

Brooke

Creating a streamlined, digitalised process for grant applications for the vulnerable community

Building an online grants submission portal using Salesforce Public Sector Solutions



Background

Our client has primary responsibility for leading the delivery of support payments to a vulnerable section of the community.

Parliament tasked our client's business unit to manage a scheme whereby eligible members of the community could apply for payments and services as a redress for past trauma experienced.

The Problem

The client had an extremely tight timeframe in which to implement a new online portal for accepting applications as part of this scheme. With less than four weeks to the Go Live date, following an announcement to the public about the package, Brooke and the client worked together to design, build and deploy a new digital portal for this vulnerable section of the community.

The existing process that accepted applications for the scheme was a paper based, manual process. Our client needed to find a way to streamline this process and make it accessible to the vulnerable community, and wider stakeholder groups who may apply on their behalf.

They needed a solution as part of phase 1 of this project that:

- Could accept applications for payments or services online,
- Could deliver an efficient, seamless experience for both the vulnerable community and stakeholders it served, along with the small team in the client's business unit,
- Could deliver a case management system [leveraging the Salesforce platform] that could deliver critical enterprise workflows and access to data that could enable the client's staff to deliver the scheme to the vulnerable community,
- Could be stood up quickly, with a three-week turnaround time.



How did we think differently to deliver?

Brooke understood the client's vision and quickly aligned with what had to be implemented to achieve it. We understood the tight timeframe the team was working to, the importance of critical stakeholder requirements, and the complexity of their needs due to our extensive expertise in the public sector. With the ability to be agile, Brooke could engage quickly, stand up the project immediately and, due to our partnership with Salesforce, work with Salesforce to deliver the project on time.

We knew success was achieved when

- The digital portal was implemented and accepting applications,
- The applicants' forms could be submitted and managed,
- The Salesforce case management system was implemented,
- Staff were confidently working with the new Salesforce platform.

Doing differently

Brooke and the client delivered the grants submissions portal to accept applications in the very tight timeframe required, and on budget.

The client's team was well positioned to continue to build and streamline the case management system and process, to ensure applications continued to be processed efficiently and effectively to distribute funds to support the vulnerable community.

Meaningful results

- Efficient and streamlined processes,
- Applications are being accepted from the community,
- Client and community confidence in the system and process,
- Dashboard results as at 6 September 2022

Phase 2

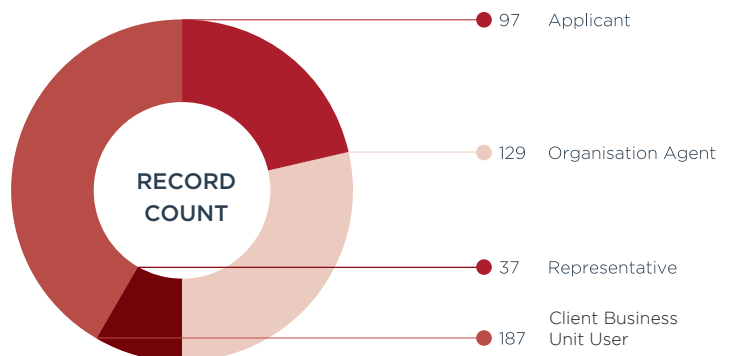
Brooke further collaborated with the client to deliver requirements to progress applications received, including use of eligibility rules for payments and ability for payments to be made.

More meaningful results delivered in Phase 2

- Numerous content changes that were designed and deployed to improve the end user's application process experience, addressing feedback received from members of the community,
- Functionality delivered for the client to undertake research and assessment of the applications, add action plans, update funding requests and ensure the Financial and Support Reparations are tracked accordingly,
- Development of the In-App guidance to provide dynamic, embedded documentation within the application for the team,
- Handover to Managed Support team after go-live.

Products implemented in phase 1

- Salesforce Service Cloud,
- Salesforce Public Sector Foundation (PSF)
- Salesforce Outbound Funds Management
- Salesforce Experience Cloud
- Salesforce OmniStudio



Feedback received from the client

'Brooke has done a sensational job in what has been an extremely challenging project. The project timelines were very tight and being a high-profile initiative, a delay would have reflected poorly on the department. Furthermore, this was a brand-new business unit with no existing processes so requirements constantly evolving. Through all that uncertainty, the Brooke team was extremely patient and supportive whilst willing to accommodate our needs to ensure a positive outcome for our clients.

I would not hesitate to recommend Brooke's quality of work and can-do attitude to prospective clients.

**As written on Salesforce App Xchange.*