



SalesFix



AUNTIES AND UNCLES INSPIRE HOPE FOR KIDS

KEY BENEFITS

SIMPLIFIED

With complex reporting requirements between children and mentors, Aunties and Uncles' case management system had to be accessible on the cloud, easy to use for all stakeholders, and above all, centralised. It has freed up staff to focus on improving quality of life for disadvantaged children.

ADAPTABLE

"Just as every business is unique, so is every not-for-profit. SalesFix understood the unique relationship mapping and reporting requirements of a small organisation, from limited capacity and part-time staff to IT literacy. In listening and responding, problems were anticipated and fixed.

STREAMLINED

Salesforce is a secure, flexible system in which reports and automation prompts are easily generated, all requirements can be handled, and all boxes ticked. The adaptability of the SalesFix approach streamlines all administrative processes to allow Aunties and Uncles more time for client-facing work.



"Since we implemented Salesforce for Case Management, there has been an increased transparency for our organisation to gauge the positive impact we have on these vulnerable children's lives."

- Brett Gibson, Board Technology Advisor, Aunties and Uncles Queensland

CLIENT

Aunties and Uncles Queensland provides support and relationship mentoring to vulnerable and socially disadvantaged children. The organisation helps foster the supportive, longer-term relationships that these children might not get within their home environment.

All mentors, board and committee members volunteer their time. The money raised by Aunties and Uncles employs fully qualified and experienced social workers, who are critical in providing appropriate and safe mentoring matches for kids.

THE SITUATION

Aunties and Uncles needed to improve their case management capabilities. With every social worker keeping notes on their own computer, there was no central database for their critical client information. It had become clear that the links between the children and staff, as well as the background checks, had to be secure and accessible.

Quality supporter engagement and marketing was also a concern. Aunties and Uncles wanted to know more about their target donors, oversee better documentation of these relationships, and ensure quality engagement.



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THE CHALLENGE

With complex parent/child/mentor relationships, plus a part-time and volunteer workforce, creating a centralised system was demanding. Not only does each child have unique requirements, the intricacies of background checks, including both parents and mentors, is considerable.

"The whole process was about giving the Link Coordinators (social workers) more time for client-facing work. We needed a streamlined system in which we knew the data was secure, reports could be generated, and our coordinators could be automatically prompted to tick all the necessary boxes. They are all part time so we needed to give them more time to do value-added client-facing work rather than administration," said Gibson.

Lead acquisition and customer engagement also needed to be intuitive for staff. "We needed a system that was broad enough to enable all staff and volunteers to contribute to marketing and fundraising activities quickly and easily.

"Overall, our biggest perceived challenge was how we could map these complex parent/child/mentor relationships to Salesforce CRM. But once we talked with SalesFix they resolved those issues immediately, and it was very easy to move forward," said Gibson.

RESULTS

As a social enterprise, Aunties and Uncles looks at improvement in the quality of life for disadvantaged children and the number they can help as the key end result.

"We focus on improving the quality of our work – making sure we provide the best link between child and mentor. Salesforce has given us the ability to provide those best links a lot more quickly, meaning we will be able to offer our services to more households in the near future and ultimately improve more children's lives.

"With some configuration, Salesforce is a very supportable, scalable, and easily maintained system. The CRM we looked at years ago was going to need customisations and ongoing upgrades which could break other areas of the system in the future. As soon as we started to work with SalesFix we realised that they knew how to customise Salesforce to work with our unique and complex relationship organisation.

"Since we implemented Salesforce Case Management, there has been an increased transparency for our business to gauge the positive impact that we have on these disadvantaged children's lives.

"In addition, this information makes it easier for us to communicate our 'big picture' successes to our donors, and show the impact of their support. We have such a better insight into the profiles of our Aunts and Uncles, parents, and the disadvantaged children and the key benefits we can provide."



"SalesFix was able to address our complex requirements."

THE APPROACH

After identifying goals for the project, Aunties and Uncles was drawn to the simplicity of Salesforce as well as the 'Power of Us' donated licenses, and engaged SalesFix. "We wanted a partner that was local, had considerable consultancy experience, and who understood not-for-profit organisations. SalesFix fitted our criteria perfectly.

"Given that SalesFix runs the Brisbane Salesforce User Group, it shows that they have an invested interest in Salesforce which was also really important to us. In addition, SalesFix seemed to really understand the particular intricacies of our sector," said Gibson.

THE IMPLEMENTATION

Along with creating one central database, SalesFix took the time to train staff in the new system to best oversee their client relationships.

"SalesFix really understood our capacity and IT literacy constraints, so the training and documentation they provided was fantastic. Picking up the system was a significant change for us, so it took a little while before there was 100% adoption rate. It is now in full flight! Everyone records all data and the reporting capabilities are now excellent.

"In particular, SalesFix was able to address our complex requirements around relationship mapping. They really listened to us. Together we were able to work out some of the daily challenges, and they translated how to map that across to Salesforce before any problems arose."

THE SALESFIX SOLUTION

Salesforce's cloud-based central database proved a great advantage to the small team. It ensured greater efficiencies and gave the organisation peace of mind knowing their data is secure and backed up.

"SalesFix was highly efficient and effective. It took under a month from the initial workshop to the proof of concept. Only a few tweaks were required, and the full 'go live' was available within four weeks.

"SalesFix was also extremely flexible in terms of our budget. They provided a list of outcomes for specific budgets, which gave us a gauge of what was immediately possible and what we had the capacity to do in the future. With their help we got the most important requirements right from the start," said Gibson.



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