



VERTIC

SALESFORCE CAPABILITY STATEMENT

AUGUST 26, 2019

This proposal has been proudly prepared by **Vertic Pty Ltd** for **Vertic**.

STATEMENT OF COMMITMENT

Vertic is committed to quality, honesty, and a continuous quest for ensuring nonprofit organisations can improve their operational and strategic ambitions.

This is our commitment to quality, endeavour, effort, attention to detail, honesty, professionalism and to act in the best interests of Vertic throughout an implementation with Vertic.



Jan Tenenberg, Director



Stephen Kent, Director

OUR HISTORICAL SNAPSHOT

We are focused exclusively on working within the nonprofit sector to make sure we have the knowledge, experience, and solution components to support your strategic objectives.

WE GOT STARTED

Working at a large consulting firm at the time, we saw an opportunity to change the approach to consulting to be more focused on value and delivery rather than commercial contracts and legal compliance. We wanted to engage differently, based on positive human interactions, and have stuck to this principal ever since.

FIRST \$1MILLION FUNDRAISED

A very proud moment in our history is when we had the privilege to work with Good Friday Appeal to raise money for the Melbourne Royal Children's Hospital. This was also the first time our fundraising and payment solutions raised over \$1 million in a single day, in fact we helped this team raise over \$18 million which brought us enormous pride.

INTERNATIONAL SALESFORCE.ORG ACCREDITATION

We have been able to achieve international [Salesforce.org Impact Partner](#) accreditation, the only partner in Australia to do so, based on staff certifications and client project satisfaction ratings over time.

LARGE IMPLEMENTATION EXPERIENCE

We have come a long way since starting on a vision of providing consulting services with a real human element and focus on quality digital solutions rather than complex contracts and legal processes. We are now very privileged to work with some of the most significant nonprofit organisations in Australia and New Zealand, such as Beyond Blue, RSPCA New South Wales & South Australia, Greenpeace, Blind Foundation, Good Friday Appeal, Australian Volunteers International, Kids Under Cover, Westpac Foundation, and Connecting Families.

INTERNATIONAL DELIVERY SUCCESS

We have and are currently delivering a number of successful projects internationally, including in New Zealand and Hong Kong. We have geared ourselves to deliver either in person or for geographically disconnected teams across multiple locations.

OUR BELIEF SYSTEM

We challenge convention in everything we do. We want to re-define consulting to be inclusive, responsive, and enjoyable for our clients. We believe that an enjoyable journey is a productive journey and will ultimately result in a more relevant, intelligent, and effective outcome.

VERTIC'S IMPLEMENTATION APPROACH

We believe that software solutions consist of two essential elements; the "What" and the "How". The "What" refers to the underlying data model that drives the solution; these are objects, attributes, and relationships that reflect your organisation's data needs. The "How" describes system processes, workflows, notifications, and automation of actions. We have further described our beliefs in this approach within the [The Importance of Data Centricity](#) section.

AGILE VERSUS WATERFALL METHODOLOGIES

We believe that traditional waterfall methodologies provide the consumer safety and security over scope and pricing, as this is defined at the beginning of the implementation. These methods, however, also restrict the capability of benefiting from the consistent improvements to the underlying digital platforms.

As the scope and solution definition is locked in, clients are not able to take advantage of new features, new requirements, or new learnings for inclusion into the software solution. We have created a project delivery methodology that combines the security of scope definition (and therefore cost) with the flexibility and responsiveness of agile methodologies.

In addition to this, we invest the majority of our efforts into a working system (rather than a heavy focus on documentation) to allow your users and stakeholders to "touch and feel" your new solution as quickly and regularly as possible.

THE "BUILDING A HOUSE" ANALOGY

As described above, we focus initially on defining (and asking you to formally approve) your organisational data model and therefore creating a boundary around the overall project scope. We would like to equate this to building a house to "lockup" stage where the foundation, frames, walls, and roof have been constructed and the rooms defined.

When combined with our ideas around providing you with working systems along the way, this means you could "walk through your house and view it" but not yet live in it.

