IHF Project

CUSTOMER COMPANY PROFILE

LOCATION:	*Dublin,Ireland*
EMPLOYEES:	*25-50 users*
INDUSTRY:	*Non Profit, Experience cloud*
Solution(s):	*Salesforce Implementation,Sales Cloud*
GO LIVE DATE:	

CUSTOMER OVERVIEW

Caru is an initiative of Irish Hospice Foundation (IHF) in partnership with All Ireland Institute of Hospice & Palliative Care (AIIHPC) and the Health Services Executive (HSE). Caru is a continuous learning programe that will support and empower nursing home owners and staff in the delivery of palliative, end-of-life, and bereavement care to residents. This in turn will support enhanced quality of life and a good death, while easing the bereavement process for families and staff.
Website: https://hospicefoundation.ie/

Challenge	Solution	Results
IHF team was looking for a solution to log enquiries from customers through their website, that will be captured in salesforce then turn into Organizations and contacts upon conversion. This Organizations and contacts represents nursing homes under Caru. *Regional leads has difficulty to login and track information of organizations belonged that region. Security for various level of users was in effect.*	• Capture Leads from IHF Website to Salesforce o Customers can log leads from their website through registration through form designed by Techstrom using Web To Leads o Leads stored in Salesforce will turn into Organizations and contacts represents nursing homes and others. o Old data in the system was soft deleted. o Latest Organizations details were provided by IHF,TechStrom helped them to load into Salesforce Database. o A automation process was designed to identify CHO based on the county provided this helped for sorting of data using list views o Users are configured well using with all details given and security was enforced using Internal and External Profiles. o Record Level security is arranged to share records to Regional leads based upon their CHO. o An External System was designed for Regional Leads to login and view data related to their respective region.	Customers can now log leads from their website through registration through form designed by Techstrom. Leads stored in Salesforce will turn into Organizations and contacts represents nursing homes and others. Latest Organizations details were provided by IHF ,TechStrom helped them to load into Salesforce Database. Old data was archived. System was designed to identify CHO based on the county provided this helped for sorting of data using list views. An External System was designed for Regional Leads to login and view data related to their respective region. Reports and Dashboards are created to track the data recorded in the system by managers.

Notes

- *Through interviews with IHF team , Techstorm recommended a customized approach that would involve enabling Experience Cloud for Regional Leads to work on the Organizations of their region.*

- **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 from website and store them in the Salesforce Database. Share them with 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:	NPS Cloud, Activites, Sites,Web to Lead,Reports and Dashboards.
Customer Business Model (B2B, B2C, or Both)	Both
Salesforce Product features:	NPS Cloud,Experience Cloud
If using Service Cloud, list use case (e.g. customer support, call center, field service, telesales, etc.)	Experience Cloud
Integrations:	Website
AppExchange Apps/Partners	N/A

