



# SHINE Project

## 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/>

## CUSTOMER COMPANY PROFILE

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

| Challenge  | Solution  | Results   |
|--|---|---|
| <p>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.</p> | <ul style="list-style-type: none"> <li>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.</li> <li>These leads are categorized and stored using Salesforce Record Types.</li> <li>Leads stored in Salesforce will turn into Organizations and contacts.</li> <li>A automation process was designed to identify leads singed up using Newsletter and convert them into contacts.</li> <li>Users are configured well using with all details given and security was enforced.</li> </ul> | <p>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.</p> <p><b>Salesforce Best practices were not followed by the previous Salesforce partner's build . TechStorm Consulting analysed this and implemented this for Shine</b></p> |



# Additional Detailed Information and Quantitative Results

## Optional Commentary and Notes about Details of Deal or Implementation



### 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.*



# Solution Details



| 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)

Lead creation form with fields for First Name, Last Name, Email, Phone, Address 1-3, Country, and checkboxes for consent and call request.

Screenshot of Salesforce Leads page with a 'New Lead' modal open. The modal lists record types: Brief Information and Support, Peer Support Groups, Recovery Education, and Shine Newsletter.

Screenshot of Salesforce Leads page showing a list of leads with columns for Name, Title, Owner Alias, Lead Status, Created Date, and Unread By.

| Name                          | Title          | Owner Alias         | Lead Status          | Created Date     | Unread By |
|-------------------------------|----------------|---------------------|----------------------|------------------|-----------|
| All Open Leads                |                | kward               | Open - Not Contacted | 24/11/2022 18:10 |           |
| Brief Information and support |                | kward               | Open - Not Contacted | 14/12/2022 08:19 |           |
| International Leads           |                | kward               | Open - Not Contacted | 14/12/2022 08:21 |           |
| Peer Support Groups           |                | kward               | Open - Not Contacted | 14/12/2022 16:21 |           |
| Recently Viewed (Pinned list) |                | kward               | Open - Not Contacted | 28/11/2022 20:48 |           |
| Recovery Education            |                | kward               | Open - Not Contacted | 14/12/2022 15:26 |           |
| Shine newsletter              |                | kward               | Open - Not Contacted | 30/11/2022 13:55 |           |
| Today's Leads                 |                | kward               | Open - Not Contacted | 29/11/2022 21:45 |           |
| View - Custom 1               |                | kward               | Open - Not Contacted | 29/11/2022 21:46 |           |
| View - Custom 2               |                | kward               | Open - Not Contacted | 03/12/2022 17:48 |           |
| Elizabeth Long                | H.S.E.         | efalong@hotmail.com | Open - Not Contacted | 03/12/2022 17:49 |           |
| Emer Hall                     | [not provided] | emar_test@gmail.com | Open - Not Contacted | 07/12/2022 21:13 |           |
| Emer Hall                     | [not provided] | emar_test@gmail.com | Open - Not Contacted | 01/11/2022 22:37 |           |

Contact creation form with fields for First Name, Last Name, Organisation, County, and checkboxes for marketing permissions and email sign-up.

Screenshot of Salesforce Contacts page with a 'New Contact' modal open. The modal lists record types: Member, Client, Contractor / Volunteer, Counselling Client, External Partner, Headline Contact, NDTRS Client, Recovery Client, Shine Newsletter, and Staff Member.

Screenshot of Salesforce Organisations page showing a list of organizations with columns for Organization Name, Type, Organizational, Parent Organisation, and Created Date.

| Organization Name                         | Type                                  | Organizational | Parent Organisation | Created Date     |
|---|---------------------------------------|----------------|---------------------|------------------|
| Shine                                     | Mental Health Community and Voluntary | National       | RDO                 | 08/12/2011 10:51 |
| Mental Health Reform                      | Mental Health Community and Voluntary |                | DKava               | 16/02/2012 10:15 |
| Individual                                | Individual                            |                | Shine               | 19/09/2018 11:58 |
| Dublin Resource Center                    | Other                                 |                |                     | 20/11/2019 10:40 |
| HSE National Mental Health                | HSE                                   | National       |                     | 27/10/2021 16:37 |
| Brian Kelly                               | Goods and Services                    |                | bbyrn               | 04/02/2022 14:32 |
| Charity Careers Ireland Ltd               | Goods and Services                    |                | bbyrn               | 04/02/2022 14:36 |
| Cherwell Holdings Ltd                     | Goods and Services                    | East           | bbyrn               | 04/02/2022 14:39 |
| Electric Ireland                          | Goods and Services                    | National       |                     | 04/02/2022 14:44 |
| Frontline Films Limited                   | Goods and Services                    |                | bbyrn               | 04/02/2022 14:49 |
| South Dublin Carers Group                 | Mental Health Community and Voluntary | East           | Shine               | 11/02/2022 10:19 |
| Shine Recovery                            | Mental Health Community and Voluntary | National       | Trisha              | 23/02/2022 17:34 |
| NLN - National Learning Network Tullamore | Education and Training                | Midlands       | JDowl               | 01/03/2022 10:05 |
| Focus Ireland                             | Other Community and Voluntary         | National       | Martin              | 03/03/2022 10:08 |
| HSE CHO 9 DNCC Disability                 | HSE                                   | National       | Trisha              | 03/03/2022 16:39 |



# 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 |

# [Customer Name] and [Partner Name] are Trailblazers

[SHINE] – Customer  
[TechStorm Consulting Ltd]- Partner



## Challenge

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## Solution

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.

These leads are categorized and stored using Salesforce Record Types. Leads stored in Salesforce will turn into Organizations and contacts.

A automation process was designed to identify leads signed up using Newsletter and convert them into contacts. Users are configured well using with all details given and security was enforced.

**Derek Pepper**, Operational Manager  
*Shine*

