

Client-Centred Case Management

From Theory to Impact



Advocacy is inherently people focused. Effective advocacy helps individuals speak for themselves with the right support structures in place. But with increasing complexity across services, funding and compliance requirements case managers are often overwhelmed by fractured systems and processes that limit visibility, increase admin and ultimately reduce time spent with clients.

Client-centred case management changes that. It focuses on the whole person, their strengths, values, community and goals. It provides a structured transparent way to support their journey. With the right technology in place this approach not only improves client outcomes but also reduces staff stress and increases operational efficiency.



Client-Centred vs. Service-Centred Case Management



Client-centred approaches consider the full experience from the client's perspective and create environments conducive to self-determined care. When done well these principles lead to measurable improvements in both outcomes and engagement.

Why CRM Matters

Advocacy services often span multiple programs and funding streams. Without a consolidated view of each client and their funding history, staff are left to navigate a disconnected maze of spreadsheets, emails and legacy systems. For the client, the experience can also be traumatic as they find themselves repeating their story again and again to different staff.



A modern customer relationship management (CRM) platform provides:

- A 360-degree view of each client's journey
- Real-time data for planning, forecasting and compliance
- Streamlined communication across staff and clients
- Automated documentation, consent and reporting workflows

Funding in particular is easier to track and report on when integrated into the case lifecycle ensuring services are aligned with eligibility and delivery requirements.

Case Study:

DA NSW's Transformation

Disability Advocacy NSW (DA NSW) supports over 30,000 people with disability across two-thirds of NSW. With demand at a peak, they were facing significant service delays, disjointed workflows, and minimal visibility into case progress or reporting.

THE CHALLENGES

- Waitlists stretched up to 6 months
- Case resolution took 5–6 months
- Staff burnout and low morale
- Manual reporting and poor data quality

THE SOLUTION

Partnering with SalesFix, DA NSW transitioned to a customised Salesforce solution featuring:

- Guided workflows for consistent case handling
- SMS Magic for mobile-first communication
- Formstack for efficient document management
- Survey Sparrow for feedback and risk assessments

Automation was embedded to reduce admin, improve data capture and ensure transparency across the entire case journey.

THE OUTCOMES

- Resolution time reduced to <70 days
- Waitlists reduced across 8 teams
- 15 hours average support per case
- Staff morale significantly improved
- Dashboards enabled 1-click oversight

"We had low quality data and couldn't support people in the client-centred manner we wanted to. It was causing distress for our staff. Now, technology is helping deliver the ideal outcome for both staff and our clients."

Amanda Brickwood, Executive Officer,
DA NSW

Implementing Client-Centred Case Management

A modern person-first approach requires:

1. **Reframing your model:** Shift from reactive to proactive case support
2. **Understanding your data:** Know what you need to collect, share and validate
3. **Selecting the right tools:** Ensure your CRM supports your people and process
4. **Partnering for success:** Work with experts who understand human services

Ready to Get Started?

SalesFix helps advocacy and community service organisations design Salesforce-based case management systems that put people first. Whether you're aiming to reduce admin, meet funding requirements or provide better care we're here to help.



Speak to our For Purpose Practice Manager today.

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