

Nurturing Families

is a charity that supplies material aid for families struggling to provide for their children. They assist families in crisis with items that include nappies, wipes, baby and children's clothing, baby food, cots, car seats, prams, school bags and more.

Project length 7 weeks

Completion date March 2023



This project has enabled us to spend less time online and more time on the ground, being where the need is, while we have a system that pretty much does everything automatically for us. It's a CRM system that we know will be able to grow as we do, which is really exciting.

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Challenge

Before this project the process of ordering baby items was disjointed and manual, with orders received via Jotform and correspondence in multiple email inboxes.

The administrative load was significant and prone to error.

Fundraising efforts were disorganised prior to one system being established, which meant the team really did not know who their supporters were.

Solution

A fully integrated system was built for processing orders, from receiving orders online through a Web-to-Case form, to printing of easy-to-read picklists via a List View Button on the Case object.

Each item requested and distributed has a built-in dollar and weight value assigned, which is automatically calculated at Case Closure.

A Web-to-Lead form with the ability to collect newsletter opt-in information was built to manage and prioritise all general enquiries.

Raisely was integrated to ensure that all current and future online donations flow directly into the CRM, creating new or updating existing contacts.

Mailchimp was integrated to push newsletter opt-in and other segmentation data through for more targeted mass emailing.

Benefits

Time Savings

There is now a much easier and clearer user experience for referring caseworkers. Printing and packing orders is simple thanks to the Print Picklists functionality.

Shared View of Each Stakeholder

Contacts are easily created and updated, from the order or enquiry forms, or the team's inboxes in Gmail using Einstein Activity Capture.

Simplified Reporting

Reporting is now a breeze, with the ability to measure impact calculated at Case Close with Reports and Dashboards displaying live data.

Beautiful Fundraising

Nurturing Families can accept donations of money online, on simple, mobile-optimised forms. Donors are thanked and receipted immediately. Levels group donors based on their giving history so the team can personalise their communications even more.