



# Team Astro

Out of this world, literally.

---

Abdul, Jia Xuan, Kaarthiges, Kay Leen,  
Michelle Nabella and Ren Jun.



**Thank You!**



# Agenda



- Introduction
- Challenges / Problem Statement
- Solutions
- Next Steps
- Q&A





# Introduction

About Team Astro.

# Introduction

## Who We Are

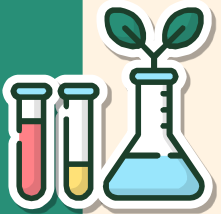
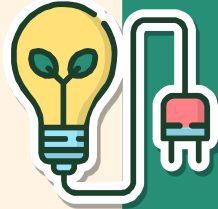
Astro Inc. was founded in 2000

Been in business for about 23 years

Our USP = Providing creatively engaging solutions for Salesforce adoption.

## Why We Are Here

To provide Halogen with a better contact management and overall CRM adoption in Salesforce.

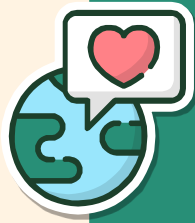




# Challenges / Problem Statement

What's the pressing matter?

# Challenges / Problem Statement



| <i><b>Problem</b></i>                             | <i><b>Solution</b></i>                               |
|---------------------------------------------------|------------------------------------------------------|
| 1. Lack of Engagement with Contacts               | Utilisation of Social Media Marketing                |
| 2. Better contact management system required      | Salesforce Email Flows, Customised Contact Record UI |
| 3. Tracking contact activities & timely follow up | Salesforce Flows & Activity History Usage            |
| 4. Review outreach and activities with contacts   | Reports & Dashboards via Customized Campaigns        |



# Solutions

In-depth explanation regarding solutions.



# Solution to Problem #1



## Lack of Engagement with Contacts

### **Overview**

- Social Media Marketing is currently being in the process of adoption.
- Utilising Marketing Cloud to push out content through Instagram and TikTok.
- Usage of a SMART Objective.

### **Instagram**

- “Aiming to have 5,000 followers by 6 months”.
- Fundraising Campaigns, Posts, Stories and Reels.
- Attending School Related Events through talks, workshops etc.
- Attaching Links in emails e.g Surveys, Social Media.

### **TikTok**

- Inactivity resulting in lower followings.
- “Achieving 1K followers on TikTok by 5 months.
- Posting regularly and keeping up with current trends.
- Brand Campaigns e.g short videos on Halogen and functions.
- Collaborations with external companies e.g Courts.
- Links attached to emails.



# Solution to Problem #1



## Marketing Strategies

### ***Types of Content***

- Customer Stories.
- Collaboration.
- Showcase of Events.

### ***Instagram***

- Informational articles with interesting updates.
- Behind-the-scenes stories.

### ***TikTok***

- Short videos between 30 and 60 seconds can be posted with a variety of content.
- Livestreams.

### ***Usage of Marketing Cloud / GPT***

- Distribute scheduled posts into social media platforms.
- Deliver personalized and relevant experiences much quickly and effectively.



# Solution to Problem #2



## In Need of a Better Contact Management System



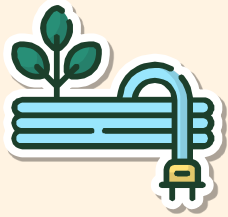
### **Overview**

- Using Salesforce Email Flows to generate automated emails based on algorithms.
- Implement distinct contact record types to categorize customers and consumers/donors, each with a unique page layout for tracking various events and performance data.
- Creation of a custom field: Contact Type.
- Implement data validation to prevent duplicate sign-ups with the same email address.
- Website will be web-to-lead based.

