

Roundabout Canberra

provides safe and clean baby and children's items to families in need through a network of community and not-for-profit organisations.

Project length 9 weeks

Completion date Dec 2021

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Jessica's wealth of Salesforce knowledge was immense. She was able to integrate with other systems as needed in order to deliver maximum value and we found her prompt communication throughout the engagement fantastic. We would highly recommend her!

Jeanette Dyer

CEO

Roundabout Canberra



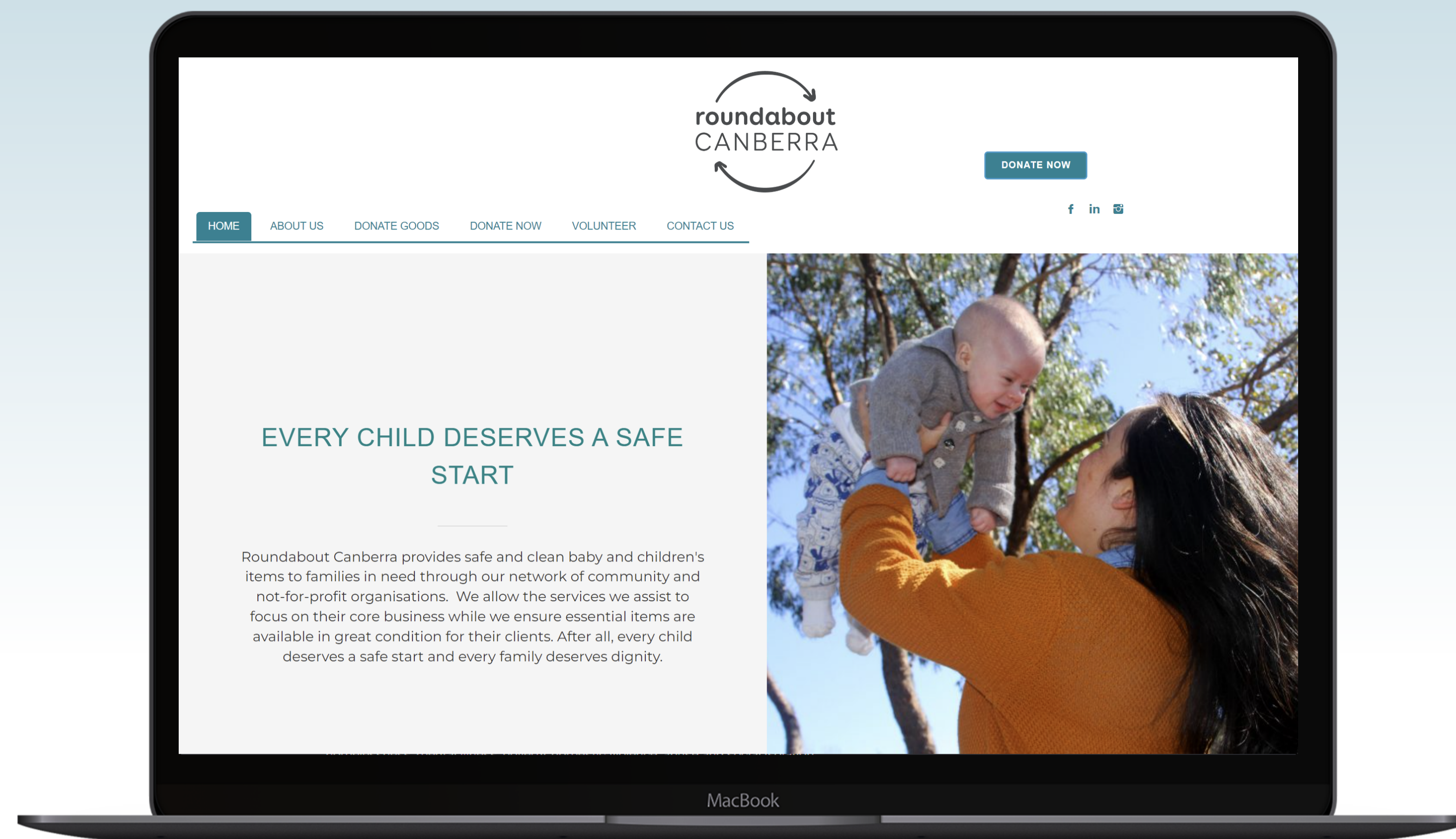
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**Blaze
your
Trail**



Challenge

An out-of-date system of Google Forms was used to register social workers and manually enter their data into a referral management system. The volunteer who had built this initial set up was unable to support any ongoing updates or issues.

There was no integration with the organisation's safety-checking app and no way to record bulk deliveries. Stock could not be accounted for or traced during each stage of repair and readiness or in relation to the family order it was attributed to.

It was difficult to register and correspond with volunteers, and there was no way of tracking skills, availability, or total volunteering hours and shifts.

Solution

Several legacy systems used for service user registrations and volunteer applications were replaced with Web-to-Lead and Web-to-Case forms.

When stock is safety-checked on the mobile app, inventory records are now created in Salesforce, relating to the relevant case records that show which families the stock has gone to. An automated process on case closure sends a final confirmation email to the service user that details the value and savings from landfill.

Volunteers 4 Salesforce makes it easy to track hours, allocate tasks, and set density limits in the warehouse for COVID-19 safety.

Benefits

Easy to track stock

Multiple stock item records can be created at once, making it easy to record stock that is purchased new or donated in bulk such as cots and prams. This saves the team many hours each week.

A self serve portal for volunteers

Personal sites allow self service for volunteers and frees up valuable time for the staff to do less paperwork and more training.

Beautiful reporting

Unique home pages display the most important information to each team. Staff were trained on how to prepare reports and dashboards, making month-end reporting a breeze.