

## Sunshine Bendigo

provides material support and practical resources to families in need. The organisation cares for people experiencing challenges by easing the burden of costly equipment and clothing for young children, as well as providing connection to other services in the community.

**Project length** 6 weeks

**Completion date** August 2022



Our Salesforce experience was a huge learning curve for our organisation. We were lead through this process very well with a good understanding of what we wanted to achieve and the needs of our organisation.

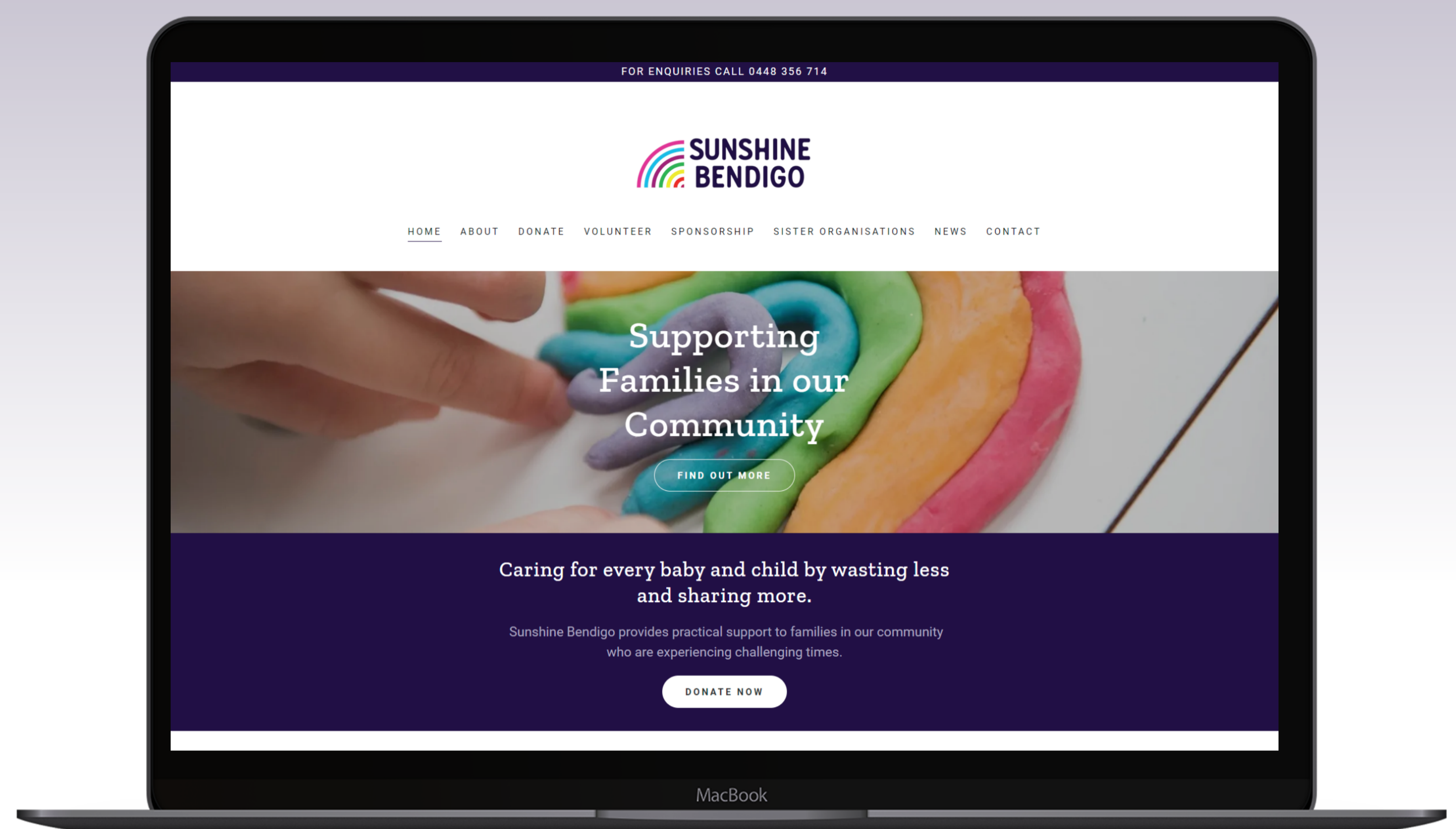
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## Challenge

Sunshine Bendigo was manually collecting requests for goods (baby and children's equipment and clothing) via phone and email, with all processed orders entered in a spreadsheet at month-end. Contacts were managed using spreadsheets. Producing reports on outputs so the team could measure impact was also a manual process, using spreadsheets for calculations each year.

## Solution

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

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

A general enquiry Web-to-Lead form has been created, along with the ability to collect newsletter opt-ins.

A Mailchimp integration has been established with Salesforce, pushing through data and newsletter opt-ins for mass emailing.

## Benefits

### Order efficiency for front and back-end users

Orders can be received and printed within minutes, providing a much easier and clearer user experience for the caseworkers ordering on behalf of families. Printing and packing the orders is simple for the Sunshine Bendigo team thanks to the Print Picklists functionality, which displays only the information relevant to the order and nothing more.

### Seamless contact creation that improves communication

Contact creation in Salesforce is much simpler, retaining information for future use straight from enquiry and volunteer application webforms, or from the team's Gmail inboxes.

### Tracking and reporting impact with ease

Reporting is now a breeze, with the ability to measure outputs and impact calculated at Case Close, and Reports and Dashboards displaying live data. Targeted communications are now possible thanks to the Mailchimp integration.