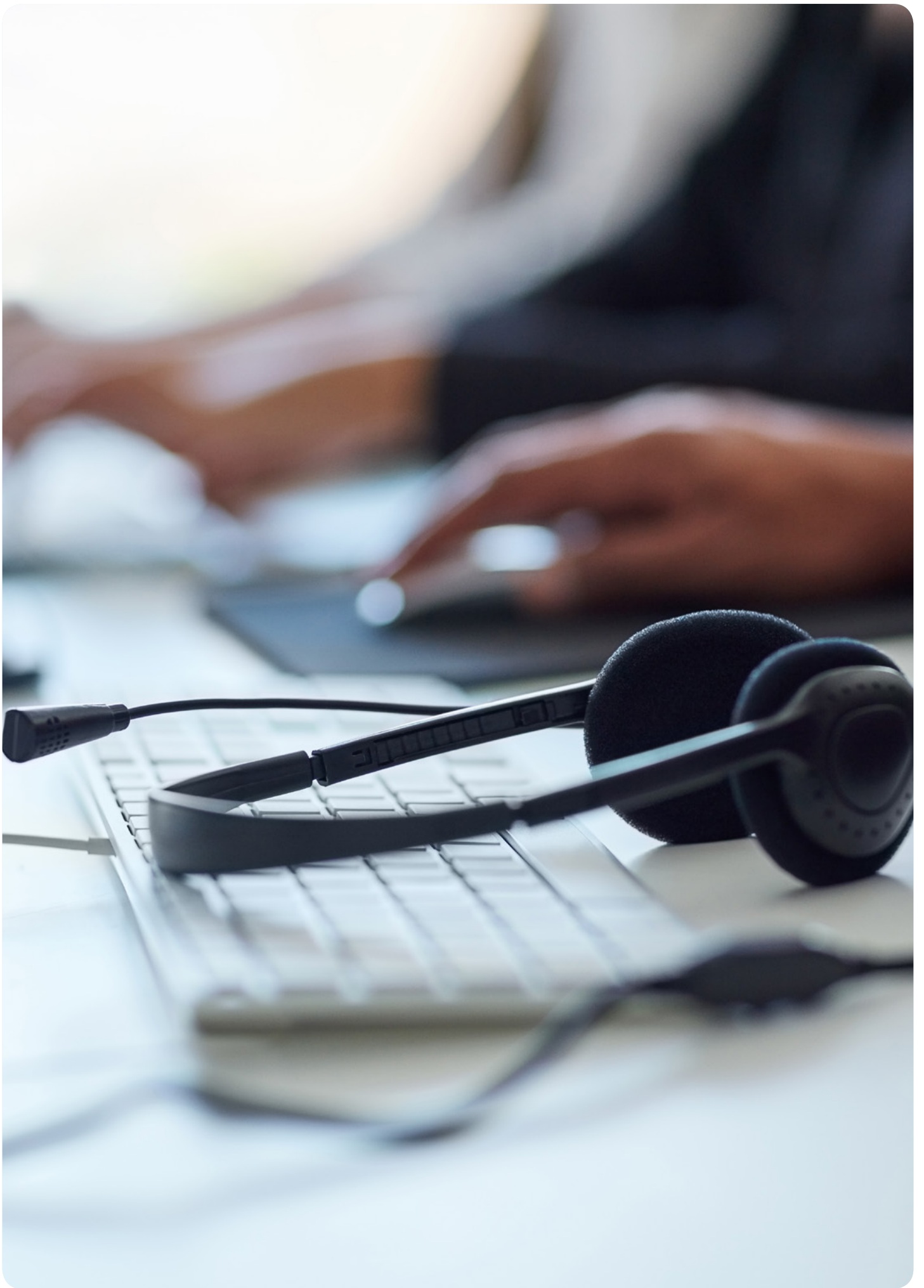




For Purpose Commercial Solutions





Introducing For Purpose Commercial Solutions

For Purpose Commercial Solutions (FPCS) provides a unique range of shared services and technology capabilities ideally suited to supporting for-purpose organisations.

Our services are based on the expertise and experience developed within Diabetes Victoria, the leading charity and peak consumer body working to reduce the impact of diabetes within our community since 1953.

Beginning in 2011, Diabetes Victoria transformed its technology from disparate and legacy business systems and databases to current day, best-of-breed and integrated cloud technology solutions.

Since then, we have worked with other organisations to deliver similar solutions and grown to be one of the largest Salesforce adopters in the for-purpose organisations sector within Australia.

As our operations expanded, so too did our capabilities with integration to other critical business applications such as CMS, eCommerce, digital marketing automation, service centre based on SaaS telephony platform and BI reporting.

Whilst building our capabilities in these areas, we identified many other for-purpose organisations dealing with similar issues. For Purpose Commercial Solutions was established to deliver significant business improvements for other organisations.

Our Solutions for Your Organisation

For Purpose Commercial Solutions offers a range of commercial solutions for small to medium for-purpose organisations, delivering customised Salesforce solutions outlined below.

Our team are Salesforce.com certified and will partner with you to ensure you get more from your investment in Salesforce.

