SHINE Project

CUSTOMER COMPANY PROFILE

LOCATION:	*Dublin,Ireland*
EMPLOYEES:	*25-50 users*
INDUSTRY:	*Non Profit*
Solution(s):	*Salesforce Implementation*
GO LIVE DATE:	*15/12/2022*

CUSTOMER OVERVIEW

Shine is a national organization providing information and support for people affected by mental health difficulties. We support individuals and family members through individual and group work, Training and education led by professionals and peers (people with lived experience of mental health difficulties or people who have lived experience of supporting a family member or relative).We are the only national mental health organization specifically founded to help all family member
Website: https://shine.ie/

Challenge

SHINE team was looking solution for public to log enquiries on Brief Information and Support, Peer Support Groups, Recovery Education through their website. They need a database to store details logged. When public signup through their Newsletters, those should be stored as contacts in database. All these data should be categorized and sorted in database. Automated emails should be sent to Managers on leads creation/updation.

Solution

o Customers can log leads from their website on clicking *Brief Information and Support, Peer Support Groups, Recovery Education* through registration forms designed by Techstrom using Web To Leads.
o These leads are categorized and stored using Salesforce Record Types.
o Leads stored in Salesforce will turn into Organizations and contacts.
o A automation process was designed to identify leads singed up using Newsletter and convert them into contacts.
o Users are configured well using with all details given and security was enforced.

Results

People have various signup options according to the support needed from them. They can log their details using options Brief Information and Support, Peer Support Groups, Recovery Education available on their websites.
This helps users to store their data as leads in salesforce.
Those records are categorized on the name of the support.
When people signup using newsletters details are stored as contacts using automated flow. Reports and Dashboards are created to track the data recorded on daily basis.

Salesforce Best practices were not followed by the previous Salesforce partner's build . TechStorm Consulting analysed this and implemented this for Shine

Notes

- *Through interviews with Shine team , Techstorm recommended a customized approach that would involve web to lead form through various options available in website and categorize to store them in Salesforce .*
- **TechStorm believes CRM is shifting toward cloud computing and Salesforce.com is a leader in cloud computing, offering a complete set of CRM cloud applications, a cloud platform, and a cloud infrastructure – more cost effective for a higher return on investment**

Quantitative Results if Available

The aim is to 100% completely to save leads to website and store in the Salesforce Database. Share them to regional leads in sites according to the region.

Additional Details

Competitors of Salesforce engaged in sales cycle:	N/A
Previous technology replaced by Salesforce:	N/A
Salesforce products deployed:	Non profit Cloud, Sales Cloud
Customer Business Model (B2B, B2C, or Both)	
Salesforce Product features:	Non Profit Cloud
If using Service Cloud, list use case (e.g. customer support, call center, field service, telesales, etc.)	
Integrations:	Website
AppExchange Apps/Partners	

Screenshots of app or implementation (if applicable)

Sharing Guidelines

These questions are required for your story submission to be accepted. We will not contact the customer without reaching out to you first.

Sharing Use Case	
Can Salesforce AEs share this story and overview slide in sales settings?	Y
Can Salesforce AEs mention the customer name in sales settings?	Y
Is this customer willing to act as a reference customer for prospects?	Y
Would the customer be willing to speak at Dreamforce or other events?	Y

Submitter Information (Partner Information here)	
Name of reference approver:	Derek Pepper
Title of reference approver:	
Email of reference approver:	dpepper@shine.ie

[SHINE] – Customer

[TechStorm Consulting Ltd]- Partner

[Customer Name] and [Partner Name] are Trailblazers

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Derek Pepper, Operational Manager
Shine