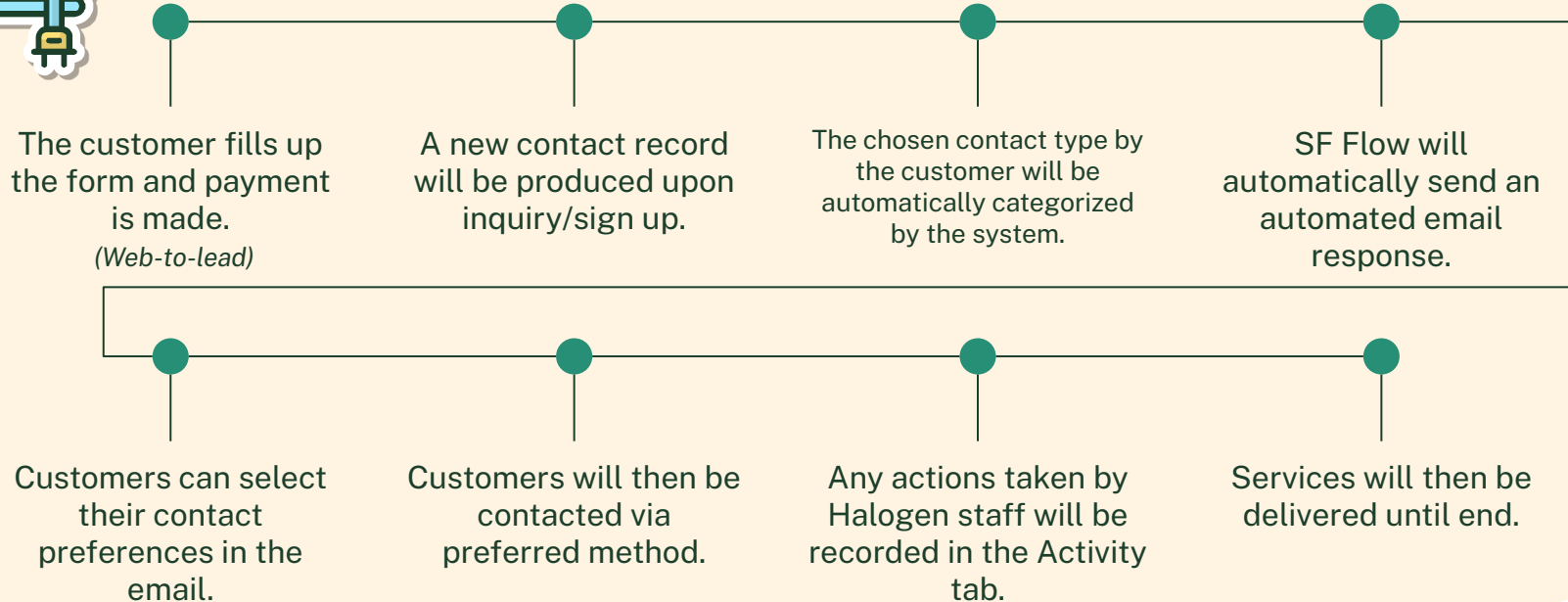
### **Benefits of using Flows**

- Gives way to automation. *(keeping track automatically)*
- Increased productivity.
- Increased efficiency.
- Data accuracy.





# Solution Process #1: Customer



# Sample 1 of 2: Automated Email

## Confirmation of Your Halogen Foundation Programme Purchase Inbox x



**Abdul Hairudin** <abdulputhinator@gmail.com>

to me ▾

22:57 (0 minutes ago)



Dear Abdul,

Thank you for choosing to participate in one of Halogen Foundation's inspiring programmes! We're thrilled to have you on board.

This is an automated confirmation email to acknowledge your recent programme purchase. Please find your invoice attached for your reference.

### Contact Preferences:

As part of our commitment to providing you with a personalized experience, we would like to know your communication preferences. You can choose to receive promotional emails from us via one of the following options:

- Email
- SMS
- I do not want to receive any promotional emails

Please select your preferred option above and reply to this email with your choice. Your preferences matter to us, and we want to ensure you receive updates and offers tailored to your interests.

### Stay Updated: SLC Facilitator Training

We're excited to inform you about our upcoming SLC Facilitator Training scheduled for November 23rd - 24th, 2023. This training will equip you with valuable skills and insights. To learn more and secure your spot, visit

<https://halogen.sg/slcft/>

For any questions or assistance, please feel free to reach out to our support team at [support@halogen.sg](mailto:support@halogen.sg).

Thank you for being a part of the Halogen Foundation community! We look forward to an enriching experience together.

Best regards,

Chew Hui  
Professional Trainer  
Halogen Foundation  
<https://halogen.sg/>

# Sample 2 of 2: Monthly Newsletter

SEPT 20, 2023

VOLUME 2

## Halogen

WEEKLY UPDATED HAPPENINGS



### SLC FACILITATOR TRAINING

The 2-day Student Leadership Challenge® (SLC) Facilitator Training Workshop is designed to bring professionals to a new level of leadership development to teach and facilitate The Five Practices of Exemplary Leadership® for students.

