

Freedom Solutions

changes the lives of adults and children living with a disability by providing personalised technology, equipment and services. Freedom Solutions understands children can grow quickly, so many of their designs are adjustable so they will grow along with the children.

Project length 9 months

Completed August 2023



Blaze Your Trail's professionalism and commitment to fostering a strong and enduring business relationship is rare.

They not only provide exceptional service but also share our values of integrity and collaboration.

Scott Miller

CEO

Freedom Solutions



Paula Nuñez

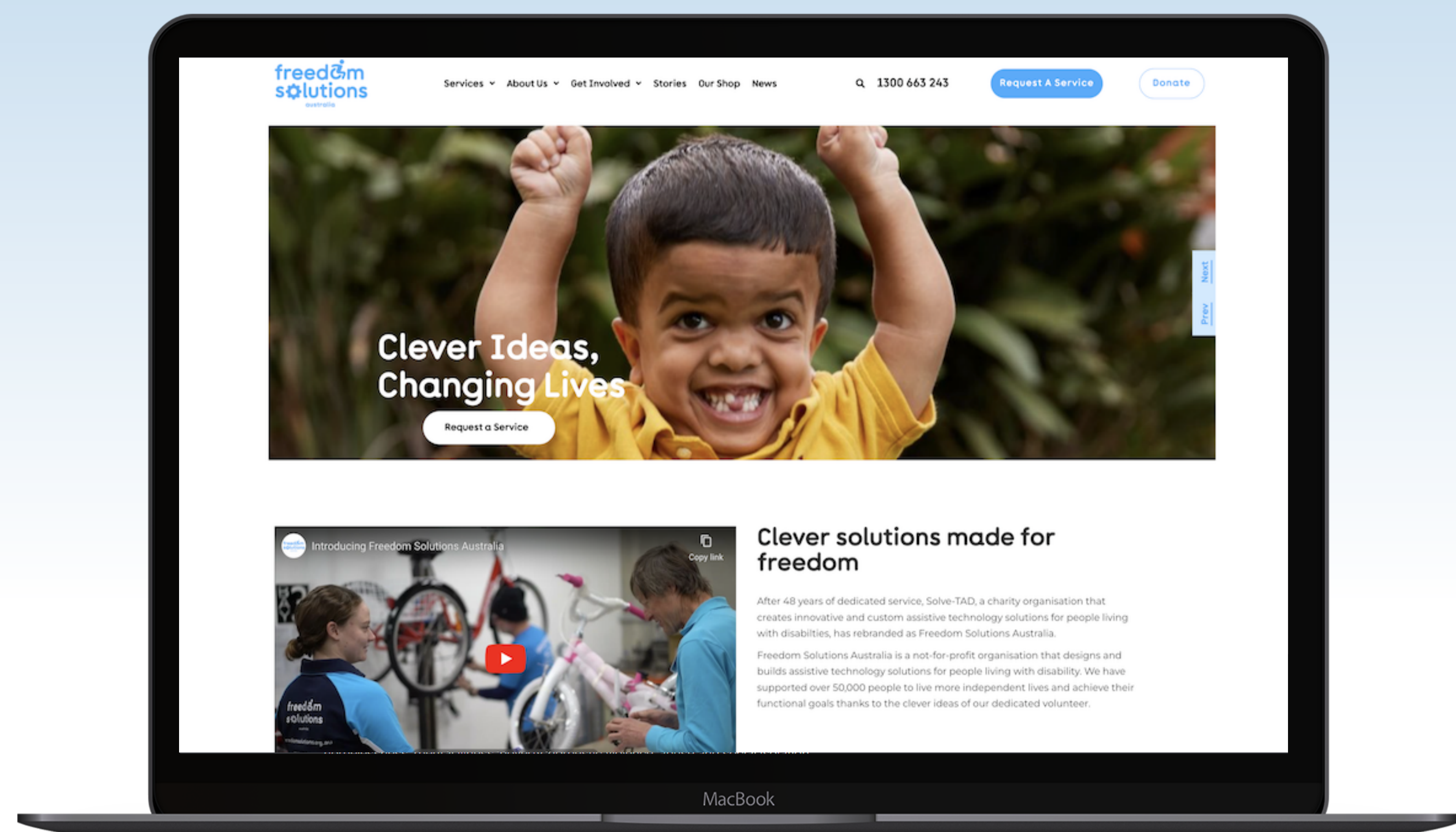
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**Blaze
your
Trail**



Challenge

The three biggest challenges were unlinked systems, too many manual tasks and poor data quality. Because Salesforce had not been correctly set up, it was very hard for Freedom Solutions to implement what should have been easy integrations due to data and process issues.

For example, the process for quoting on custom-built bicycles posed several challenges: room for error with manual data entry at different points of the process, a limit of one quote for each opportunity, contacts/organisations occurring in Salesforce multiple times, referrers not linked to organisation affiliations or linked to multiple organisations, and organisations not set up correctly. Each custom-built bike prescription was created as a disconnected custom spreadsheet.

Solution

First, a comprehensive health check was run. The Referral Process was rebuilt to record all the different contacts related to the referral with clear roles, such as the nominated contact, emergency contact, community therapist and the submitter of the form.

A brand new process was created for managing how equipment is custom-designed and built, with extensive logic to accommodate different options, while at the same time providing flexibility for future product/components changes.

A process was created to easily send the prescription form to the therapist, already pre-filled with the relevant referral data. The therapist can now submit one or more prescriptions for the same referral, with the option to save their progress and continue it later on the web form.

Benefits

Improved workflow efficiency

The team can easily create a quote for each prescription, as well as instructions for the team building the equipment including measurements and special instructions. This ensures accuracy and saves the team time.

Improved data quality

Client details, their personal and sensitive information are stored securely, which is critical as clients are often minors. The right connections are made between clients and their family members, or between workplaces and a person's role.

Improved client response

All enquiries are tracked, all communications between the team and external stakeholders are visible organisation-wide, and the end-to-end process is reliable and predictable.