

## DISABILITY ADVOCACY NSW

Disability Advocacy New South Wales (DA NSW) supports people with disability to help them know their rights, sort out issues, and be fully included in the community.

### A vision to enhance client outcomes and staff wellbeing through technology

- Service demand was extremely high. Books were closed for an average of 6 months each year with case resolution often extending out to 5-6 months. DA NSW wanted to soften and personalise client support, while leaning on technology to assist in reducing the waitlist and resolution timeline for better client outcomes.
- The data and case management system was static and unable to deliver usable information back out for analysis, reporting or oversight. Digital capability enhancement for the organisation was paramount.
- Staff workflows were disjointed making it difficult for supervisors to see areas of need or assist with burdens.
- Needed a solution that could grow with them while accommodating any future changes to client support needs or reporting requirements.

*"We had low quality data and couldn't support people in the client-centred manner we wanted to. It was causing quite a lot of distress for our staff."*

Amanda Brickwood | Executive Officer

### Background

- Managing a client base of over 30,000
- Services ⅔ of NSW

### Challenges

- Long waitlist for service detrimental to client outcomes
- Case management not optimised
- Staff workflows disjointed
- Reporting challenging with low visibility

### Outcomes

- Every client can now be helped
- Case resolution achieved in half the time
- Staff morale at a high
- Accurate forecasting and easy reporting
- Room for growth

## Addressing case management from all angles

- The strategy focused on improving client outcomes via streamlining and customisation of staff workflows. With a clear view of the data required for internal and external reporting, work began on a custom solution with built-in workflows to guide staff and clients through the advocacy process. This reduced friction for existing staff and had the added benefit of improving onboarding for new hires and training.
- A particular requirement was SMS/texting functionality. The client base was much less likely to have a private computer/internet access than a mobile phone. This helped to speed up response times and case progression through easier consent for case progression.
- Case management was set up with transparency across the client journey from open to close. This gave greater oversight for supervisors allowing them to provide support and advice to move stalled cases.
- Automation was built in for documents and surveys (including risk assessments and reporting requirements), allowing comprehensive data collection and client sign off to occur quickly and efficiently with less downtime.
- Training was delivered to all staff via a 2-day session during their annual conference.
- The transition to Salesforce was well-planned with downtime limited to 1 weekend for the data migration process.
- The initial implementation took just under 7 months split over 7 x 2 sprints.

## No longer needing to turn people away

- Across all service regions and 8 teams, DA NSW has short, manageable waitlists and are able to help every client that comes to them in a person-centred, client-directed manner.
- The client journey to a good resolution is now less than 70 days (previously 5-6 months) with an average advocacy support time of 15 hours. Clients are empowered to manage their goals with maximum support.
- Staff feel supported by the systems and workflows and are thriving with less admin and more time to advocate for and support clients. Morale has improved as they no longer need to turn people away while checkpoints and communication options built into the system allow them support and to share the burden of difficult cases as well as reducing email load.
- Reporting is easier and faster. With the system able to prompt/report on data capture, quality is easier to monitor and validate, with pre-checks and visibility. Managers can review progress with 1 click dashboards to get ahead of potential issues, forecast, plan and track progress toward objectives in real time.

*"We've changed our processes at the same time as building in this new technology. One couldn't happen without the other. Technology is helping deliver the ideal outcome for both staff and our clients. I'm extremely happy with the process."*

Amanda Brickwood | Executive Officer

## Customer Solution

### SALESFORCE SERVICE CLOUD

- Email to case / Case auto assignment by individual client with linked history / Case notification and progress updates / Flow Automation / Reporting dashboards

### SMS-MAGIC (3rd party integration)

- Advocate to client / Client to advocate / SMS to case / Case notification

### FORMSTACK (3rd party integration)

- Products: Forms, Documents, Sign / Web to case / Case management / Case workflow automation

### SURVEY SPARROW (3rd party integration)

- Case management / Case workflow automation / Feedback and outcomes



## Looking Ahead

Over the last 3 years, DA NSW has continued to improve its Salesforce solution with SalesFix as its integration partner. Current projects in development include Salesforce's Einstein AI integration and a portal for clients to be more involved with directing their own cases.

## Other Use Cases

A scalable solution such as this is ideal for client outcome centred service-based businesses focused on advocacy, as well as those looking to smooth the technology interface for staff, foster easy communication with clients, and meet internal and external reporting requirements.