

Digital Transformation helps charitable trust streamline their internal work processes.

Fronde partners with charity organisation Chinese New Settlers Services Trust to take their workforce to the Cloud. It was becoming increasingly obvious to the organisation that they needed to streamline their systems, and have better technology tools to keep up with their growing business needs and efficiency.

Background

With the support from the local community, Chinese New Settlers Services Trust (CNSST) started as a charitable trust in 1998, providing social work, settlement and Chinese cultural programmes to the Chinese community. Over the years, the trust has expanded. It now provides more services to the wider community and has seven cultural learning centres located across the Auckland region. Its educational programmes include both community education and tertiary level education, which is approved by NZQA.

CNSST also provides social services, including social work & counselling, employment and enterprise and settlement support.



The Challenge

CNSST has been focusing its attention on the charity growth and their key stakeholders: funders, the partner network, clients and volunteers. Until recently CNSST has been able to support day to day operations through basic office and accounting tools. However, CNSST realised that their current ICT environment become increasingly unfit for purpose and does not provide a platform for future growth.

Having developed a cloud-based ICT strategy and roadmap to meet the changing needs of the charity, CNSST decided that they needed a CRM solution to achieve the requirements below:

- + manage their funders, partner network and clients efficiently
- + reduce maintenance effort and cost so that they can focus on their business and customers
- + streamline their processes and improve agility
- + perform data analysis at ease
- + scalable and able to support future growth



As a first step, the charity required a solution for the social work team and the employment service team for better client and case management.

The Solution

CNSST identified Salesforce as its preferred technology to support its CRM requirements; it is the leading CRM with an excellent package for non-for profits, and CNSST also wanted to use the opportunity to innovate with cloud technologies, which would enable the them to reduce time and cost to bring services to the community.

CNSST engaged Fronde to develop the required Salesforce solution. The solution was delivered in just five weeks, using an iterative Agile approach of one week design-build-test cycles, using only Service Cloud out-of-the-box functionality. It supports the needs of both Employment Enterprise Team and Social Work Team by sharing only the need to know information among teams. The main reason is to protect client privacy and be compliant with the confidentiality agreement CNSST sign with clients. The solution is also intuitive and easy to use, it provides a central and historical view of client engagement with CNSST, so it is easier for the team members to manage cases and provide quality service.

Specific functionality delivered included:

- + management of organisations and key contacts
- + management of social service projects
- + management of client information based on selected projects
- + tracking of project deliverables
- + case management for different projects including online referrals
- + reports and dashboards to track overall performance for each project and customer segmentation analysis
- + survey management using third party application - Timba Survey
- + duplication management using third party application - DupeCatcher
- + application integration - Salesforce for Outlook application
- + application integration - MailChimp

The Outcome

CNSST has been delighted by the solution and project. They look forward to a single customer view, simplified processes, real-time data analysis, and getting all users trained to adopt the system.

"I can already see that Salesforce is going to make this process a lot more efficient and consistent, I can focus more on our clients rather than the internal paperwork and manual analysis. This is going to help us continually improve our services to our clients." Joanna Jensen, and Scott Huang, CNSST Social Work and Employment Team Leads.

CNSST are looking to move as many of their processes as possible onto the Salesforce platform in future phases so they can have consistent user and customer experience whilst leveraging all the benefits of the platform.

After having used Salesforce for a few months now, Bill Guan, Social Enterprise Manager at CNSST, says the ease of data collection and centralised data access is among the major benefits Salesforce has given them. Data collection is now streamlined (they didn't previously have an appropriate system to support the operation), and now data only needs to be entered once and they don't have to create multiple reports.

"Using Salesforce to streamline our client management (such as transfer, referring and sharing), it's now a lot easier to manage and shows a trackable history. The well designed automated work process has helped staff to follow up with service milestones with the corresponding client." Says Bill Guan.

Bill estimates that using Salesforce to streamline data collection and client management saves about five hours per week, per person in the organisation.

Fronde has helped with Chinese New Settler's technology transformation by translating their desired business outcome, into a well-structured technical system to support their operation.

"Fronde has been very helpful, they have been very considerate, efficient and I love their 'agile approach' to the project. They have made sure to show us the progress tangibly, and are agile in amending certain things to suit our needs. We would love to find more potentials of the system and integrate all our operations into the system in the future." Says Bill.

Overall, it was a successful project. Chinese New Settlers were happy with the outcome and the process which Fronde took to achieve their business goals. The partnership continues and CNSST are looking to integrate more departments to Salesforce with added on features to best suit their business.

About Fronde

Fronde is a technology industry leader with 23 years of experience, 200+ people, and offices across Australia and New Zealand. Responsible for liberating hundreds of organisations from their traditional IT constraints, Fronde is leading in an era of unprecedented technology change.

Proud to be a Salesforce Gold Partner, 5-Star NetSuite Solution Provider (and #1 in APAC), Amazon Advanced Consulting & Channel Reseller Partner, and Google for Work Premier Partner, Fronde serves businesses with an unrivalled cloud portfolio.

Fronde aims to liberate organisations to pursue new levels of innovation and efficiency, delivering business outcomes through their technology consulting, software development, systems integration, managed services and cloud solutions.

For an inspiring approach to business transformation through market leading solutions, contact Fronde.



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