OUR SOCIAL MISSION

We have a strong belief in being part of a movement that ensures all people in Australia and New Zealand live in a safe, socially supportive, and prosperous environment. We do this by providing intelligent, relevant, and cost-effective digital solutions to the social sector.

We have been privileged enough to be involved in organisations addressing issues relating to mental health and anxiety, youth homelessness, children's health, spinal cord injuries, as well as veteran support. On a more personal note, we want to ensure that our children are secure growing up and are primarily free of concern.

Working with Vertic would be a significant opportunity for us to further align our work to our social mission whilst ensuring that Vertic receives a digital solution that represents value, improvement on its current systems, as well as a platform that is engaging and fun to use.

INCLUSIVE AGILE & HUMAN-FOCUSED DELIVERY

We believe that implementation success can only be achieved when combining the best technology available with the needs and cultural alignment of the people involved. Vertic's approach is inclusive and responsive to our client's needs and ways of working.

Your team's involvement is not only encouraged, but we believe it is critical to the overall relevance of the delivered solution as well as the adoption of the platform within your organisation.

Once engaged, we quickly form a cohesive team with your stakeholders, technical staff, and executive to ensure that a single vision is followed and the required governance structures are in place to oversee the project.

OUR CONSULTING TEAM



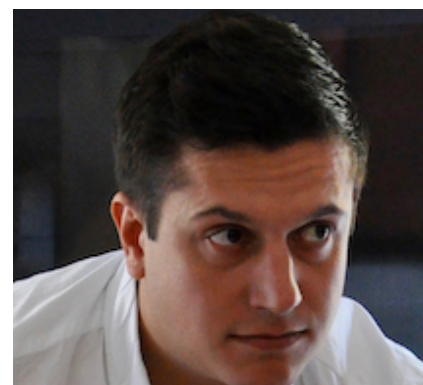
JAN TENENBERG 
FOUNDER & STRATEGY

Jan is a highly experienced professional who specialises in effective implementation methodologies and founded Vertic on the belief that consulting firms should be human-centric.



STEPHEN KENT 
FOUNDER & DELIVERY

Stephen has lead many of Vertic's large transformations since founding the firm on the motivation of building sustainable and intelligent digital solutions using the Salesforce platform.



MATT ROMEO 
PARTNER & SOLUTIONS

Matt has been involved in the nonprofit sector for many years and is a fully Salesforce accredited functional consultant who specialises in technical solution design for our clients.



ALEX HUGHES 
PRINCIPAL CONSULTANT

Alex has found his specialisation in the development of complex Salesforce processes and online portals. He continues to lead many of our Salesforce Communities projects across all our clients.