ACQUIRE SKILLS TO EXPLAIN AND INTERPRET STUDENTS' LEADERSHIP BEHAVIOURS THROUGH THE STUDENT LEADERSHIP PRACTICES INVENTORY®

### PRICING INFORMATION

Course Fee: \$2,000  
Early Bird Promotion\*: \$1,900  
Subsidised Rates for MOE Schools \$1,200

For MOE Schools: \$1,100 (Early Birds)  
\*Early bird promotion ends 30 days before the workshop date.

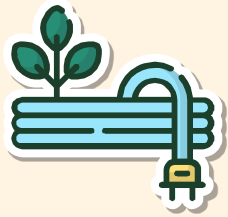
GLOBAL TRAINING PARTNER

## The Leadership Challenge®

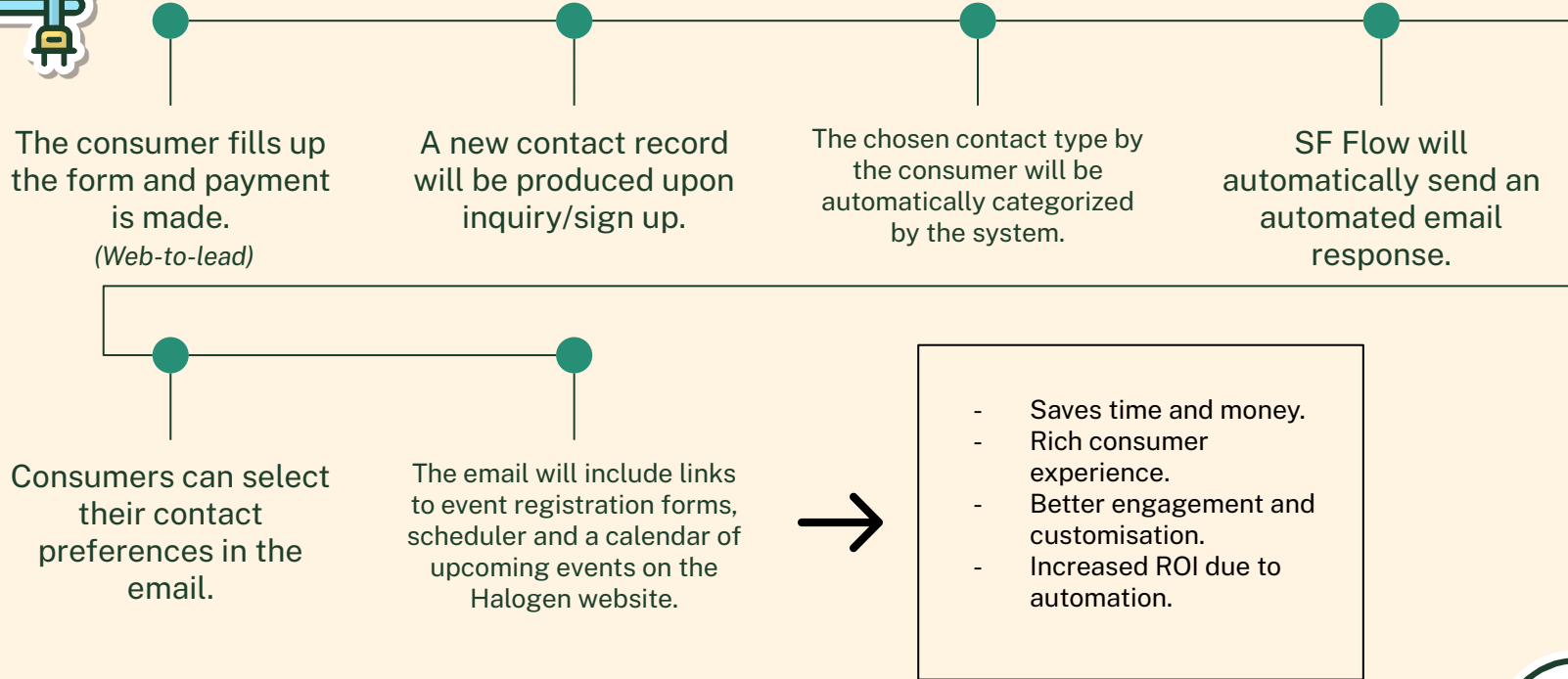
A Wiley Brand

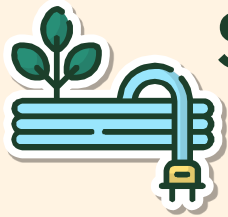
The Leadership Challenge® Series

[CLICK HERE TO FIND OUT MORE!](#)

