

TASC NATIONAL

This organisation operates across a vast area of southern Queensland with a strong focus on low to middle income citizens. TASC National offers legal help in areas like family law, domestic and family violence, civil and consumer law, and minor criminal matters while also providing free advocacy and social justice services. This includes support for discrimination, human rights concerns like abuse and neglect, problems with services and agencies (such as NDIS), as well as tenancy issues.

Searching for a better way to support their community

- TASC was using two separate systems to support its clients which made case management tricky. The organisation wanted to support front-end workers and focus on a higher level of client-centred support by taking away some of the backend administrative burden.
- Reporting into funders was challenging. Drawing data from multiple systems required extensive time investment to collate, analyse and format while keeping pace with evolving data collection points.
- Alignment was important to ensure the best possible solution could be developed for clients and staff. TASC conducted a thorough evaluation panel to find the right partner.

Custom work on conflict checks

- The build focused on case management and the needs of TASC clients alongside frontline staff - social workers, solicitors, advocates and the client engagement team. The build phase was completed through 4 development sprints, kept on budget and on-time through effective prioritisation, communication and project management.
- Custom work was required to develop a robust and highly functional Conflict Check process. A necessary procedure for legal support, this work brought all client data together into one record ensuring ethical case intake through thorough conflict of interest checks as well as providing one source of truth for client backgrounds and coordination efforts. A welcomed side-effect was the streamlining of client support through this development.
- The migration process was smooth. Downtime consisted of the suspension of 1.5 days of client work while training was delivered. This was backed up with a comprehensive training document.

Background

- Approximately 2,500 people supported annually
- Services a +400,000 sq km regional area
- Operating since 1982

Challenges

- Client support platforms were inadequate
- Time consuming reporting obligations
- Wanted an aligned partner

“Our evaluation process was designed to ensure that our funding is spent wisely. SalesFix’s team were all deeply knowledgeable about the actual working capabilities of Salesforce and fully engaged in suggesting how we could use the system to best suit the needs of both our clients and our staff.”

TASC Project Lead

Early days with future potential in sight

- Recently went live - no data/outcomes as yet
- TASC sees huge potential in how the organisation will be able to understand its clients, discover trends, patterns or service gaps, and allow its staff to focus on delivering exceptional levels of client-centred support.

Even though it's only been a few weeks since our solution went live, we've already identified a list of opportunities and enhancements we'd like to tackle in the future once time and budget permit."

TASC Project Lead

Feedback received by SalesFix team

"We had a very tight timeline and budget for the design, build, and implementation of our Salesforce system. SalesFix worked with us to deliver the project on time and on budget. They worked as genuine partners to solve problems and ensure the system met our needs. They were clear about project deliverables and flagged any issues with us proactively and in a timely manner. When differences of opinion arose we were able to work through them professionally and constructively to find a solution. The final system build has been extremely well received by end users. SalesFix was a great choice for us and I would highly recommend them."

Customer Solution

SALESFORCE NONPROFIT CLOUD

- Streamlined fundraising, program management, outcome management and case management

SALESFORCE SHIELD

- Enhanced protection, monitoring, and data retention for sensitive data with complex security and compliance requirements

EINSTEIN ACTIVITY CAPTURE

- Syncs data between Salesforce, email and calendar applications

DECLARATIVE LOOKUP ROLLUP SUMMARIES (DLRS) (3rd party tool)

- Complex data relationship management



Other Use Cases

Organisations working in the legal field, or currently using CLASS and/or IVO software can benefit from a solution like this that prioritises incredibly robust conflict checks alongside solid case management.