

# Improving care outcomes for vulnerable adults with automation and hands-on CRM training



## Services:

Advisory

Implementation

Managed Services

## Salesforce Products:

Sales Cloud

Marketing Cloud

## THE CHALLENGE: NEW LEGISLATION AND AN URGENT PROBLEM

In 2019 legislation was passed in South Australia to establish a new Adult Safeguarding Unit with a focus on safeguarding the rights of adults vulnerable to physical, financial or other kinds of abuse. An adult may be vulnerable due to age, disability, ill health, social isolation, dependence on others, or other disadvantages.

Anyone can report actual or suspected cases of neglect or abuse to the Unit and receive confidential support and advice. The Unit has statutory responsibility and accountability for receiving, assessing and responding to these reports and has the powers to gather information and refer matters to other agencies, including the police.

Once the legislation was passed, establishing the Unit became a priority and implementing an appropriate CRM a matter of urgency. The CRM would need to triage enquiries and reports, provide a single source of truth from which all data could be managed, and deliver a 360 degree view of

the vulnerable adult and appropriate insights into the key actors around this person including family, support workers, and aged care or retirement village providers.

The timeline was tight and the SA Health staff hadn't previously used Salesforce. But it was imperative that the Adult Safeguarding Unit get up and running to support vulnerable adults in the community.

**“With a case management solution up and running in under six weeks and an agile approach to on-the-job training, the Adult Safeguarding Unit team was able to immediately start triaging, managing and referring cases of suspected vulnerable adult abuse.”**

## THE SIMPLUS SOLUTIONS:

Design to go-live:  
6 weeks



### A two-phase approach

“With time of the essence, agility was critical and implementing the solution in two distinct phases meant priorities could be met in the right order,” explains the Account Executive at Simplus.

The initial phase involved standing up a case management model to meet the urgent requirements of the newly formed Unit. This included a core system set-up providing visibility of the vulnerable adult and key supporting stakeholders, the implementation of a fit-for-purpose case management process, and training for the staff involved. This minimum viable product (MVP) was stood up in six weeks from design through to go-live.

In the second phase, the focus moved to implementing a tracking functionality that encompassed the activities, organisations and relevant individuals around the vulnerable adult including government agencies, care providers, family and friends, community members, and alleged abusers.

Automations, process flows and templates were developed during this phase to streamline the reporting and assessment process.

Following the delivery of the second phase, the solution was transitioned to Simplus Managed Services – and the Managed Services team now continues to work in support of the Unit.



### Training and implementation side-by-side boosts efficiency and empowerment

Training new users took place across both phases of implementation again in such a way that the most time sensitive aspects of the project could be met.

While the staff had no experience using a CRM, they were extremely open to ways of working that would allow them to do their jobs efficiently and effectively.

In the first phase of the project we worked with the team on the ground, starting with the basics so they could get used to the system in a hands-on way.

“Rather than separating training from implementation, embedding the education process into the build itself was a very focused and effective way to empower the staff to come to grips with previously unfamiliar processes,” says the Simplus Account executive.

A second round of training took place in the latter phase of implementation whereby the team’s feedback could be fully integrated into adjustments and enhancements to automations.

“This meant everyone was on the same page and no expectations were left unmet when it came to delivering the product the team needed.”

## THE OUTCOME



Rapid implementation of a powerful case management solution for the Adult Safeguarding Unit. The first stage was up and running in just six weeks.



A 360-degree view of the vulnerable adult and the key stakeholders interacting with them.



A single source of truth and accurate records combined with automation to improve the triage process, care outcomes for vulnerable adults and case resolution times.



An on-the-ground, agile approach to training, which has empowered a team that previously had little or no experience using CRM technology, to provide confidential, timely and effective case management.



High levels of data security and compliance with key legislation including the Ageing and Adult Safeguarding Act 1995.

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### SIMPLUS ACCOUNT EXECUTIVE

Learn more about how Simplus partners with government agencies to maximise the value of Salesforce.

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