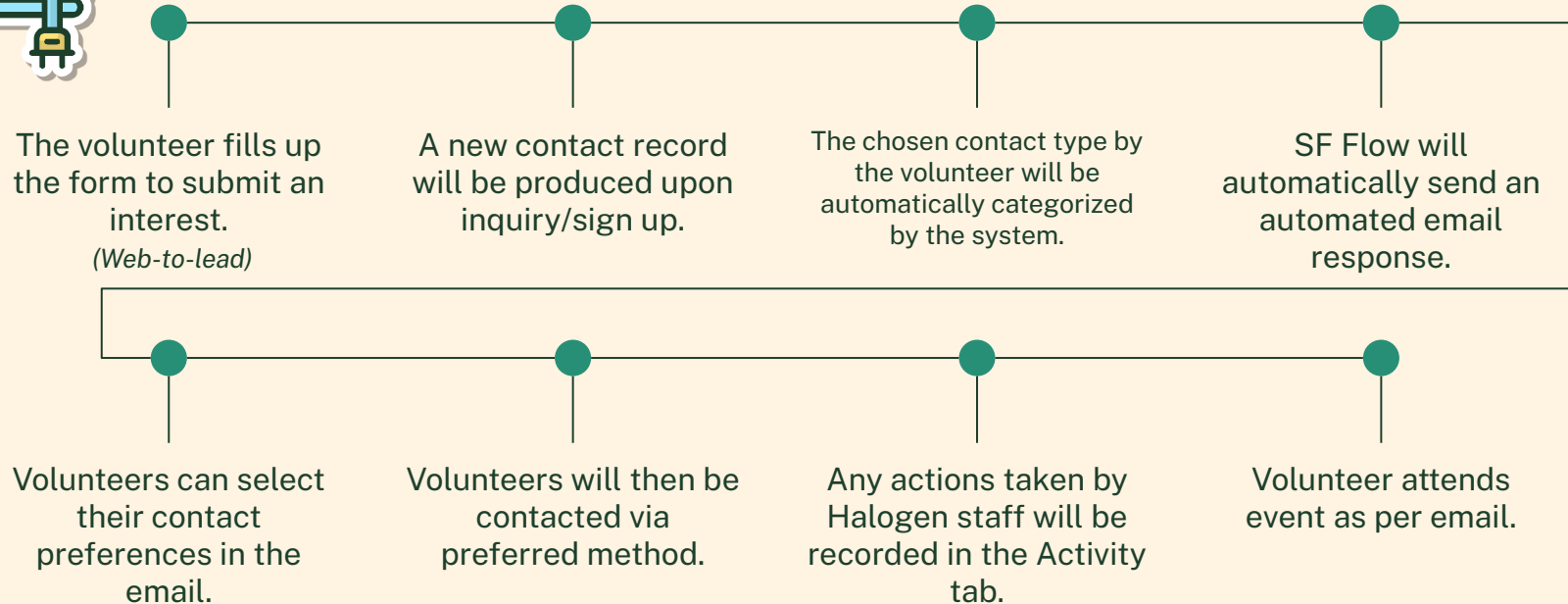


# Solution Process #2: Consumers





## Solution Process #3: Volunteers *(Pre-event)*





# Sample 1 of 1: Automated Email *(Volunteers)*



Abdul Hairudin <abdulputhinator@gmail.com>

to me ▾

00:04 (0 minutes ago)



Dear Michelle

We hope this message finds you well. We are thrilled to have you onboard as a volunteer for the upcoming "SLC - The Leadership Challenge" event, and we sincerely appreciate your dedication to making it a success.