JO REGEV 
PRINCIPAL CONSULTANT

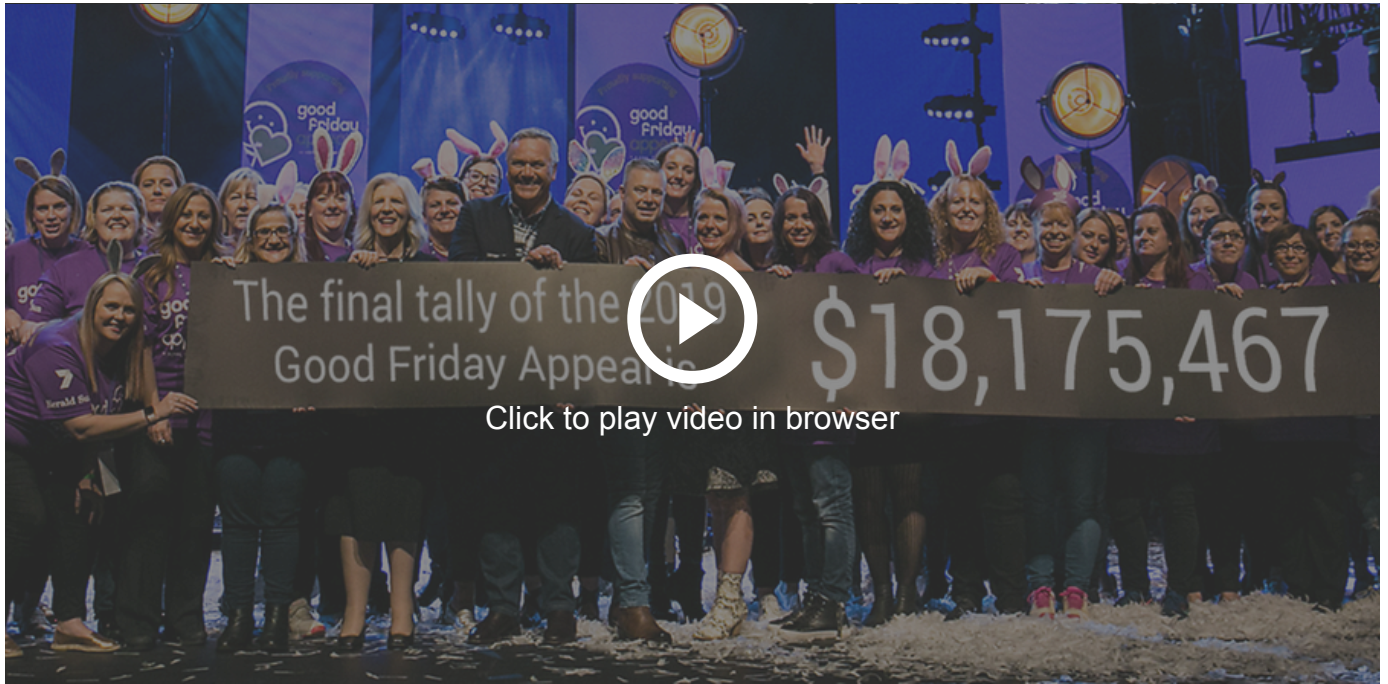
Jo has been delivering software projects for many years and is managing multiple large fundraising and volunteering deliveries for Vertic, including fantastic clients in New Zealand and Australia.



JOSH AIZIK 
TECHNICAL CONSULTANT

Josh joined Vertic as a junior consultant and is now involved in the many of the technical component configurations of the Salesforce platform across many clients and projects. This includes workflows, processes, and security profiles.

Good Friday Appeal



GOOD FRIDAY APPEAL

The Good Friday Appeal of Victoria raises money for the [Royal Children's Hospital](#) with the main fundraising event being conducted on Good Friday each year. In addition to a significant online fundraising campaign, this day also features a number of physical activities, such as children's activities, live music, Channel 7 broadcast, as well as a televised residential home auction.

OUR SOLUTION

Vertic was engaged to develop a complete fundraising and volunteer solution built on the Salesforce platform. We architected a technical environment that included [Braintree](#) (payment gateway), [Amazon Web Services](#), as well as Salesforce Communities as the primary volunteer management and self-service solution.

RESULTS

On Good Friday, the team used a purpose-built Salesforce solution to check volunteers into their assigned shifts, conduct the safety and health checks online, as well as connect with donors and take payment over the phone.

In total, we were privileged to assist Good Friday Appeal in raising over **\$18million** in donations via all channels and managed over 300 volunteers on the day using our solutions built on the Salesforce digital platform.

"Vertic Pty Ltd was fantastic to work with and we feel they have taken us into the 21st century."

- Anne Randall, Managing Director

Baptcare Victoria



PROJECT OVERVIEW

Vertic is currently engaging with Baptcare VIC to deliver a solution that supports the organisations Customer Enquiries Centre (CEC). The solution leverages the Salesforce Service Cloud to provide a sophisticated Enquiry Management Module, which is broadly geared towards:

- Excellent service delivery standards for customers
- A high-level user experience for the CEC Team and others who use the platform
- Visibility that allows managers greater control of business outcomes.
- A platform that provides the organisation with the ability to easily evolve its enquiry processes.
- Empowering the marketing team with meaningful analytics to drive growth.

