

# Swimming institution for disabled children enhances Salesforce to address Registration and Teacher, Volunteer Application Management

## Industry

Non-Profit

## Products & Services

Salesforce Sales Cloud

## Implementation Partner



[www.crmmit.com](http://www.crmmit.com)



A leading swimming institution based out in New SW with over 20 clubs working on providing swimming lessons for children with disability. Clubs operate during the four school terms and, with the generous support from volunteers and fundraisers, all swimming lessons are both individualized and heavily subsidized.

## Requirements

- Need for Parents to have access to a new Service Agreement form on the website to provide their wards' NDIS (National disability insurance scheme) registration details which makes them eligible for waivers.
- Need for Parents to have access to a new NDIS registration Status update form, in case the approval is still pending, which makes them eligible for subsidies.
- Build a background process in Salesforce to address sending timely fee reminders by email, to parents.
- Reports to help Staff members export a list of waived/ subsidized members, for them to then manually book Service appointment through the NDIS portal.
- Facilitate bulk imports for Staff members to update member NDIS Service appointment Ids back into SF.
- New website pages needed for interested Swim Teachers and Pool Volunteers, to apply. Applications to be processed using Leads in SF.

## Solution:

- Implemented the new forms needed using Sales force Lightning. These were then embedded into the Word Press website to facilitate the required SF integration needed.
- Processes and work flows configured within Sales force to automate sending periodic timely fee reminders and also to automate certain calculations which lead to productivity gains.
- Reports and Dashboards were implemented addressing NDIS reconciliation needs and also to address KPI visibility as needed.

- Lead Management processes implemented in SF to handle Swim teacher and Pool Volunteer applications.

#### **Benefits:**

- Tasks performed manually got automated and it led to an increase in the overall productivity of the internal team and satisfaction of their end customers.
- All the data now resides in Sales force which increased data consistency and improved decision making serving as the single source of truth.
- Reports and Dashboards were implemented to provide better insights about the business.
- No need to send manual emails update members on their statuses and other notifications.