templates for applications, reviews, and reporting
- Configurable workflows that adapt to varying program rules
- Low-code tools that eliminate the need for extensive development
- Packaged integrations that simplify connectivity to existing systems

This enables agencies to launch or update grant programs quickly — a critical capability during emergency response or policy-driven expansion cycles.

Enhanced Interoperability

Salesforce connects seamlessly with ERP systems, financial tools, document repositories, and analytics platforms via robust APIs and MuleSoft integration patterns. Embedded Tableau or Power BI dashboards provide real-time insights into expenditures, performance, and risk indicators.

Together, these capabilities enable agencies to manage grants with greater transparency, speed, and control. When combined with AI, Salesforce becomes a foundation for more strategic, impact-driven grant operations.

Grantmaking: Capabilities					
Program Administration	Outreach & Intake	Pre-Award	Award	Post Award & Closeout	Oversight
PROGRAM SETUP Set up grant programs including scope, description, goals, objectives, performance measures, and expected outcomes	PORTAL COMMUNITY Allow grantseekers, grantees, and others to collaborate in one place throughout the grant lifecycle.	APPLICATION REVIEWS Evaluate application completeness, eligibility, merit, and project budget.	DEVELOP AWARD Develop and document award agreement with specific terms and conditions, including financial and performance reporting requirements and schedule.	AWARD MODIFICATION Receive, evaluate, and approve request for award modification (e.g. changes in funding or period of performance). Determine funds availability, obligate funds, & document modification details.	OUTCOME MANAGEMENT Evaluate and monitor award and portfolio level progress toward the funder/funding source's overarching goals. Revise outcome targets and timeframes as needed based on externalities
PROGRAM FUNDING Document grant program funding and spend plan.	ONLINE APPLICATION Allow grantseekers to apply for grants online.	DUE DILIGENCE Evaluate applicants for potential unacceptable risk. Develop risk mitigation actions for applicants with acceptable risk.	AWARD GRANT Notify applicants of award decision. Work with selected applicants to finalize award details and terms for acceptance or rejection.	PERFORMANCE REVIEW Allow grantees to submit performance details. Evaluate information against award agreement and performance goals and objectives. Document issues, concerns, and follow-up actions / improvement plan.	REPORTS & DASHBOARDS Analyze and visualize operational functions related to disbursements and reporting requirements, as well as program/portfolio performance relative to the intended outcome targets.
ESTABLISH FUNDING OPPORTUNITY Determine and set up grant funding opportunities including application, timeline, eligibility criteria, and review / evaluation criteria.	BUDGET REQUEST Allow grantseekers to submit their proposed project budget.	SELECTION MANAGEMENT Compile review evaluations and make final recommendations and selection.	OBLIGATE FUNDS Change funding status to obligated, determine funds availability, and schedule disbursements, as applicable.	FINANCIAL REVIEW Allow grantees to submit financial details. Evaluate financial information against award agreement and accomplishments related to performance goals and objectives. Document issues, concerns, and follow-up actions / improvement plan.	BUDGET MANAGEMENT Enable program staff visibility into remaining available program and grant budget(s). Transfer/rebalance portions of available budget from one program or grant to another.
BUDGET SETUP Setup internal budgets in order to keep track of allocated, committed, and paid disbursements.	APPLICANT COLLABORATION Allow multiple individuals work collaboratively on an online grant applications.	RESERVE FUNDING Determine funds availability and provide funds commitment information for approved applicants.	PAYMENT PROCESSING Receive, evaluate, and approve request for payment and supporting documentation. Determine if spending is on track, verify funds availability, and submit disbursement request.	COMPLIANCE REVIEW Conduct desk review, site visit, or audit to evaluate grantee compliance with award agreement and other regulations. Document non-compliance details, determine remedies, and develop improvement plan for resolution.	
INVITE OF MEMBERS Post an invitation-only funding opportunity.	APPLICATION OCR PROCESSING Digitize files and data from applications submitted via postal mail or hand-delivery and/or digital file uploads.	DOCKET MANAGEMENT Group a set of reviewed, cross-program applications that will be reviewed for funding by a board or external committee.		RISK MANAGEMENT Evaluate award recipient risk based on performance, financial, and compliance review information, audit findings and corrective actions information, and prior risk evaluation information. Take action as necessary.	
	APPLICATION SUPPORT Public questions posed to issuing organization for disposition and visibility to whole community.			TERMINATION / SUSPENSION Terminate (full or partial) award or suspend / debar grantees based on reviews and risk. Evaluate grantee challenge to suspension or termination and provide response.	
	ELIGIBILITY QUESTIONNAIRE Pre-portal or pre-application form to be completed by potential applicants to determine where they meet the criteria for the organization or funding program.			AWARD CLOSEOUT Allow grantees to submit final reports when period of performance is ending. Validate funds paid, request deobligation of funds, as necessary, and verify and document all closeout actions are completed.	

