



Customer Success Story

SalesFix and Ardoch



Every child's potential should be realised through full participation in education.

For 30 years, this has been Ardoch's mission and with SalesFix's help, they've now taken this impact into the future.

Using the power of Salesforce, they're now better equipped to mobilise their community and workplace volunteers to support schools and early childhood services.



Customer Success Summary

1500

Ardoch volunteers per year
will be managed through
Ardoch's Salesforce
Community

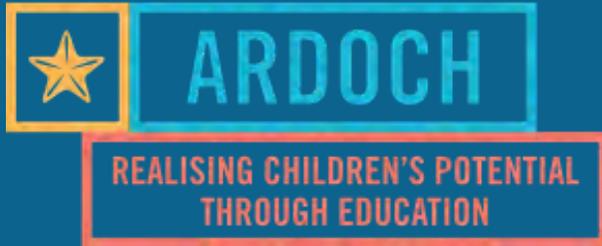
30+

Spreadsheets were previously
used to manage Ardoch
operations prior to their
Salesforce solution.

Solution

- NonProfit Success Pack (NPSP)
- Experience Cloud
- Volunteers4Salesforce
- InspirePlanner - project management
- Funraisin integration
- LearnTrac - LMS
- MailChimp

ABOUT



One in three children in Australia's most disadvantaged communities start school developmentally vulnerable and they continue to fall behind as they progress through school. Ardoch seeks to change this.

Ardoch is a children's education charity focused on improving educational outcomes for children and young people in disadvantaged communities.

Their 2025 vision is to become Australia's most impactful education partner supporting children in disadvantaged communities.

Reimagining the way work is done.



Ardoch has a complex ecosystem that works to deliver and manage the many different facets that come from working with children.

The way they were working was tedious and time consuming, and made it very difficult to consume information quickly and make informed decisions.

Ardoch's legacy system was fragmented, out of date and could not meet the needs of the organisation. Over 30 active spreadsheets were in use at any one time to help Ardoch track performance, compliance, contacts and communications. Obtaining good information required extensive effort. The multiple layers of spreadsheets did not allow for one view of their impact, and the fundraising systems in place hampered their efforts to improve donation income.

Reimagining the way work is done.



This way of working was not keeping up with their 2025 vision, so they set out to find a solution to reduce overheads, escalate efficiency and streamline operations to manage a large network of volunteers.

Ardoch's choice to engage with SalesFix was based on SalesFix's extensive experience and knowledge of delivering Salesforce to similar not-for-profits, and its alignment with Ardoch's organisational values.

To understand the complexity of their needs, SalesFix worked with Ardoch to clearly identify how they were currently working, what their outcomes needed to be and processes behind their current spreadsheets.

Reimagining the way
work is done.



Ultimately the structure was classified into the following requirements:

- Volunteer Community
- Recruiting
- Compliance
- Training
- Management
- Running Education Programs
- Managing Relationships – schools and early childhood learning centres
- Fundraising – to support programs and provide excellent supporter engagement

Reimagining the way work is done.



A team from both Ardoch and SalesFix was established and worked to understand Ardoch's needs to achieve the solution outcomes.

They agreed on working and delivery styles, and with all of the tech speak happening, developed an agreed language that worked well for all involved to increase user adoption and achieve the maximum potential from the project.

During the discovery process over 300 user stories were developed that were broken into epics, or groups, to ensure their initial requirements were accurately identified. It was important that agility was a constant for the way SalesFix and Ardoch worked together and they openly revisited the validity of these user stories to assess if they were still relevant as implementation unfolded.

The Ardoch team soon realised managing their work in Salesforce was going to be completely different to working with spreadsheets and were excited to increase efficiencies and reimagine the way they did things.



SalesFix

Discovery of better volunteer management

Ardoch recruits, trains and manages around 1500 volunteers every year. Volunteers are the heart that drives the organisation forward.

Before their Salesforce implementation, their Learning Management System was not integrated into any other Ardoch system. Once a volunteer had completed their required training for onboarding, the Ardoch team was notified by email and it was up to a team member to update the relevant spreadsheets to capture the right information.

Compliance, which is of the highest priority, also needed to be managed in this highly manual fashion. Police checks and Working with Children check approvals went through the same manual process. There were multiple volunteer types, based on the program in which they participated, and this, in turn, equated to five or more different application processes, all with different variations. The volunteer application and onboarding experience was not at the level Ardoch wanted.



Discovery of better volunteer management

Ardoch knows running a program is not a linear process; it involves many moving parts.

One benefit that no one anticipated was a change to how they managed the volunteer process. As part of their evolution to Salesforce, they were able to shift away from managing volunteers as “program specific” to categorising their volunteer roles into high compliance (for those with high levels of regular contact with children) and standard compliance (for all other roles).

This reduced the application process down to just two types, and with their self-managed application forms that maps all volunteer information into Salesforce, Ardoch have significantly increased their efficiency.



Discovery of better volunteer management

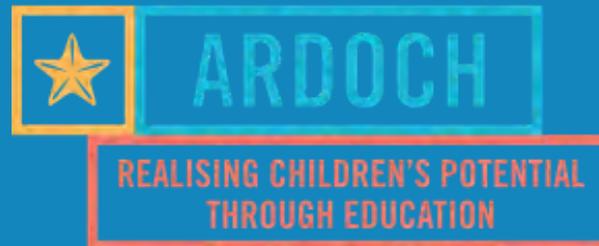
The launch of Ardoch's Salesforce community will be a game changer for staff and volunteers alike.

And whilst it is early days, they are proud of their outstanding volunteer onboarding experience. Volunteers have a clear picture of their details and information in the Ardoch community, do their training through an integrated LMS, register for optional professional development events, log their volunteer hours in real time, and update their contact details and other relevant information.

The Ardoch team now has a clear picture of each volunteer and their journey through the onboarding process and throughout their volunteering.



After the launch of Ardoch's Salesforce community, the staff and their volunteers spend less time on tedious paperwork and more time mobilised into classrooms making a difference.



Smarter Fundraising



Whilst a lot of their funding comes from program grants and sponsorship, Ardoch still relies on the support of their donor community to make their programs a success.

From hands-on literacy and numeracy support, quality STEM learning equipment and training, to programs that inspire confidence and a love of learning, they needed to improve their fundraising processes to secure Ardoch's future.

Their legacy fundraising architecture was a combination of DonMan to capture donor records and MyCause to raise their much needed funds.

With the implementation of Salesforce, Ardoch now has a single view of each of their donors and their team can be more proactive in their fundraising efforts. The system allows for better record keeping, more efficient donation processing and a smoother donor journey.

Better experiences mean better outcomes for Ardoch



Through their journey to uncomplicated and efficient outcomes, Ardoch has been very clear on what they ultimately wanted to achieve.

Along with their 2025 vision to become Australia's most impactful education partner supporting children in disadvantaged communities, they want to engage with all people involved in their organisation on a more meaningful level.

The ability to see that a volunteer has been with Ardoch for ten years or a donor has given continuously for the last year is of the most importance. They now have the right information to form and keep good relationships with those involved with their organisation.

These better experiences mean better outcomes, great word of mouth and a stronger reputation to uplift their cause.



SalesFix

If you would like to chat about
how we can help your organisation
Accelerate Change and Create Results

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