More specifically, we've taken a highly extensible platform (Salesforce) and configured much of the standard out-of-the-box functionality, including - Case Details, Case Views, Case Queues, Case Escalations, Workflows, Knowledge Management, etc. to meet Baptcares' specific business requirements.

Spinal Cord Injury Australia



PROJECT OVERVIEW

Vertic has partnered with Spinal Cord Injuries Australia (SCIA) since 2016, working closely with the Customer Connect, Client Services, Marketing and Fundraising teams to identify areas of the organisation that can be better supported by digital solutions. Using Salesforce, we have created a platform that has allowed SCIA to launch their organisation into the future with the ability to rapidly enhance using leading technologies and the versatility required to re-align with industry standards whenever required.

Our initial engagement with SCIA focused on extending Salesforce to support the Customer Connect and Service Delivery teams with robust data entry processes to ensure that the information accessible for customers will support more meaningful engagements and lead to a greater customer service experience. Since this initial implementation we have worked with SCIA to further refine and support these processes. We have also extended the Salesforce implementation to support a range of other processes and departments, including: Scheduling, Events, Marketing, Fundraising, NDIS, and Finance & Invoicing.

We consider it a great privilege to be in a position where we can have a positive impact on the lives of individuals who have encountered serious injury. We very much look forward to continuing our journey with SCIA a long way into the future with the objective being measured implementations based on customer focused outcomes and return on investment which will allow SCIA to advance their organisation and ultimately have a progressive influence on the lives of their customers.

Greenpeace Australia



PROJECT OVERVIEW

We have been engaged with Greenpeace Australia to deliver an organisational fundraising and telemarketing solution, built on the Salesforce digital platform. Greenpeace Australia take donations only from individuals and have a large number of regular givers, so building a solution that scales well (to over 3.5 mil supporter records) was critical to the success of this implementation.

The technical solution utilises [Stripe](#) as the primary payment gateway to process a range of payment methods, including credit cards, direct debit, cheque, and cash. A number of transaction failure retry mechanisms have been developed as well as a fully automated receipting framework.

In addition to the fundraising features, we have been engaged to deliver Greenpeace's telemarketing processes using the Salesforce platform.

This includes segmenting & generating agency lead files as well as automating the processing of outcomes from various agencies. We have utilised Salesforce Flows to fully automate the importing and record processing capabilities of the telemarketing team, including the ability to configure all required mappings over time without the need for complex IT involvement.

This will ultimately reduce a significant amount of manual time and allow these guys to focus on their core mission to advocate and create meaningful policy for the environment.

DELIVERY METHODOLOGY

INTRODUCTION

Vertic follows an agile-based implementation process but we retain some of the more traditional methods of project management, including formal status reporting, risk management, and solution verification.

In the initial stages of any implementation, we focus primarily on determining your organisational data model, as we strongly believe this will form the foundation for the solution long term. We iterate as long as required to establish intelligent and workable data relationships upon which your system will be developed.

Once agreed to by all stakeholders, we structure the implementation into a set of sprints (typically 4 week duration) to deliver various business functions; whilst traditional approached will prioritise sprints by either value or required effort, we tend to organise sprints by the level of difficulty to implement a specific set of functions. The reasoning for this is to allow as much time as possible to "solve" the technically hardest parts of the project. We overlay this prioritisation with the internal value, as seen by project stakeholders.

