

CLIENT RELATIONSHIP MANAGEMENT AND CASE MANAGEMENT

Independent State-level Statutory Body for Public Accountability

This state-level statutory body exists as an avenue for individuals or their representatives to file official complaints surrounding the Financial Accountability Act 2009 (Qld), Statutory Bodies Financial Arrangements Act 1982, Right to Information Act 2009 and Information Privacy Act 2009. This independent organisation has responsibility for investigating and reviewing decisions after complainants have attempted to resolve the complaint with the relevant agency.

Struggling to work with rigid systems and old frameworks

- The complaint management process was complex, drawing from multiple disparate legacy systems, leaving staff to deal with manual and labour intensive processes alongside frequent rework and double handling.
- Due to the nature of their work, this client needed a very secure solution that was both flexible and scalable as their caseload continues to grow over time.
- Visibility and traceability were key items for improvement. Correspondence and collaboration with relevant agencies was required in order to resolve complaints. More capability was required to accommodate Machinery of Government (MoG) outcomes such as agency restructures, renaming or shifts in responsibility.

Background

- Thousands trained annually in right to information and information privacy practices
- Manages approximately 4,000 requests annually

Challenges

- Duplicate work
- Delays in case handling
- No space for expansion or improvement
- Greater need for transparency

Outcomes

- Streamlined workflows
- Improved data availability
- Ease of reporting and compliance

Building a centralised, secure and scalable system

- Implementation was delivered collaboratively in sprints with high levels of communication, review and feedback.
- Facility for MoG changes allows for agency renaming, restructuring or splitting with full traceability over any legacy classification of cases. A simple MoG example from Queensland (October 2024) was the renaming of Department of Agriculture and Fisheries to Department of Primary Industries¹.
- Case management focused on the complainant was normalised and staff gained access to cross-channel historical interactions as well as efficient automated workflows.
- Salesforce functionality was used to build Forms specifically for exposure on the website. These were essentially constructed as predefined case templates for complainants to register a case. Automatically captured in the system, this feature allowed staff to process cases in a more timely manner with the added benefit of decreasing duplicate and manual data capture.
- To address transparency and traceability, a secure portal was built for relevant agencies. Once a complaint is made via an online form the agency involved is notified. Staff create an Agency administrator user profile. With their profile, Agency administrators can now view case progress, add further users, upload/share documents relating to each claim and be aware of open claims relating to their agency.
- The client was supported to introduce effective change management strategies for smooth adoption and long-term success. Downtime was avoided through the jettison of legacy data.

No longer limited and able to grow

- The client's operational efficiency has been significantly streamlined. Automated manual tasks and standardised workflows within an intuitive and user-friendly system allow staff to focus on complex cases and outcomes without being held back by the technology.
- Advanced reporting and analytics have enabled this organisation to draw on better data for decision-making, leading to improved efficiency, increased transparency, and better compliance with regulatory requirements.
- The agency portal greatly improves cross-department collaboration, case progression and visibility.

Customer Solution

SALESFORCE PUBLIC SECTOR SOLUTIONS

- Email to case / Approvals

OMNISTUDIO DOCUMENT GENERATION

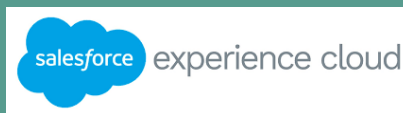
- Standardised templates / For complainant or agency

EXPERIENCE CLOUD

- Agency portal (for case management, document sharing, users/permissions)

FILE 365 (3rd party tool)

- Sharepoint integration (for documentation, security capability)



Looking Ahead

This client has been working with SalesFix for almost 2 years and continues to collaborate on evolving and refining the solution to improve their service.

Other Use Cases

A solution such as this is recommended for publicly funded or for-purpose organisations which have ongoing interactions with a wide variety of agencies or government and require transparency and traceability for MoG changes or significant reporting requirements.

Reference

1 <https://www.psc.qld.gov.au/news-resources/changes-to-departments-of-government.aspx>