Event Details:

Event Title: SLC - The Leadership Challenge

Date: November 23rd - 24th, 2023

Time: 10:00 AM - 5:00 PM

Location: 336 Smith St, #07-303, Singapore 050336

Reporting Time: 9:00 AM

Your Role and Responsibilities:

As a valued volunteer for this event, your role will be crucial in ensuring that everything runs smoothly. You will be an integral part of our team, contributing to the event's success. Your specific responsibilities will be revealed in a separate PDF email two days before the event. We appreciate your flexibility and commitment to making this event a memorable experience for all participants.

Contact Preferences:

Your engagement with us means a lot, and we want to respect your communication preferences. You have the option to choose how you'd like to stay connected with us for future volunteer opportunities and receive promotional emails:

- Email

- SMS

- I do not want to receive any promotional emails

Please select your preferred contact method(s) above and reply to this email with your choice. We will ensure that your preferences are respected.

Thank you once again for your enthusiasm and willingness to be a part of the Halogen Foundation family. We look forward to working with you at the "SLC - The Leadership Challenge" event and creating an impactful experience together.

If you have any immediate questions or require further information, please feel free to reach out to us at [contact@halogen.sg](mailto:contact@halogen.sg).

Warm regards,

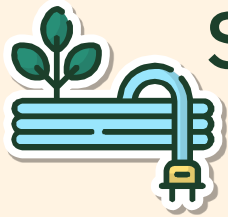
Jackson Ang

Volunteer Management

Halogen Foundation

<https://halogen.sg/>

This email is auto-generated, please do not reply to this email.



## Solution Process #3: Volunteers *(Post-event)*

Email is generated using SF Flow to express gratitude to them for attending the event and to offer information.

A survey link is also attached in the email.

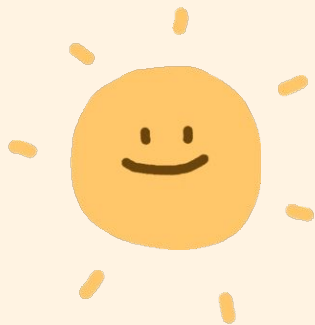
After confirming attendance, their hours will be recorded and ranked.  
*(Next Slide)*

A 'Type of Volunteer' field will also be added.  
*(Hangout, Huddle, Hustle)*

Their records will then be updated and a rank refresh will occur.



# Ranking System for Volunteers



## **#1 I'm The Sun!**

Volunteers will only achieve this title if they have volunteered above 100 hours in total. (*Cumulative*)



## **#2 On The Moon!**

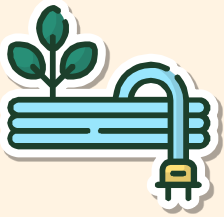
Volunteers will only achieve this title if they have volunteered 51 - 100 hours in total. (*Cumulative*)