Common challenges faced by for-purpose organisations	Meeting the challenges with FPCS
Disparate business systems and no single (CRM) view of Members, Donors and Supporters	Central view of the contact from Salesforce NPSP Implementation and Migration
Business activities and KPIs are difficult to measure or not available in a timely and accurate manner	Central dashboards/ reporting through Custom Reporting and Data Analytics
Ineffective and costly email and sms blasts to customers with no segmentation and/or engagement tracking	Targeted and tracked Digital Marketing and Communication Campaign Delivery
Lack of customer facing support capabilities with integration to critical business systems	Multichannel and integrated Managed Service Centre (Inbound & Outbound)
Back office Salesforce administration and support not available post/during the implementation	Certified Salesforce Admin delivering Training and Support



Key Services include the following

1 Salesforce NPSP Implementation and Migration

salesforce

Membership Management

- Single view of Members and households
- Membership sign-up and renewal/reminder automation
- Relationships and organization affiliations

Donation and Grant Management

- Integrated donation forms to process transactions via website and Salesforce
- Track donations & manage grants, bequests, appeals
- Recurring donations and pledges
- Household giving history
- Giving campaigns, soft credits and matching gifts

Engagement Management

- Define & track engagement levels of constituents
- Engagement with major donors

Engagement with program participants

- Digital Marketing and Communications
- Email and SMS campaigns with historical tracking, analytics
- Journey automation

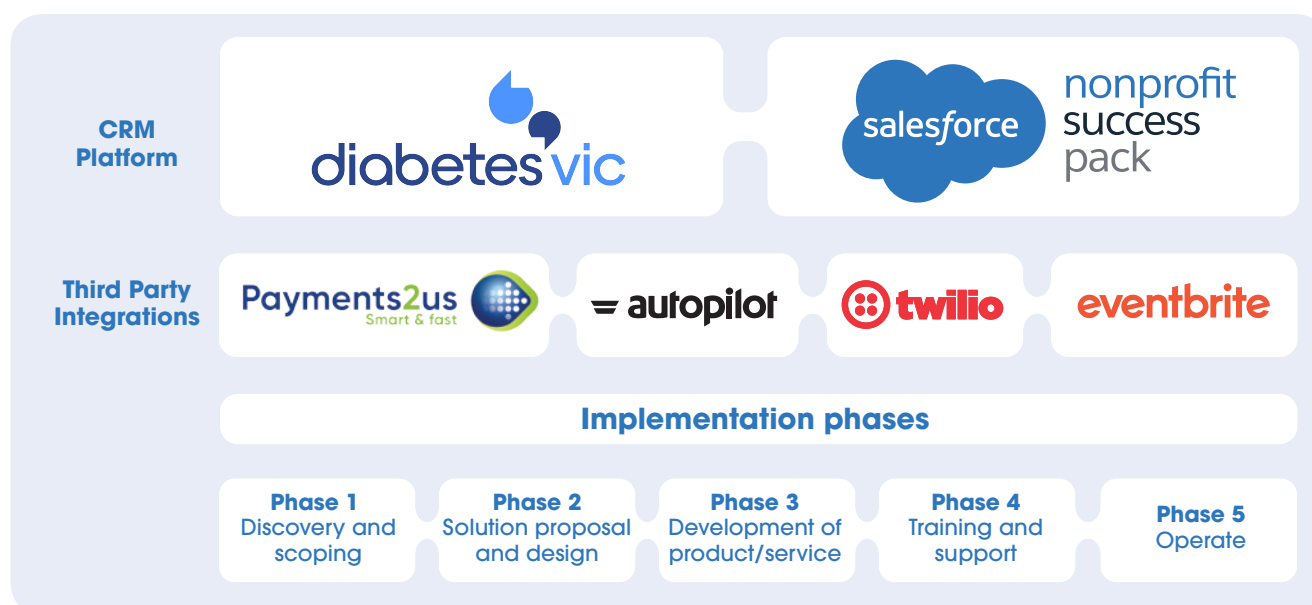
Other

- Case Management
- Campaign Management
- Event Management

Database Migration

- Transfer of data from legacy system(s) to Salesforce
- Define proper mapping requirements
- Clean, optimize, de-dupe and validate source data prior to migration
- Create custom reports to validate record counts and migration summary
- Review exception report to identify data not migrated

Our Approach is Integrated and Proven



2 Custom Reporting and Data Analytics



- Prepare and create reports to assist with ongoing (i.e., weekly, quarterly and annual) performance and quality management;
- Produce reports that provide insights and campaign success metrics at all stages of any given campaign;
- Design and run data extraction/segmentation to support targeted campaign strategies using a range of data tools and sources
- Develop and implement variation of standard report templates, drill-down reporting templates, summary dashboards and other data visualisations templates (i.e., charts, geospatial);
- Produce analysis that will inform the organisation of cohorts to communicate with (i.e., leads) and via which preferred channel (i.e., outbound call, direct mail, email or SMS); and
- Produce applicable technical documentations to support data management processes.

