



SalesFix

TRANSFORMING DATA SILOS INTO INFORMATION FLOW

KEY BENEFITS

INTEGRATED

Volunteering QLD needed a CRM that could collect, link and maintain its volunteers' records. SalesFix customised Salesforce to integrate the right data to support Volunteering QLD's key business practices.

FUTURE-PROOF

With the help of SalesFix, Volunteering QLD has a future-proof CRM system and a corporate culture of continuous improvement.

EFFICIENT

Prior to SalesFix and Salesforce®, the systems were manual, resource-intensive and not suited to the changing nature of disasters. Volunteering QLD now has streamlined, accurate records that can be easily accessed anywhere, anytime and on any device.



“Thanks to Salesfix, we now have a customised Salesforce® system that meets our unique business needs. We can now visualise the long-term possibilities to proactively engage with our volunteers”

– Julie Molloy, Director - Social Engagement, Volunteering QLD.

CLIENT

Volunteering Queensland Inc. (Volunteering QLD) is the state's peak body for volunteering and a not-for-profit organisation. It aims to build volunteering numbers, help local communities with capacity building and advocate for a strong and sustainable volunteering sector. Volunteering QLD supports all types of volunteering organisations across the state, as well as individual volunteers.

To fulfil its vision, Volunteering QLD:

- engages and refers volunteers, including emergency volunteering
- builds community resilience and volunteer capacity, specifically through projects like its Step Up Program
- delivers professional development and nationally recognised training and assessment and is a Registered Training Organisation (RTO)
- works with academic partners and participates in academic research, and
- advocates for the Queensland volunteer sector, providing policy advice and support.

Effective stakeholder and volunteer engagement is crucial to Volunteering QLD's success. However, managing that process – especially during disasters - has not always been simple.



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THE CHALLENGE

In 2010-11, Queensland suffered a string of natural disasters, including floods and tropical cyclones. During this time, Volunteering QLD (and its Emergency Volunteering and Community Response to Extreme Weather (EV CREW) Service) was the organisation that community groups and all levels of government relied on to coordinate volunteers' offers of help.

Volunteering QLD's phone lines, website and email accounts went into overdrive and were inundated with people wanting to help. Volunteering QLD manually captured 120,000 offers of assistance using spreadsheets and a range of electronic solutions.

Although they had already introduced an online volunteer registration process for their Linkki volunteer referral service, Volunteering QLD knew they needed a more dynamic solution and a system that could:

- record the varying scale of volunteering interest during times of disaster
- capture relevant and consistent information about potential volunteers
- manage changing volunteer information, and reduce duplication of volunteer records.

Volunteering QLD needed a system that would let them access reliable and comprehensive data on volunteers before a crisis, during a natural disaster and in the aftermath. They needed a CRM that was mobile and could be accessed on multiple devices – be that desktop, tablet or smartphone.

During this peak demand, the Salesforce Foundation approached Volunteering QLD to offer their CRM system to capture these volunteers' data in one cloud-based location and better manage the range of information collected. Volunteering QLD quickly accepted this offer and implemented Salesforce®.

RESULTS

The results of working with SalesFix were immediate. Volunteering QLD can now produce linked and accurate data records. They have an intuitive, tailored CRM system which is responsive to their ongoing data needs and business practices.

Additionally, the long term benefits of SalesFix' advice has continued to be realised by Volunteering QLD. Using their customised version of Salesforce®, the organisation can now:

- track volunteer placements - meaning the team knows who has been sent where and what they've done, which is essential from a health and safety perspective;
- proactively engage with its potential volunteer workforce – which enables Volunteering QLD to build community resilience, educate on disaster readiness and communicate with the locals, *before* a crisis hits;
- review and filter volunteers' records – this allows Volunteering QLD to send the right people to locations where they are requested to help disaster affected communities; as well as to identifying specific skill sets and availability across the volunteer workforce; and
- Easily and efficiently produce comprehensive, real time statistical reports for client organisations.



“SalesFix listened very carefully to what our objectives were and what we wanted to be able to achieve with Salesforce. Without their support, we would not have been able, or had the confidence, to take the bigger steps. SalesFix and Salesforce.com are a huge part of our success story.”

– Julie Molloy, Director -
Social Engagement, Volunteering QLD.

THE SALESFIX SOLUTION

Although Salesforce® was providing great benefits to Volunteering QLD, the organisation needed assistance to truly unlock the potential. To achieve this, Volunteering QLD engaged SalesFix, a specialist partner in business improvement who had a vast knowledge of implementing, integrating and configuring Salesforce and related systems.

SalesFix really listened to Volunteering QLD's objectives, needs and vision. As a Salesforce Silver Alliance Partner, SalesFix understood to take them to the next level they needed to customise the system and build in business processes, workflows and automation. Through collaboration and communication, SalesFix configured Salesforce® to connect silos of data that had been previously captured and stored. The related lists within the system now 'talked' to each other and produced truly meaningful information and reports. Julie Molloy, Director - Social Engagement, said, *“From a reporting perspective, Salesfix has taken Volunteering QLD to a new level of efficiency and productivity. I have a dashboard that gives me up-to-date information in real time – it's amazing!”*

Salesfix also aligned the system's information flows to Volunteering QLD's key business processes. Rather than changing the business to suit the system, SalesFix ensured that Salesforce® was responsive to the unique needs of Volunteering QLD. *“Salesfix really listened! They provided us with a customised CRM to further help our volunteering communities,”* said Molloy.

SalesFix enabled Volunteering QLD to move forward in the collection and use of information; information that can be accessed anywhere and anytime, including on mobile devices, via cloud-based applications.