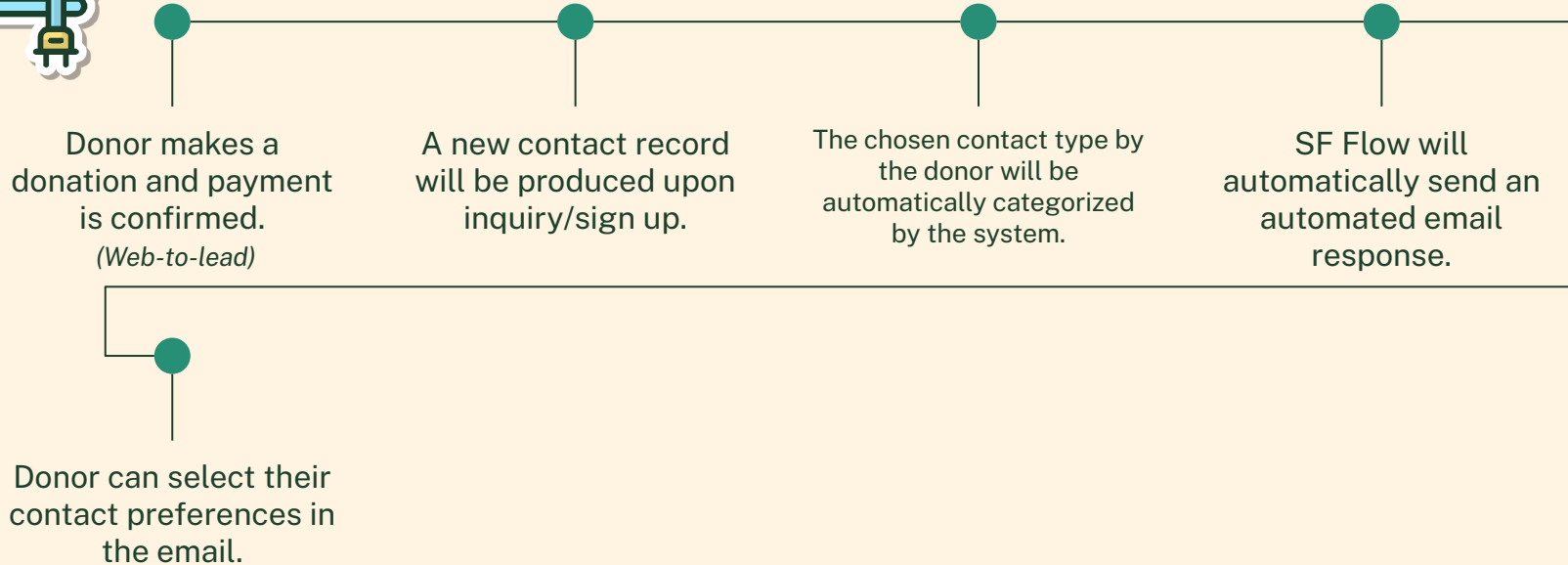
## **#3 What The Pluto?**

Volunteers will only achieve this title if they have volunteered 1 - 50 hours in total. (*Cumulative*)

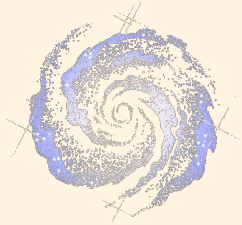
**Ranks will auto-reset every 2 months.**



## Solution Process #4: Donors

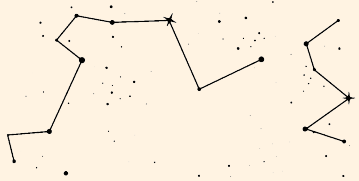


# Increasing Engagement with Donors



## #2 Galaxy

Donors will only achieve this title if they have donated \$1,001 - \$25,000 in total. (*Cumulative*)



## #3 Constellation

Donors will only achieve this title if they have donated \$101 - \$1000 in total. (*Cumulative*)



## #4 Stars

Donors will only achieve this title if they have donated \$10 - \$100 in total. (*Cumulative*)

# #1 UNIVERSE

Donors will only achieve this rare title if they have donated above \$25,000 in total. *(Cumulative)*

# Solution to Problem #3



## Keeping Track of Contact Activities & Timely Follow-up



### ***Activity History Usage***

- Utilising the Activity Tab to track client/contact activities.
- Provides a brief overview on activity done to engage the contact.
- Highly-customisable to suit Halogen's needs through the Lightning App Builder.

### ***Salesforce Flows***

- Automated emails can be sent out as confirmations and/or sharing of promotional materials with contacts through newsletters.
- Utilizing flows to update contact records with status changes, such as "Contacted," "Follow-up Required," or "Pending Response."
- Attaching survey/feedback form links with the email to collate information on contact satisfaction after a particular event has concluded.



# Solution to Problem #4



## Review the Outreach and Activities with Contacts

### **Overview**

- Measured through Objectives and Key Results (OKRs), focusing more on whether the team is on track in achieving the objective rather than numbers.

### **Performance**

- Measured through surveys (*customer feedback*), attendance and turnout rate with reports and dashboards.

### **Productivity**

- Measured by manpower and resource allocation (*the higher the ratio of trainers to trainees, the better*).

### **Transparency**

- Data Validation to ensure no overlapping of data.
- Each user will only be allowed to use 1 email to sign-in / log in with.
- Assign roles / profiles and editing permission sets to control who can edit, upload or read data. (*Public / Private view*)





## Measuring Performance and Productivity by adding custom fields such as ROI and Turnout Rate

 Campaign

**Halogen Marketing Event** 

| Type  | Status  | Start Date | End Date  |
|-------|---------|------------|-----------|
| Email | Planned | 27/9/2023  | 29/9/2023 |

Related

**Details**

Campaign Owner

 [Michelle Nabella](#)

Campaign Name

Halogen Marketing Event

Active

☐

Type

Email

Parent Campaign

Campaign Currency

USD - U.S. Dollar

Return On Investments (ROI)