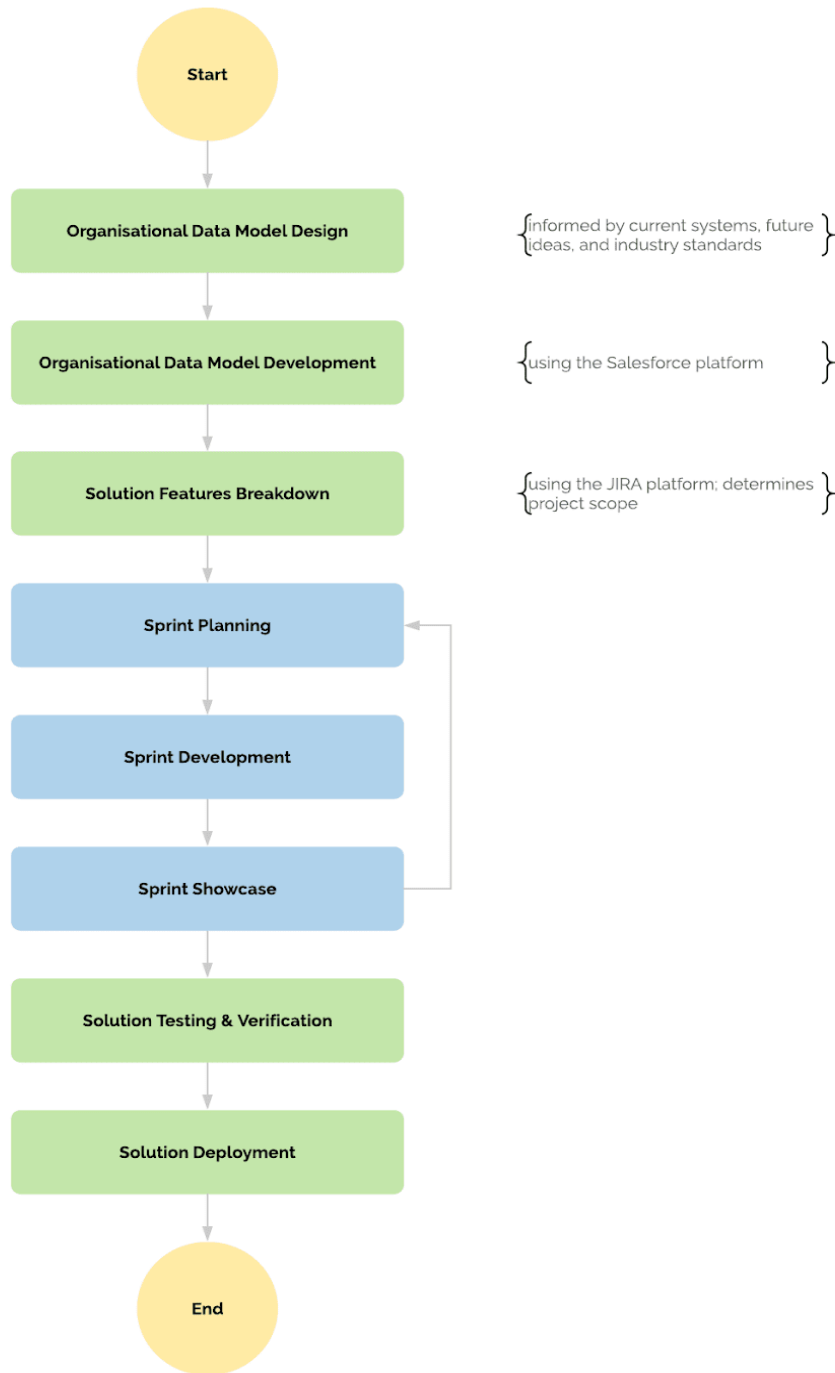
At the conclusion of each sprint, your stakeholders will be part of a showcase to socialise the developed solution as well as have access to a working system that can be "played with" at no risk to ongoing development. This starts the change management and training process informally but plays an important role in getting people on board with the journey.

We are open to discussing multiple production releases, although there are advantages and disadvantages to having multiple releases, include having to run multiple systems (whilst the new solution is not yet fully developed), conduct data migration multiple times, and having users operate multiple systems. These challenges can be overcome, of course, but we would like to discuss this with you further.

In the end, all software implementations are about people and whilst everything we outlined to you above is important, we focus on the human element with more attention than any other part of the implementation structure. This includes keeping stakeholders up to date, showcasing work, making people feel comfortable with the changes being introduced, etc.

