



SalesFix

SALESFORCE COMING TO THE AID OF AN NFP ORGANISATION

CRM and ERP integration makes St John more streamlined than ever before



KEY BENEFITS

COLLABORATIVE

A proactive CEO who had used Salesforce in a previous role, introduced the system to St John Ambulance Queensland. Working with SalesFix gave the Queensland state service a tailored CRM system that modernised the way St John Ambulance operated. Salesforce has brought together staff, volunteers, students and many others throughout the organisation to deliver the highest standards of service that gives St John Ambulance the edge!

STANDARDISED

Bulky, manual, paper based systems were slowing down the processes across the St John organisation. With over 135 years in operation, it was time to improve efficiencies in business practices and standardise the way they did things across the board. St John Ambulance is a federated structure, however, Salesforce was still able to adapt and consider the needs of all groups.

FOCUSED

Focused on delivering their services more efficiently, St John Queensland looked closely at their paper based systems and knew it was time to introduce a professional CRM system that could work with them to ensure they stay around for another 135 years! Part of their focus was to eliminate double handling and be able to manage their invoicing more efficiently. This meant integrating their ERP system (MYOB in their case) with their CRM.



"The SalesFix difference is in the time they take to really get to know and understand your business. They take time to discover and learn more to ensure they provide a solution that achieves the right results".

Shay McAuley, St John Ambulance.

CLIENT

St John Ambulance are a self-funded NFP. They have been in operation for over 135 years across Australia.

They offer event health services, associated school programs, first aid training and in WA and NT St Johns are the public ambulance service.

To date St John have delivered first aid to over 1 million children on their associated schools program, they deliver first aid training to more than 500,000 people per year and issue over 300,000 first aid certifications.

Their overseas support programs also provide countries such as the Solomon Islands and PNG with money and resources for their health services.

THE SITUATION

St John operates a federated structure across Australia. All states and territories operate their own systems and it was the CEO of the Queensland service that recognised that their current systems needed to be addressed.

Long-standing paper based administrative systems were slowing things down, preventing growth and progression and affecting customer service across the organisation.

Manual procedures meant it was difficult for customers to book first aid courses, certificates were often issued weeks after a course was completed and there was no CRM system being used to make any of the other internal systems talk to each other, including their accounting package. Invoicing was a slow and cumbersome process and a new solution was desperately required.



THE CHALLENGE

Challenge:

To introduce a user-friendly CRM system and integrate it with their ERP (MYOB) system, that would replace their outdated manual systems, eliminate double handling, remove the paper from the office and make their invoicing and certification issuing processes seamless.

St John needed a customised system that could make the website, student management, accounting, volunteers and all other aspects of the business talk to each other.

What they asked for was to have a system that allowed customers to

- * Register online for their courses
- * Then automate the invoicing process
- * When courses were completed trainers could mark off as completed and certificates could be issued on the same day.

They wanted a single solution that would save them a lot of time and money.

RESULTS

From a time-heavy, paper-based system, St John Queensland now conduct all business operations through Salesforce. As a result, the customer experience in QLD has improved tenfold; certificates are issued same day, companies can complete online course bookings, customers can bulk book spaces and then add student details later, follow up emails are sent, bills are paid on time and information across all areas is structured and easy to find.

The results enable greater flexibility with clients, improved communication across all departments, leads and bookings are effectively managed, volunteer communication is improved, and time spent on manual administration has been greatly reduced.

The implementation of an integrated CRM with ERP system has meant that they no longer need 5 full time staff members on their admin team, saving an approximate \$275K per year on wages and allowing those funds to be pumped back into the Charity.

PriceWaterhouseCoopers did an audit of St John in Australia and said that if they were on a single solution they would save \$8 million a year.

"SalesFix worked with us to ensure that not only did they develop a solution that was 100% "fit for purpose", they also helped us to transfer knowledge to our employees so that everyone was on board. Their support is unquestionable, and they will always be our trusted sounding board for anything Salesforce related".

THE IMPLEMENTATION

Key personnel from SalesFix worked alongside management at St John Queensland. SalesFix took the time to learn about the pain points of the current systems and the desired outcomes required from introducing a CRM and integrating it with an existing ERP system.

"SalesFix knew what questions to ask to help us think about what we wanted to get out of the system", Shay McAuley stated. "They took the time to understand every aspect of our business and left no stone unturned".

It was obvious with an organisation of this size and structure that an "out of the box" solution would not be sufficient and a tailored package was created to ensure St Johns got the best from their Salesforce implementation.

Salesforce was rolled out across Queensland and SalesFix worked with the St John team to ensure all staff were across the system and used it to its full potential.

THE SALESFIX SOLUTION

As a result of the success in Queensland St John are about to roll Salesforce out across the other states. SalesFix have been able to work with St John Ambulance, recognise that the Federated structure of the organisation means that each state and territory adopts different processes and have designed a customised system that can accommodate all of the variables. Still ensuring that the system is streamlined and giving the same results Nationwide! "We are excited about the roll out across more states and territories. We have seen the success in Queensland and know Salesforce is the best solution for our organisation, with SalesFix as our long-term consulting partner", Shay McAuley.