



SalesFix

Q SHELTER DISCOVERS THE RIGHT CRM SYSTEM CAN MAKE ALL THE DIFFERENCE

KEY BENEFITS

SIMPLIFIED

Q Shelter struggled to maintain its database with an antiquated system that involved multiple spreadsheets and a high cost database subscription. SalesFix has helped to create a better and more efficient system for the organisation that is easy to learn and use.

SCALABLE

A key concern for Q Shelter was finding a new system that would help to support the organisation in the present and into the future. Salesforce's ability to scale means Q Shelter can grow and adapt as the needs of the business evolve.

ADAPTABLE

It was important Q Shelter find a CRM system that is sensitive to the specific needs of the business, and able to respond to changes in the business and personnel. By listening carefully to the client and providing extensive training and support, SalesFix has been able to deliver a system that directly answers the organisational requirements and can be effectively used by all staff, present and future.



"This could have been a really stressful process, but the SalesFix team kept it on track by communicating with us at all times and putting a real emphasis on good service."

- John Lysaught, Q Shelter Director

CLIENT

For more than 25 years, Q Shelter has been a vital force in supporting the community housing sector in Queensland, providing much-needed support to organisations assisting homeless and disadvantaged people across the state.

By working across a customer base made up of social housing providers and service providers for the homeless, this not-for-profit group has created a valuable network throughout the state that provides a better understanding of community housing needs and helps build the capacity of the sector.

THE SITUATION

Q Shelter experienced a significant and exciting change in January 2014, transitioning from a policy and advocacy body to an organisation that directly supports a range of community housing providers.

"The community housing sector was going through massive reform and Q Shelter needed to become a capacity building organisation rather than an advocacy and policy organisation," said Q Shelter Director John Lysaught. *"We needed to start providing a greater degree of customer service and to do it quickly – and we desperately needed a strong database system to help us manage a number of complex relationships"*



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THE CHALLENGE

Q Shelter has come a long way over the past 25 years but its customer database systems couldn't keep up. The Excel spreadsheets that – together with a legacy system called Chilli – had been sufficient in the past became cumbersome and ineffective. Q Shelter needed a new, efficient system that would meet all of the organisation's day-to-day needs.

"We needed an integrated system that would allow us to capture daily interaction with the people we help, as well as being able to provide meaningful reports for specific key performance indicators," Ann Earle said, who administers the Salesforce® program.

Another key requirement of the new system was "clean" data. *"It was essential that all client information would remain secure and that Q Shelter could evolve and grow as it moves forward into the future,"* John said.

"We wanted to develop an integrated system that could run our client management and marketing activities now, as well as scale alongside us into the future," he said. *"It didn't take us long to realise that Salesforce would be able to do all this and more."*

RESULTS

Q Shelter has come a long way in a short period of time. By making this crucial change to their data management system, they have made a dramatic and lasting improvement to how their service functions, which means they can now efficiently manage their client base and key stakeholders.

"Within a short time of starting to use Salesforce, our staff were seeing its capability and possible new ways to expand its use in the future," John said.

Importantly, the staff at Q Shelter has been enthusiastic about the system and the organisation has experienced an impressive 100% user adoption rate. This means data is being updated regularly, Salesforce is used for marketing campaigns and the organisation is running more smoothly than ever.

"The whole process has been much easier and more straightforward than you might expect, which has been great for the Q Shelter staff. New database systems can sometimes cause chaos in a business, but Salesforce and SalesFix made this a really smooth and positive transition," administrator Ann said.

"Our staff love the new system because it allows them to keep track of our clients far more easily," says John. *"The exciting thing is that we are also already seeing so many possibilities for ways for us to use this system in the future. The options are limitless."*



SHELTER
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THE APPROACH

First, the Q Shelter team reviewed their current systems and quickly realised that they were not up to scratch. They assessed options before realising that Salesforce was a perfect match for the organisation's needs.

"We sat down with SalesFix and gave them a detailed outline of what we needed and wanted," John said. *"The best thing is that they genuinely listened to us and took the time to work out what would be best for us. It felt like a tailored service and the communication was excellent every step of the way."*

THE IMPLEMENTATION

Implementation can often be the most difficult step of the process, but Salesforce.com® and SalesFix made it as smooth as possible by keeping in touch with Q Shelter every step of the way.

The Q Shelter team was in the loop and knew exactly what to expect in the future, which made the process *"an exciting step forward for the organisation, rather than a period of upheaval"*.

"Their customer service was of the highest quality: friendly, efficient and performance driven," John said. *"By the time we got to test drive the product using rough data, it dawned on me how carefully SalesFix had listened to our requirements and really understood our brief!"*

THE SALESFIX SOLUTION

SalesFix and Q Shelter decided to go for an integrated approach. They implemented Salesforce Sales Cloud, which helps with teams, along with Outlook for Salesforce so that email was connected seamlessly. They also installed MailChimp for Salesforce, so Q Shelter could get in touch easily with its community.

This solution is ideal for Q Shelter, as it allows the organisation to maintain and update customer information while allowing emails to be sent from within the database and via standard email, providing easy access to all the people who receive the newsletter and to Q Shelter members. *"It felt like they really took the time to get to know us and our organisation, which meant that the final solution was right for us,"* John said.



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