PROJECT MANAGEMENT APPROACH

Our implementation methodology has been informed by a number of formal methodologies (such as [PMBOK®](#), [Feature Driven Development](#), and [Prince2®](#)) as well as our "common-sense" learnings from many solution deliveries over our time, particularly within the social sector, as shown below.



ORGANISATIONAL INFORMATION MODEL DESIGN

We have a deep belief that your organisational data structures are the foundation of success and form the most critical component of your future-state solution; as such we don't constrain the design and development of this data model by time or number of iterations within our implementations.

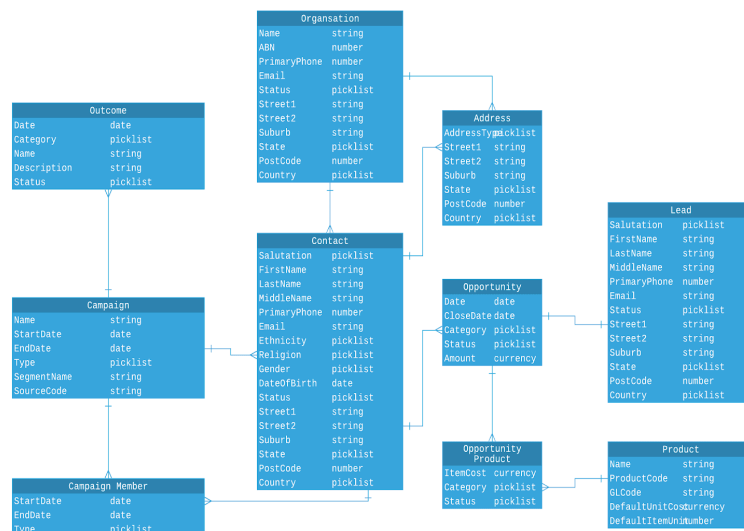
This data model analysis is informed by key systems and business processes that have a direct impact on the way data will be managed. Whilst an underlying technical data model will ultimately be implemented, during this initial step we are focused on understanding the relational structures of all organisational data being managed as well as key relationships within the organisation.

DEVELOP ORGANISATIONAL INFORMATION MODEL

As the ultimate success of any solution implementation is user adoption, a parallel working stream to develop a working version using Salesforce is established whilst the organisational information model is being designed. This enables the opportunity for key business stakeholders to “touch and feel” the solution and evolve it over time in a real environment rather than simply within a specification document.

As part of Vertic's implementation approach, end user access is provided to key stakeholders to Salesforce and afforded the opportunity to enter current-state data to evaluate the future-state information model; using this approach presents the most thorough review process of a design possible.

An example of an organisational model is shown here:



SOLUTION FEATURE BREAKDOWN

Once the organisational data model has been finalised (at least conceptually), we develop a set of user stories (with your team) to reflect the scope and end-state of the project. User stories are “told” in terms of the persona executing the system function, for example “An email must be sent to the customer and tracked in the system”.

All user stories are submitted to & managed through the JIRA platform which allows us to build up a backlog of the entire project delivery; this forms the basis for ongoing sprint planning sessions.

SPRINT PLANNING & DEVELOPMENT

Within each sprint (which are typically 4 weeks in duration), we engage directly with your project team to plan the sprint; this essentially means that we organise the backlog into a number of logical sprints (usually prioritised by complexity of task and value to your organisation).

Every sprint will be developed in accordance with this planning and, at the conclusion, we conduct a detailed showcase of all achievements within any particular sprint.

