

**Outward Bound** is a global movement founded in 1941. It exists to inspire people across the globe to discover their potential and in doing so, contribute to a better, bolder, more compassionate and more resilient society.

**Project length** 6 weeks

**Completion date** April 2023

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Jessie and Becky were amazing from start to finish. They took the time to understand our needs and how Salesforce would best fit those needs. They were detailed oriented, held us accountable to deadlines and managed the project efficiently and effectively across our team. We look forward to working with them again as we grow and integrate more of the business with Salesforce.

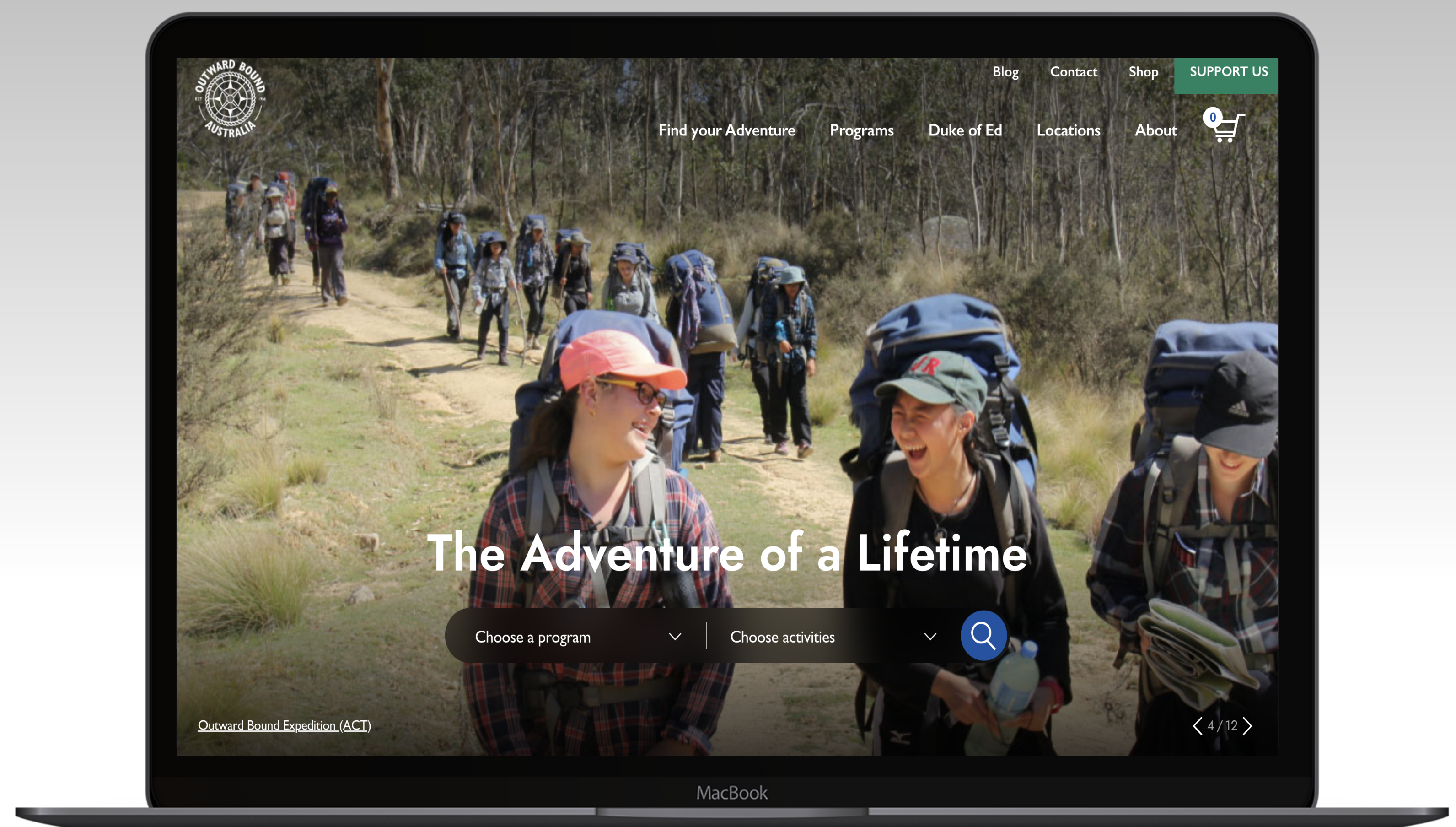
**Ian Wells**

Head of Sales and Partnerships  
Outward Bound



**Rebecca Parsons**

Salesforce Consultant  
Blaze Your Trail  
+61 419 620 071  
rebecca@blazeyourtrail.org



## Challenge

Previously Outward Bound Australia contacts were managed in multiple spreadsheets or were hidden away in email inboxes. There was a duplication of data across systems.

There was a significant risk in relationships being held personally and communications were only visible in individual email accounts.

The lack of CRM led to inconsistent communication with external customers, alumni and donors.

## Solution

Salesforce NPSP was implemented and business contacts migrated from email, spreadsheets and Xero to provide organisation-wide visibility and to better manage relationships with key stakeholders and partners.

An new Outlook integration allows the team to create Salesforce records from within email inboxes, and easily log emails as desired. Mailchimp was integrated for email campaigns.

ICSEA data was migrated into Salesforce to help Outward Bound Australia understand the socio-education backgrounds of students and support their goal of helping disadvantaged young Australians.

## Benefits

### Happy team

A functioning, reliable system that is easily used by all team members for managing relationships with their key stakeholders and partners. 100% user adoption.

### One source of truth

Blaze Your Trail migrated all existing accounts and contacts, so they are now easily accessed in a single location. There is no longer a reliance on spreadsheets and email, and the system has the ability to support the growth of the organisation.

### Better processes

A Web-to-Lead form ensures that all enquiries are captured and acknowledged consistently. Leads can be managed effectively within Salesforce, all communications can be tracked and opportunities easily created. More time and energy can be invested into nurturing relationships with partners and clients.