

# Salesforce CRM transforms incident reporting and case management at University of Sydney



## THE CHALLENGE

“Until now, my team and I had to access no less than nine separate systems to work through a referral from a student reporting an incident of distress,” recalls University of Sydney Head of Student Wellbeing Dr Benjamin Wilkes – part of his team sits within the newly established Safer Communities Office.

“And for the person reporting the incident, there were 17 versions of the reporting form to select from – all long and complicated. No wonder around 80% of people who started the reporting process didn’t finish it.”

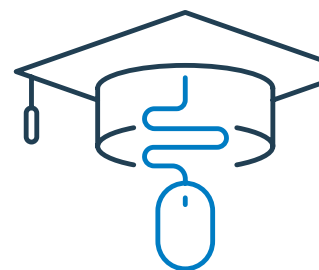
Along with many universities around Australia, Sydney took part in the 2021 National Student Safety Survey, which found the numbers of students who had experienced sexual harassment and assault since starting at the University of Sydney were higher than the national average. The result prompted an

apology from Vice-Chancellor Mark Scott and a promise to lead a culture of change.

The Safer Communities Office would play a critical role in that culture of change by providing trauma-informed case management and support to students and staff survivors of sexual misconduct.

But key to providing that support would be an effective reporting mechanism and a single source of truth to address student needs in a holistic and integrated way.

It was high time, then, for cumbersome legacy systems and a reporting process that alienated people before they’d even had a chance to tell their story to be replaced by streamlined, automation-enabled, accessible and intuitive solutions. Enter Wellbeing CRM, built with Salesforce technology.



# THE SIMPLUS SOLUTIONS



## Making reporting simple and human-centred

Seventeen permutations of the reporting form have now been reduced to one, which can be used by students, staff, guests or members of the public. It features a maximum of 13 dynamic fields, all fields can be viewed without having to scroll and all but two fields are optional.

The same form can be used by staff to record a report provided over the phone, via email or in-person to a member of the Safer Communities team.

As each incident is reported, it lands in a queue monitored by the Safer Communities team. A team member makes contact with the person reporting and converts the report into a case for longer-term management through the Wellbeing CRM.



## Finding synchronicity with a single source of truth

The Safer Communities office is made up of multiple teams, each with psychologists and administrative staff. Without a seamless appointment process, case management system and integration of data, people and details could fall through the cracks.

“Collaboration enabled by a single source of truth was critical to achieving the kind of synchronicity we needed to manage cases appropriately, thoroughly and sensitively,” says Dr Wilkes.

Wellbeing CRM provides that single source of truth so that all correspondence and updates are in one place, and appropriate information is made available only to the relevant staff member to protect privacy and confidentiality.

The new integrated booking system has also given students more autonomy about managing their own appointments with counsellors and other specialised support. Appointments could previously only be booked on the phone during business hours. Now students can schedule, amend and cancel appointments via an online portal.



## Respecting the challenge of adoption

An agile approach to training and change management in situ enabled quick responses to feedback from the Safer Communities team.

As a starting point, the user interface was designed to mimic that of the wellbeing team's existing systems, replicating naming conventions and placement where appropriate, adapting functionality where needed, and modernising the look and feel throughout.

As a pilot team for the Wellbeing CRM that will ultimately be rolled out across and beyond the university's wellbeing function, the Safer Communities staff then provided valuable insights into what changes were needed and where it would be useful to reduce duplication.

"The system has been designed, built, refined, optimised, trained and tested in lockstep with the Safer Communities Office team," says Dr Wilkes.



“From the point of referral and throughout the entire period of care, we want to put the right information in front of the proper practitioner when they need it, so they can make healthy decisions about how to interact with and care for the student in front of them.”

**DR BENJAMIN WILKES,**  
UNIVERSITY OF SYDNEY



# THE OUTCOME

User testing remains a focus as the University prepares to roll out the Wellbeing CRM to a wider user group. In the meantime, those reporting incidents of distress are no longer forced to wrangle with an alienating reporting process, and the staff receiving those reports are able to provide support with far greater confidence and efficiency.

“The single dynamic reporting form linked to our CRM enables a much smoother experience,” explains Dr Wilkes. “Importantly, it allows people to make choices along the way about how much information they want to submit at any given time. Offering choice, flexibility and support through the process is critical to helping people feel confident their report will be taken seriously.

“Our key priority was to build a system that gives a complete picture of a student and their needs so we can address them in an integrated

and holistic way. This is what Wellbeing CRM has provided.”

The Safer Communities Office has been an extraordinarily valuable pilot team whose expertise and experience have helped Simplus design and create a future-ready solution that will operate across and beyond the University’s wellbeing team to address a wide range of issues, incidents and challenges.

“The point is to get the system to act quickly with the information it has so we can focus on human interaction.”

**DR BENJAMIN WILKES**  
UNIVERSITY OF SYDNEY

## KEY RESULTS

### Before:



**17** possible reporting forms



**9** data collection systems reduced to one



Appointments could only be booked over the phone

### After:

**1**

dynamic reporting form

**1**

single source of truth

Self-serve appointment scheduling

Learn more about how Simplus partners with higher education institutions to maximise the value of Salesforce.

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