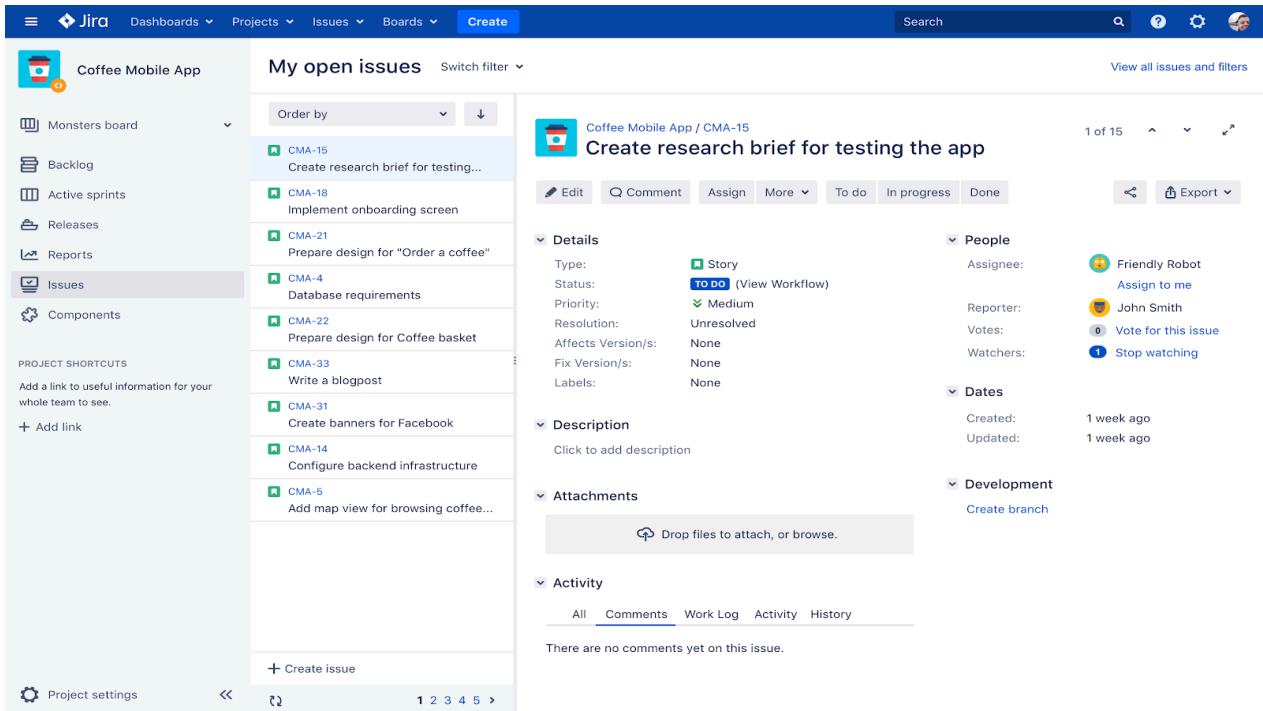
SOLUTION TESTING & VERIFICATION

The completion of all development sprints represents the conclusion of all formal development activities and leads into the opportunity for your stakeholders to formally test and verify that the solution meets the agreed-to design and functions.

We support your user acceptance testing by providing advice, feedback, and defect resolution alongside your team's execution of all relevant and required testing processes.

JIRA AND SPRINT PLANNING

Our primary tool to manage work packages throughout your journey is [Jira](#). This platform offers the capability to build a set of “user stories” that reflect the requirements of a particular feature; further to this, your stakeholders have direct access to progress, design, work allocation, and priorities by logging into Jira, as shown in the below screenshot.



Our lead consultant will conduct monthly sprint planning sessions with your team to ensure that, within any given month, your priorities are being met.

REGULAR STATUS REPORTING

We issue regular and agreed-to implementation status reports to your stakeholder to keep you informed and flag any potential issues, risks, and actions for the reporting period. Status reports are intentionally kept short (typically 1-2 pages) and are marked as Green, Orange, or Red depending on the level of progress and perceived risk.

WHY IS DATA CENTRICITY KEY

We believe very much in the importance of data and its value to your organisation. In fact, apart from your people (Vertic team and supporters), we believe this is the single most important asset you have.

We believe that software solutions consist of two essential elements; the "What" and the "How". The "What" refers to the underlying data model that drives the solution; these are entities (or data tables), attributes, and relationships that reflect your organisation's data needs. The "How" describes system processes, workflows, notifications, and automation of actions.

Whilst the definition of your organisation's system and business processes is critical to the success of any delivery, our approach is to initially focus on the data model and its accuracy and endorsement from your stakeholders. We do this because we believe that a precise data model will drive every behaviour of your future-state software solution; this includes reporting, analytics, integration, as well as automated processes.