Figure 1 : Salesforce Grant Management Capabilities

AI in Next-Generation Grant Management

Artificial Intelligence is fundamentally reshaping how government agencies design, administer, monitor, and evaluate grant programs. With growing oversight pressures, rising fraud risks, and the need for faster, more transparent service delivery, AI has become central to modernizing the grants lifecycle. Salesforce's publicsector AI suite: **Agentforce for Public Sector** provides governmentgrade, secure, and explainable AI capabilities that automate administrative work, accelerate decision cycles, and enhance constituent and applicant experiences. These AI capabilities are delivered on the secure, compliant **Salesforce Platform**, reinforced by the **Einstein Trust Layer**, which ensures responsible, FedRAMPaligned AI adoption.

AI will not merely improve today's grant operations—it will redefine the next decade of public funding through intelligent automation, predictive insights, and equitable, data-driven outcomes. Human in the loop will become critical to verify the grants administration is as per policy, data quality is accurate to avoid bias, designing guardrails to avoid fraud and design systems which can enable easy explainability.

Automated Eligibility and Document Verification

AI can extract and validate information from identity documents, financial statements, and tax forms. This reduces manual processing and minimizes improper payments by identifying inconsistencies early.

Fraud, Waste & Abuse Detection

AI models use anomaly detection such as duplicate applications, unusual spending patterns, or high-risk beneficiaries—helping agencies catch issues earlier and strengthen program integrity.

AI-Assisted Application Review

AI provides concise summaries of long-form applications, identifies missing information, and highlights potential risks. This accelerates reviewer workflows and ensures consistent decision-making.

Generative AI for Reporting and Compliance

AI can draft progress summaries, monitoring reports, and compliance narratives using data from grantee communications, milestones, and documents—reducing administrative workload and improving audit readiness.

AI-Assisted Applicant Support

Agentforce conversational bots help applicants with eligibility checks, form guidance, documentation requirements, and status updates—significantly reducing inquiry volumes and improving accessibility.

AI enables agencies to be more transparent, fair, and responsive while ensuring responsible and secure adoption aligned with public-sector standards.

The Steps to Begin Modernization

Modernizing and optimizing grant management through Salesforce must be a step-by-step approach that starts with analysing current requirements. Here are the steps we recommend:

Put Process and Policy Refinement before technology changes:

The ultimate objective of the grants process is to ensure that funds are consolidated, administered, and utilized effectively. As process complexity increases, so do opportunities for fraud, inefficiency, and operational breakdowns. To counter this, agencies must prioritize designing processes that are simple yet robust, standardized, and repeatable. These improvements must begin at the policy and process level—technology should enable well-defined processes, not compensate for poorly designed ones. Getting this foundation right not only accelerates successful technology adoption but also strengthens overall grants administration. While agencies may believe their needs are unique, this is the moment to return to first principles, identify root causes, and streamline the process for clarity, consistency, and impact.

Assess current systems and needs

Analyse current systems and processes considering the challenges discussed above. Isolate the pain points, bottlenecks, and funds leakages. This analysis informs which systems and processes need to be retained, and which ones need to go.

Define success metrics

Define the metrics to track the success of the Salesforce grants management system. Common metrics include:

- Number of grant applications received
- Type of grant applications
- Funding awarded
- Grant process metrics

Develop a Roadmap for Implementation

Consider starting with a pilot project and monitoring its performance before expanding it to other grant programs.

Scale and Optimize

After validating the pilot, expand to other programs, enhance automation, integrate analytics, and introduce AI-driven features to strengthen oversight and impact measurement.

Collaborating with the experts for Salesforce Grants Management

Successful transformation requires both technology and expertise. Infosys Public Services brings deep experience in public-sector processes, Salesforce implementation, AI integration, data modernization, and compliance frameworks. Through proven accelerators, best practices, and domain knowledge, Infosys helps agencies:

- Streamline processes
- Improve data and system interoperability
- Implement AI responsibly
- Strengthen security and governance
- Accelerate time-to-value

Infosys ensures agencies maximize the potential of Salesforce to deliver more efficient, transparent, and impactful grant programs.



Conclusion

The challenges across the grant lifecycle highlight the need for a modern, unified, and intelligent system capable of meeting today's expectations for transparency, accountability, and program impact. Salesforce Grants Management—implemented with Infosys' public sector expertise—enables agencies to transform how they plan, award, monitor, and evaluate grants.

With a digitized platform, agencies can streamline workflows, coordinate resources effectively, design data-driven action plans, and monitor performance with real-time visibility. Looking ahead, AI will further amplify these capabilities. Salesforce's Agentforce for Public Sector and secure generative AI features will help agencies automate eligibility checks, detect fraud earlier, generate audit-ready documentation, and deliver more accessible support to applicants.

Together, Salesforce and Infosys empower agencies to transition from manual, process-heavy systems to **intelligent, outcome-driven, AI-enabled grant ecosystems**—strengthening the effectiveness, equity, and impact of public service programs.

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