Ocean Mind provides therapeutic surf courses for young people experiencing difficulties in their lives. The organisation uses a mix of surf therapy and mentoring to create a therapeutic environment for young people to challenge themselves, learn new skills and develop and strengthen relationships with family friends and the broader community.

Project length 15 months
Completed March 2024

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The move to Salesforce has not only alleviated the burden of manual tasks but has also empowered us to capture more comprehensive data for evaluating the impact of our services.

This transition has truly elevated and enhanced the efficiency of our organisation.

Rachael Parker
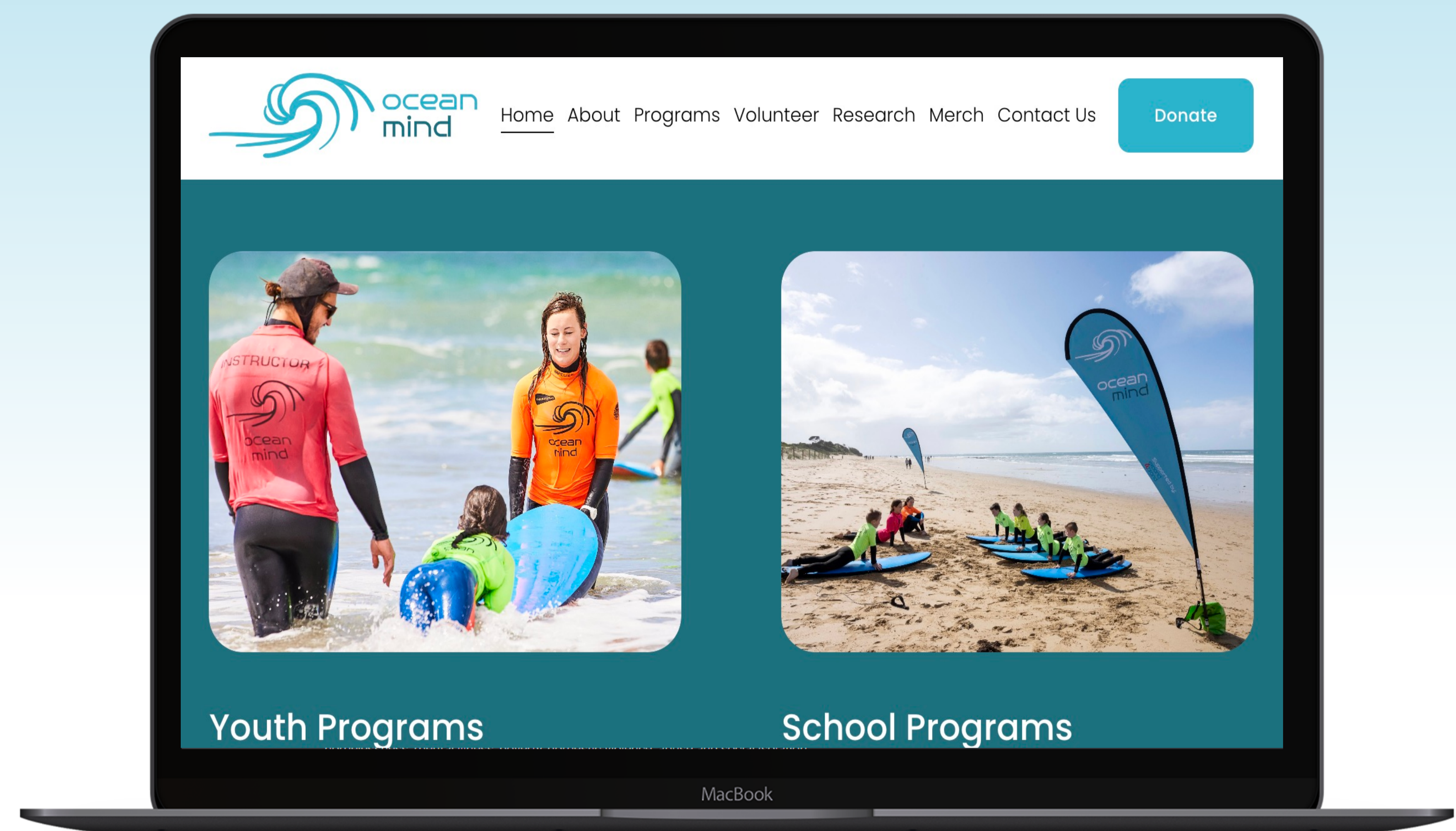CEO
Ocean Mind

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Challenge

Ocean Mind faced significant challenges in accessing information and accurate reporting due to the disjointed nature of multiple isolated platforms.

Their setup involved 13 separate systems for records, resulting in extensive manual data entry and time-consuming efforts to ensure accurate input by staff. They needed more confidence in the data collected.

To start each intake, the team called each client to take an assessment, manually inputting their data into a form and then uploading it into the old CRM system.

They wanted to change this process to automate participant onboarding to reduce manual work and enhance data reliability and efficiency.

Solution

The implemented solution harnessed the power of Salesforce, with the Program Management Module (PMM) serving as the central repository for all data. By leveraging online forms created using FlowTool Kit and integrating Acuity Scheduling through Zapier, participant information and scheduling seamlessly integrate into Salesforce. Custom automation further optimises the process, facilitating efficient management of onboarding and participant lifecycle processes.

Facilitators access a Customer Community site that lets them manage participant details, attendance, service deliveries and notes from their mobile devices. This is especially important as the programs take place on the beach, so a mobile-first approach is essential.

Comprehensive Role and Record security measures uphold data confidentiality and ensure proper access controls.

Benefits

Clean data

By streamlining participant onboarding, the team now uses clean and uniform data across the organisation, ensuring accuracy and improving overall efficiency and productivity.

Efficient time management

Custom solutions for automating participant intake, progression through programs and scheduling makes efficient use of the nonprofit's resources.

This includes the streamlined coordination of participants, mentors and facilitators, and significantly reduces manual tasks, freeing up time and resources that can be allocated to more strategic initiatives.

Security

The implementation of security measures to ensure data confidentiality and grant appropriate access levels within Salesforce have safeguarded sensitive information from unauthorised access or breaches.