To explain this further, we would like to take you back to more traditional approaches to implementing complex software systems. This has always included asking a Business Analyst to fully understand and document your current-state business processes across all your business functions and then working through a process of optimising these processes into a set of future-state functions.

Whilst we believe there is value in this, we know that your business process is ever-evolving and will, without any doubt, change over time. With the acceptance of this premise, we believe in building your digital landscape primarily based on your organisational data requirements with a secondary focus on enabling your business processes.

We have learned over many years when system and business processes change, existing IT solutions are usually the first victims of this change. They will either be "left behind" and become irrelevant, changed at significant ongoing cost, or your team might even start introducing peripheral systems to compensate for the lack of suitability of existing systems.

Combining more traditional methods of implementation with the flexibility of agile processes ensures that our clients drive the most achievable business outcomes possible from their investments. We believe very much in the importance of data and its value to your organisation. In fact, apart from your people (Vertic team and supporters), we believe this is the single most important asset you have.

PLATFORM VS APPLICATION

Having discussed the validity of a platform-driven architectural approach previously, this section outlines the key advantages of using the Salesforce platform to do so.

HORIZONTAL VERSUS SPECIALISED CAPABILITY

Salesforce offers the largest horizontal feature set available in a CRM platform available today, including native functions for contact, case, organisation, sales, marketing, and service management. In preference of providing a deep set of features for a specific purpose (such as exclusively case management) to the exclusion of everything else, Salesforce offers a wide set of functions and allows for the expansion of all components of its platform; this includes introducing new functions natively within the platform. It is this ability to evolve over time within a single platform that puts Salesforce at the advantage over vertical applications (or even smaller and more specialised platforms).

HIGHLY INTEGRATED NATIVELY

Salesforce is the most natively integrated platform available in the market; this means that most software solutions your organisation is likely to select as part of its enterprise architecture will most likely be integrated with the Salesforce platform. We view this as a huge advantage in developing a sustainable digital strategy and minimise complex and highly-risky integrations.

POWERFUL REPORTING FRAMEWORK

A powerful reporting and dashboard development framework sits at the foundation of the Salesforce platform. Everything that is developed, configured, and structured within the platform (either by Salesforce natively or Vertic as part of the implementation) has intelligent and relevant reporting availability at its core objective (enabled by a single source of truth).

TECHNOLOGY SELECTION

The right technology selection strategy will ultimately determine whether the proposed transformation is successful or potentially compromise your future-state application architecture and therefore your organisation's ability to remain responsive to change.

To us, there are two fundamental approaches to technology selection. The first aims to select the “best of breed” solutions for each functional component (such as Finance or Human Resource Management) and then integrate all selected solutions to form a cohesive architecture in which your team can be productive.

The second approach focuses on making a single key decision as the central component of your future-state architecture and then determine a range of systems that are most integrated into this central component whilst also delivering the required functions. This strategy focuses on minimising complex integrations whilst potentially trading some desired (rather than required) features for this ease.

We have seen patterns occur with both of these approaches with the first one more likely to yield an application architecture when compared to the second approach which results, more often than not, in a platform-driven architecture.

It is part of this document to propose to your team that electing a platform-driven architecture will be a more beneficial approach to Vertic, resulting in better sustainability, flexibility, as well as maintainability. We believe that Salesforce is this central platform to take Vertic into the future and have detailed this further in the Salesforce as a Platform section of this document.

In addition to being able to minimise complex integrations by using the platform-driven approach, we also believe this will give your team the ability to start consuming software in preference of building software. Software consumption (rather than building) has become the most effective way to introduce functional components to your enterprise architecture and we are proposing this approach for Vertic.

This approach dictates two principles for success; the first one states that each piece of information only exists once across the architecture and the second one states that the most critical information resides within the platform rather than within a connected solution. This is one the primarily enablers of strong and reliable reporting as well as data analytics.