3 Digital Marketing and Communication Campaign Delivery



- Consultation to determine requirements and the critical success factor of campaigns;
- Source and develop filtered data extensions based on segmentation criteria/exclusions;
- Development and integration of assets, including email and SMS content;
- Scheduling and monitoring of campaign progress; and
- Post campaign reporting and review.

4 Managed Service Centre (Inbound & Outbound)



Fully managed Service Centre delivering inbound (inquiries, support, bookings) and outbound (sales, campaigns) activities.

Location

- Metropolitan and modern facilities with capacity to easily scale up as required
- Large catchment area to attract and keep high calibre staff for future growth
- Metropolitan and modern facilities in Melbourne Victoria, with capacity to easily scale up as required.

People

- Highly skilled and experienced call agents
- Learning and development-oriented culture
- Flexibility and scalability through multiple employment models

Technology

- Sophisticated cloud telephony (Genesys PureCloud) and CRM systems, integrated for screen pops, caller id, automated voice recording and CRM activity logging
- Call blending and routing options based on channel, skills, teams and queues
- Outbound automated dialler capability based on Power, Predictive, Preview and Progressive
- Multi-channel communication options

5 Training and Support



- Basic Salesforce NPSP and third-party integration training sessions
- Monthly administration and support by a certified Salesforce team, managed via online service desk

6 Microsoft SharePoint Migration and Consultation



- Migration of on-premise file share system to SharePoint online with Office 365 integration;
- Records management, governance and document libraries; and
- SharePoint intranet and sites implementation.

What we deliver for you

- Reduced ICT maintenance risks, attributed to existing legacy and unsupported technologies
- Alleviate internal technical systems support for critical business applications
- Achieve higher systems availability for critical business applications
- Improved operational efficiencies by leveraging technology and automation
- Increased opportunities and more targeted approach for future campaigns, using historical trends (i.e., data -> information -> insights)
- Multiple communication channels (i.e., email and SMS) could be utilised to tailor and maximise campaigns based on the 'best tool for the job' approach
- Single source of truth for both Clients and Non-Client transactional data
- Enhanced reporting and dashboard capabilities, with both push/pull delivery options
- Cost of implementation recovered through reduced operational and administrative functions from more efficient processing and (where applicable) workflow automation
- Derived effectiveness in better targeted campaigns for greater conversion achieved through centralised contact and engagement history data



Our rates are very competitive, and if you would like to know more about our services, or to discuss your CRM systems, Salesforce needs or integration issues contact us on **1300 437 386** or **fpcs@diabetesvic.org.au**

Our Customers



More About Us

Salesforce is Diabetes Victoria's primary customer relationship management (CRM) platform, which manages our engagement with various stakeholders, providing a 360-degree view of our Members, Donors, and Supporters.

Our Mission

To help meet the business needs of our customers by combining best practices with contemporary technology and our unique for-purpose organisation industry knowledge, in delivering commercially viable solutions.

Meet Our Team

Our committed team brings together significant experience within the for-purpose organisation sector, combined with expertise in Business Transformation, Business Solutions, Finance & Commerce, ICT, Business Systems/Analytics and Customer Service. Our focus is your priorities and business needs.



Glen Noonan
Chief Executive Officer
Mobile Number: 0418 635 187

Prior to taking up his role as Diabetes Victoria's CEO in 2022, Glen was a Senior Partner with PwC where he worked for 33 years, including 24 years as a Partner.

Glen held a range of leadership roles with PwC, including leadership of the Transformation practice, leading market facing industry practices and leadership of major client accounts across multiple sectors.

Glen advised clients across Health, Government and Corporate Sectors, including in the areas of transformation, growth, operations and finance.

Glen joined Diabetes Victoria as a Director in 2011, before being elected President in 2019 and appointed CEO in 2022.



Lalith Abeysena
Chief Operating Officer
Mobile Number 0431 630 557

Lalith Abeysena is a Fellow member of the Institute of Chartered Management Accountants of UK and Member of the Management Information Systems of UK.

Lalith migrated to Australia in 1996 and worked in the capacity of an Executive Director in various medium sized private companies involved in manufacturing, wholesale & retail for twelve years.

Prior to migrating to Australia, Lalith worked for a subsidiary of an ASX 200 Company, in one of their operations based in Fiji, in the capacity of CFO/COO for nearly 10 years. His initial senior executive role was in Guyana, South America, working for a Bauxite mining company for 5 years in the capacity of a Senior Executive in Finance. He also worked in Saudi Arabia for a leading construction company as a Senior Executive in Finance.

Lalith joined Diabetes Victoria in the capacity of CFO/COO in 2008 and is responsible for Strategy, Governance, Business Transformation, Commercial Operations and Finance.

Our Awards



2014 Melbourne Design

https://awards.design/mel14/project.asp?ID=13494&Category_ID=6012



**melbourne
design
awards**

2014 Sydney Design

https://awards.design/syd14/project.asp?ID=13053&Category_ID=6060



2017 Genesys Giveback

<https://twitter.com/Genesys/status/867056597826228226>



**Australian Institute of
Project Management**

2018 PMAA - Organisation\Change Management (under Diabetes Australia, for National Helpline)

<https://www.aipm.com.au/awards/past-pmaa-winners/2018/awards-items/act-winner-2>



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