

## THE GEORGE INSTITUTE

The George Institute is an independent global medical research institute established in Sydney in 1999 with major centres in Australia, China, India and the UK. The organisation produces innovative research to help governments, organisations and people make evidence-based decisions on how best to improve systems and the delivery of health care around the globe. The focus is on underserved communities and the prevention and treatment of non-communicable disease and injury.

### Customer Success with Managed Services

#### THINGS JUST DIDN'T MAKE SENSE

- The George Institute's Salesforce account manager recommended SalesFix due to its history of delivering efficient and highly suitable solutions for organisations working with funding, philanthropy and with deep requirements for contact details.
- The organisation's Philanthropy team is small but mighty, with the responsibility to draw in funders to further The George Institute's research and community initiatives. While the Institute has Salesforce available across the entire organisation, it's not being used to its full potential partly due to what could be considered an intimidating array of functions and partly due to reluctance to switch from outdated but comfortable software like Microsoft Excel.
- The team was unfamiliar with Salesforce and needed the solution to be simple and easy to navigate to reinforce usage and ensure full uptake.
- Pipelines were difficult to visualise and there was an opportunity for reporting to be improved through data cleansing, filters highlighting opportunities and dashboards showing KPI progress.

### Filling the gaps and bringing everything together

- The George Institute's vision is to embed usage with all teams in the future. SalesFix's initial work has been focused on processes and reporting capabilities that take advantage of powerful Salesforce features that help the Philanthropy team work efficiently while providing support for future planning and decision making for the Board and Executive teams.
- Data and contacts within Salesforce were cleansed, validated and categorised via integration with a 3rd party tool called Wealth Scan. Through this process custom dashboards could now be developed to showcase opportunities for reporting into the Finance department. Pipelines showing funding projections were also created for the Board and Executive team.
- With excellent data, Salesforce Campaigns is now in use as an event management system. Invite lists, RSVP lists and event webpages are all hosted in Salesforce and staff can see contact engagement with their campaigns in each person's record.

#### Support Level = Plus

##### Organisation Background

- Partnerships and projects in 45 countries
- +700 people globally
- +20 years of service

##### Reasoning for adding support

- Lack of internal expertise
- Custom requirements

##### Support Initiatives

- Pipeline visualisation
- Trends and opportunities
- Automated reporting capabilities
- Campaign management

##### Outcomes

- Streamlined workflows
- Easy data interpretation
- Experts in their corner

## Filling the gaps and bringing everything together - continued

- The George Institute has fortnightly meetings with SalesFix Customer Success Representatives, tracking progress on projects and support initiatives via Asana and email. Their internal Salesforce expert is supported with ongoing ad hoc training and advice as required. The Institute can relay quarterly updates regarding major projects to the SalesFix team and know that knowledge will be put to use and implemented in ongoing work.
- SalesFix solution: Salesforce Nonprofit Success Pack, MoveData, Payments2Us, Declarative Lookup Rollup Summaries Tool, Cloudingo

## Responsive, all in one place and easy to evolve

- The Philanthropy team is excited about the possibilities available via their ongoing partnership with SalesFix. As staff become more familiar with Salesforce they expect to incrementally and harmoniously upgrade, tweak and grow their utilisation of the platform and lean on SalesFix as a trusted expert with The George Institute's best interests at the forefront.
- With processes and workflows smoothed and all their work in one place, work feels streamlined. Data is much easier to interpret and use, lending more nuanced insights and heightening decision making.
- Strong communication on both sides means projects are never stagnant, progress is transparent and all questions answered. When The George Institute was scoping a new fundraising platform, a SalesFix Customer Success team member stepped in to manage and implement the transition on their behalf and ensure appropriate and successful integration.

*"I don't think you're ever finished, there are so many things you can tweak, upgrade and change with Salesforce as you grow. Having an ongoing partnership like we do with SalesFix is really important. They are the Salesforce experts and have what you need as a team at the forefront of everything."*

Stephanie Keegan | Philanthropy Operations Officer, The George Institute

With solid trust in their data, greater oversight into funding and pipelines and increasing confidence in Salesforce capability and function, The George Institute can more effectively deliver research and findings that improve the health and lives of underserved communities around the world.

## Ongoing relationship notes

The George Institute has been a SalesFix client since 2023. Possible future initiatives include more comprehensive event and account management and the expansion of marketing capabilities.