Screenshots of app or implementation (if applicable)
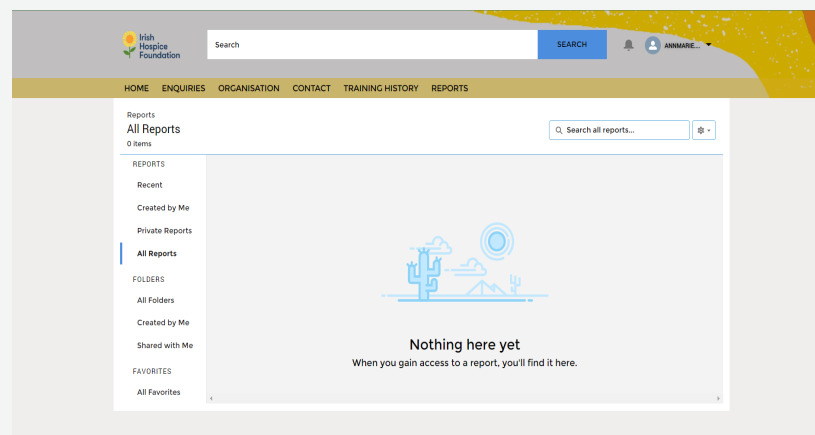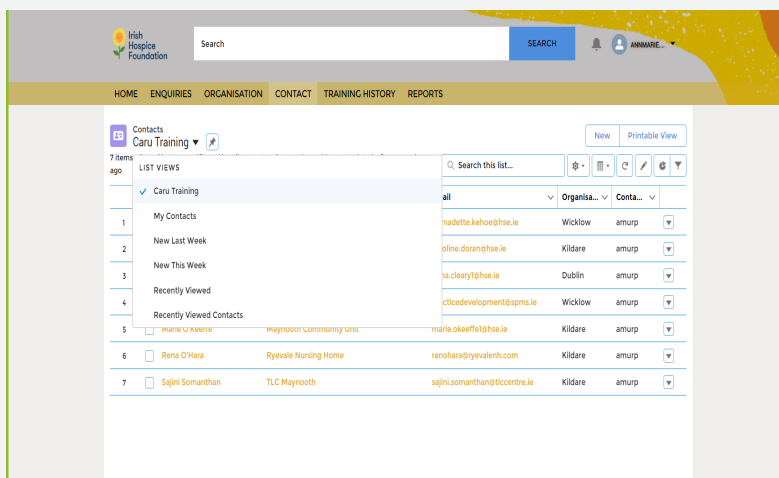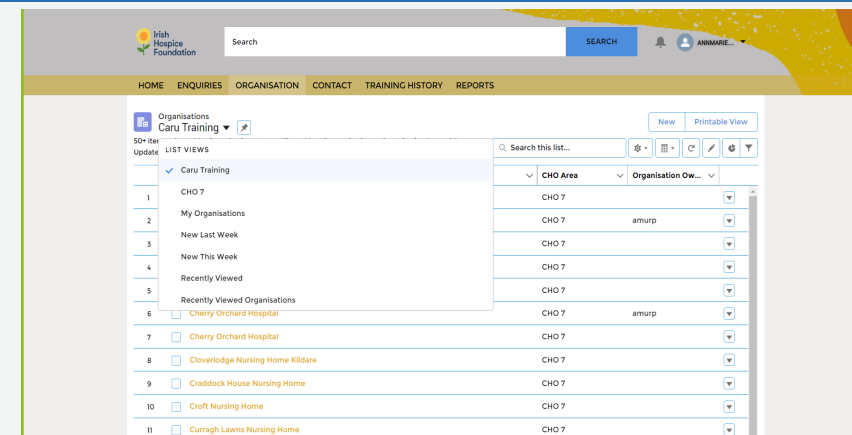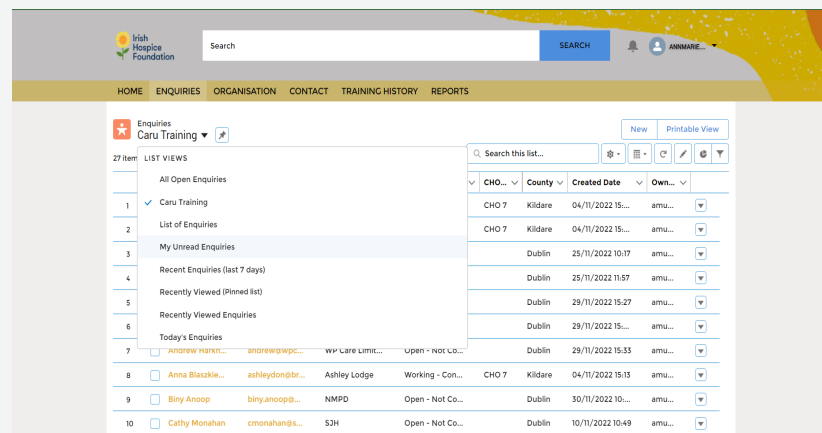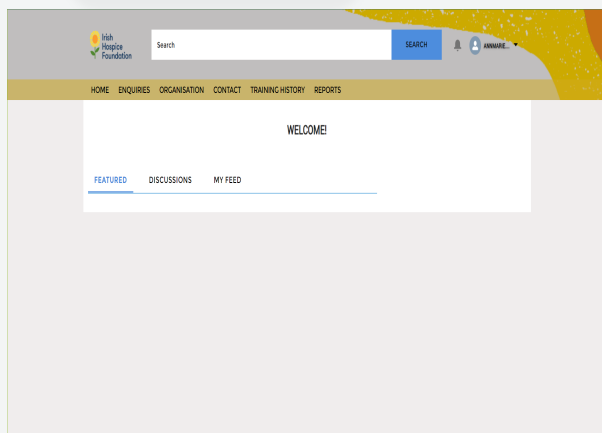
Sharing Guidelines

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:	Lynn Murtagh
Title of reference approver:	**Director**
Email of reference approver:	lynn.murtagh@hospicefoundation.ie

[Irish Hospice Foundation] – Customer
[TechStorm Consulting Ltd]- Partner

Challenge

IHF team was looking solution to log enquiries from customers through their website, that will be captured in salesforce then turn into Organizations and contacts upon conversion.
This Organizations and contacts represents nursing homes under Caru.
Regional leads has difficulty to login and track information of organizations belonged that region. Security for various level of users was in effect.

Solution

Customers can log leads from their website through registration through form designed by Techstrom. Leads stored in Salesforce will turn into Organizations and contacts represents nursing homes and others.
An External System was designed for Regional Leads to login and view data related to their respective region.
Reports and Dashboards are created to track the data recorded in the system by managers.

Irish Hospice Foundation

TechStorm
EXPERTS IN DIGITAL SERVICES

salesforce.org