

Loved & Shared is a charity that gifts childhood and nursery goods to vulnerable and at-risk families in South West Victoria, to help them raise thriving children.

Project length 11 weeks

Completion date Dec 2021

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Blaze Your Trail have guided us through the transition to Salesforce, customising it to our needs and ensuring we are maximising its capabilities. We problem solve together which allows us all to learn. No problem is left unsolved. Blaze Your Trail always ensure a solution is found. They understand our needs as a small not for profit. We could not have progressed as far as we have without Blaze Your Trail.

Tim McPherson

Board Member



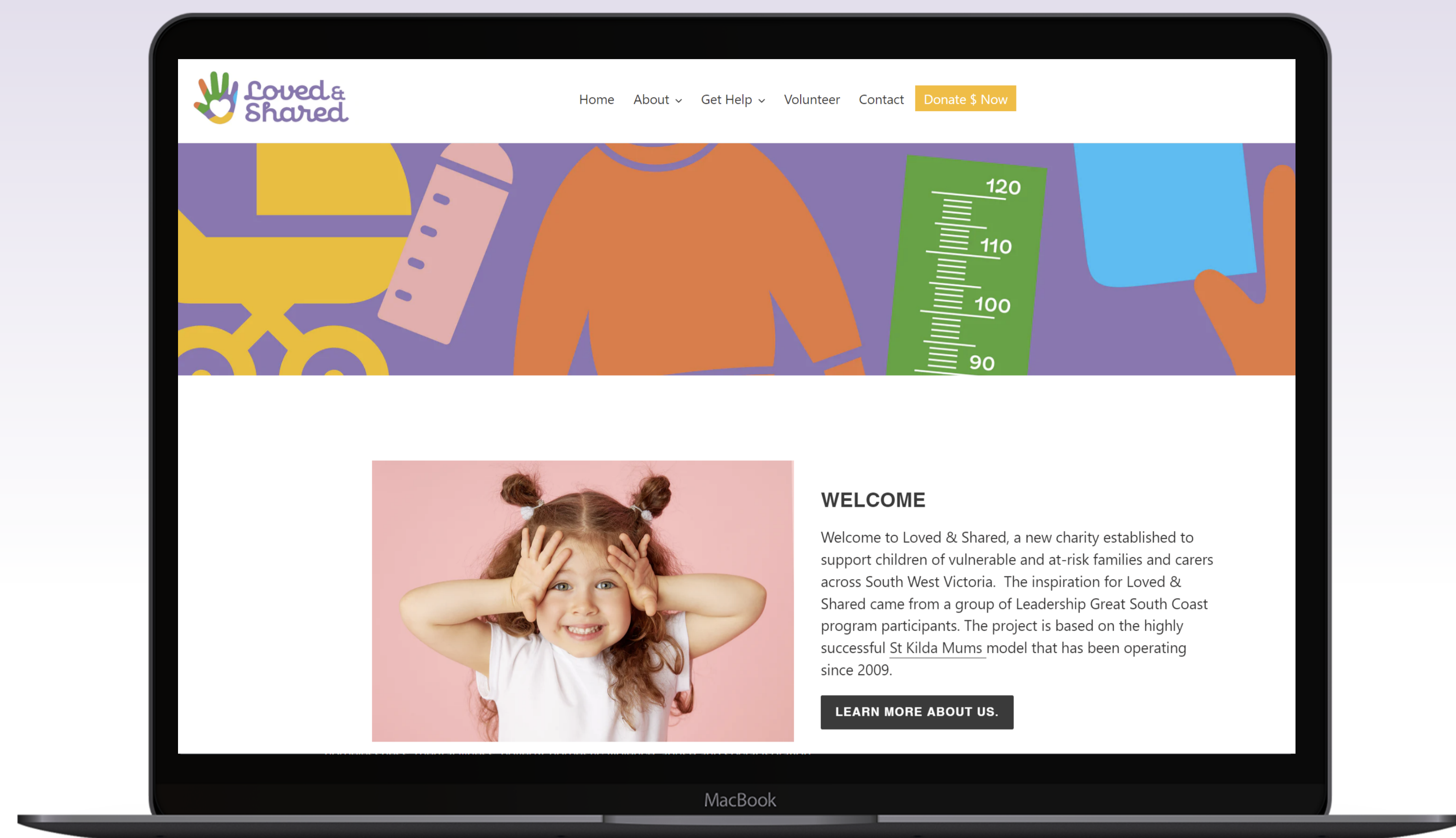
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**Blaze
your
Trail**



Challenge

Loved & Shared priorities included fundraising, volunteer and service user management.

As a recently endorsed charity, they wanted a way for people to donate money online to support the organisation's important work.

Loved & Shared needed a website, CRM, mass email tool, email addresses for their committee, and password manager.

Solution

Blaze Your Trail implemented the Salesforce Nonprofit Success Pack, built a simple website with Shopify and integrated both with Mailchimp for easy segmentation of the newsletter list for different audiences.

Web-to-lead forms were added to the website to accommodate the volunteer application form, service user registration form and general contact us form. As a result, all these enquiries can be acknowledged with auto-response emails.

The volunteer induction process is made with lead statuses, and matching rules ensure that duplicates records are avoided.

Blaze Your Trail supported Loved & Shared to apply for free Google Licences through Connecting Up so that they could have email addresses on the organisation's domain.

Benefits

A solid foundation for growth

Salesforce is highly customisable, and has been set up in a way that allows additional functionality to be added in the future, including inventory, client and volunteer management.

One place for all contact information

The directors of Loved & Shared no longer work in silos, and all correspondence is automatically tracked in Salesforce with Einstein Activity Capture.

Webforms ensure consistency

All enquiries are created via forms meaning that the data is clean and organised, and categorised for easy prioritisation, sharing the workload efficiently.