10.00%

Turnout Rate

Description

Status

Planned

Approval Status

Approved

▼ Planning

Start Date

27/9/2023

Expected Revenue in Campaign

USD 1,000.00

End Date

29/9/2023

Budgeted Cost in Campaign

USD 5,000.00

## Adding additional custom fields such as Volunteers Acquired and Attended Volunteers to measure Volunteer Turnout Rate



 Campaign  
**Halogen Marketing Event** 

|                             |                          |                                                                                     |
|-----------------------------|--------------------------|-------------------------------------------------------------------------------------|
| Active                      | <input type="checkbox"/> |    |
| Type                        |                          |    |
| Email                       |                          |    |
| Parent Campaign             |                          |    |
| Campaign Currency           | USD - U.S. Dollar        |    |
| Return On Investments (ROI) | 10.00%                   |                                                                                     |
| Turnout Rate                |                          |                                                                                     |
| Description                 |                          |  |

 Planning

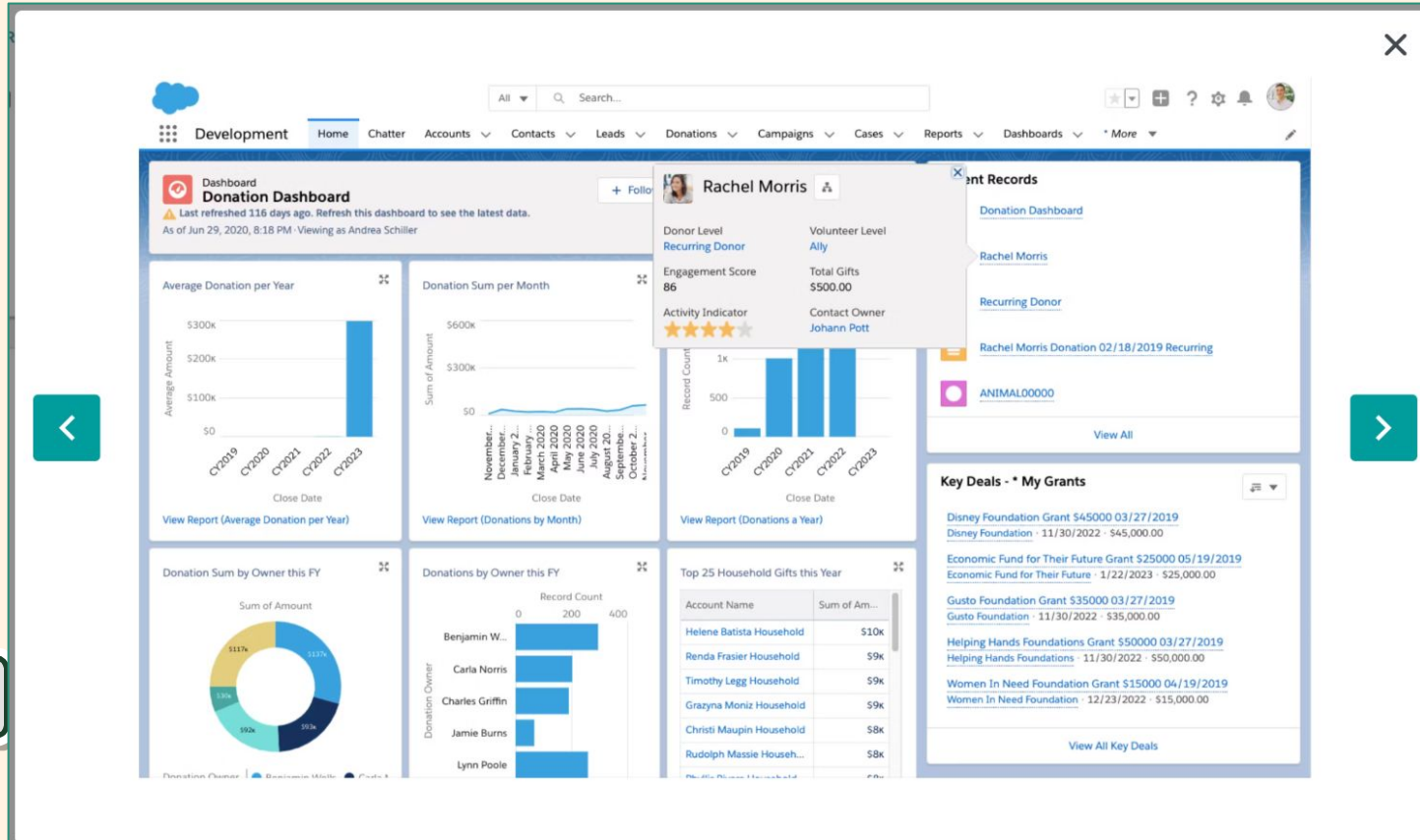
|                       |           |                                                                                   |                              |              |                                                                                     |
|-----------------------|-----------|-----------------------------------------------------------------------------------|------------------------------|--------------|-------------------------------------------------------------------------------------|
| Start Date            | 27/9/2023 |  | Expected Revenue in Campaign | USD 1,000.00 |  |
| End Date              | 29/9/2023 |  | Budgeted Cost in Campaign    | USD 5,000.00 |  |
| Num Sent in Campaign  |           |  | Actual Cost in Campaign      | USD 3,000.00 |  |
| Expected Response (%) | 0.00%     |  | Volunteers Acquired          | 27           |  |

