



Customer Success Story

SalesFix and ADACAS



For the ACT Disability, Aged and Carer Advocacy Service (ADACAS), efficiency is paramount.

ADACAS needed a new case management system to manage funding data and help its team do better work, faster.

SalesFix provided the solution.



About



ADACAS is a non-profit service delivery organisation that provides free advocacy support, information and specialised services to clients in the ACT, across the South Coast and in regional NSW.

But an expanding team of advocates and numerous funding streams mean that there's often a lot of information for ADACAS to manage – and it required a system that provided a solution to its scaling requirements.

Enter Salesforce implementation partner SalesFix, which provided the technical know-how to establish Salesforce as ADACAS' go-to tool for managing reams of client data and discrete funding streams.

The Salesforce solution has helped ADACAS improve the quality of its service offering – here's how.



Getting up to speed

When Carolyn Murphy, Business Manager at ADACAS, joined the organisation in mid-2021, it was undergoing a period of rapid change.

Not only had it experienced a 50 per cent increase in staff, there were multiple new funding programs coming in through the door.

The previous case management system, which was server-based, had suited the needs of the organisation for a decade. Moving forwards, however, with the ongoing expansion of their services and staff, ADACAS required a system that could offer flexibility and scalability.





Getting up to speed

With their team of advocates often managing dozens of clients at any given time, ADACAS realised that moving to Salesforce would provide a more reliable and efficient way of managing client data.

And as a non-profit, ADACAS receives funding from a variety of sources, including regional and federal government bodies, which means compiling a great deal of information from disparate sources in a single location.

“They all have different funding requirements,” Carolyn says. “It’s about getting that right so we can draw out the necessary reports to match the funding.”

By implementing Salesforce for ADACAS, SalesFix has facilitated the improvement of administrative practices – and ADACAS staff are loving it.

SalesFix's implementation of a client-centred case management solution has enabled ADACAS to easily take a snapshot of client information and identify additional services that could be beneficial for those clients.



SalesFix

The SalesFix solution

“I’ve worked with Salesforce and other similar systems for over a decade,” James Cowley, Executive Officer at ADACAS, says. “One thing that Salesforce is very good at is giving a summary of previous cases, and you can get a holistic view of the client – an easy snapshot that gives a more informed approach.”

ADACAS now has the flexibility to add additional fields in Salesforce to collect the right data for their different funding streams. It can, for example, record the amount of time spent on a particular case and access client statistics such as age, gender and location.

Efficiency has leapt, James says.



The SalesFix solution

“Implementation has helped with data input efficiency, as well as data output and data analysis, leading to more informed decision making and trust in our data. We now have complete flexibility to adapt to and be nimble in a changing environment.”

As for the second element – managing funding – Carolyn’s appraisal is similarly upbeat. “We have the ability to draw out performance reports at any time to see how our funding programs are going,” she says.

The organisation now has the ability to identify key focus areas where clients require the most support – based on geography or demography, for example – and build awareness of funding streams among their clients and communities.



“[Some systems are] like a secret box,” says James. “The owner of that box has got the key, but nobody else can go into that box without their permission.”

“With Salesforce, you're handed the box and you're handed the keys, so you're actually empowered to take control of the system. You can make changes rapidly and work dynamically with the changes that you see within the business.”



Next Steps



Carolyn and James agree that Salesforce has done wonders for their organisation and empowered their team.

With the Salesforce solution now firmly in place at ADACAS, the team has discussed directions for future integration with the organisation's systems.

These include possible integration with Xero for improved finance management and to the ADACAS website to streamline the referrals process.

The possibilities Salesforce presents are endless, says James.

“Once you've got the underlying fundamentals in place, you can scale things a lot more quickly and easily,” he says. “There are no real limits.”



SalesFix

Learn how SalesFix can provide a case management solution at your organisation.

Contact the team today.

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