 Event Performance

|                     |       |                                                                                       |
|---------------------|-------|---------------------------------------------------------------------------------------|
| Attended Volunteers | 22    |    |
| Funds Generated     | 3,300 |  |



# In-depth OKR Tracking Dashboard - Donor Management



# OKR Tracking Dashboard - Donor Contact Level Predictive Insights

The screenshot displays a user interface for managing donor contacts. At the top, a navigation bar includes a search bar and a menu with options like Development, Home, Chatter, Accounts, Contacts, Leads, Donations, Campaigns, Cases, Reports, Dashboards, and More. The main content area is titled 'Contact Mrs. Rachel Morris' and shows various metrics: Donor Level (Recurring Donor), Volunteer Level (Ally), Engagement Score (86), Total Gifts (\$500.00), Activity Indicator (5 stars), and Contact Owner (Johann Pott). A message states, 'We found no potential duplicates of this Contact.' Below this, a 'Details' tab is active, showing sections for Contact Details, Contact Information, Address Information, and Donation Information. The Donation Information section includes a table with fields like First Gift Date, Last Gift Date, Average Gift, Best Gift Year, Last Gift Amount, Largest Gift, Smallest Gift, and Best Gift Year Total. To the right, a profile card for Rachel Morris (Westport, CT) is shown, highlighting her status as a Major Donor with a Predicted Propensity to Give of 71%. The bottom right section, titled 'Activity', includes a 'Log a Call' button and a 'New Event' button, along with a filter bar.

Development Home Chatter Accounts Contacts Leads Donations Campaigns Cases Reports Dashboards More

Contact Mrs. Rachel Morris

+ Follow Edit Delete New Relationship

Donor Level Recurring Donor Volunteer Level Ally Engagement Score 86 Total Gifts \$500.00 Activity Indicator ★★★★★ Contact Owner Johann Pott

We found no potential duplicates of this Contact.

Details Related Documents Einstein

> Contact Details

> Contact Information

> Address Information

▼ Donation Information

|                 |            |                      |          |
|-----------------|------------|----------------------|----------|
| First Gift Date | 11/13/2020 | Last Gift Amount     | \$25.00  |
| Last Gift Date  | 11/23/2022 | Largest Gift         | \$25.00  |
| Average Gift    | \$25.00    | Smallest Gift        | \$10.00  |
| Best Gift Year  | 2022       | Best Gift Year Total | \$250.00 |

> Donation Totals

> Soft Credit Total

Rachel Morris Westport, CT

Major Donor Donor Development Donor \$4,050.00 500% above value

Predicted Propensity to Give 71%

They are highly active and engaged with your organization and are more likely to give.

Activity Chatter

Log a Call New Event

Recap your call... Add

Filters: All time • All activities • All types





# Next Steps

What will we be doing next?



## Attracting Halogen Employees to Adopt the CRM Platform



### ***Trailhead Academy***

- Free Courses.
- Self Directed Learning.
- Trailblazer community networking.

### ***Booking of Salesforce Trainings via Salesforce Trailhead Website***

- Lessons taught by Professional Instructors.
- Salesforce certificate preparation training.
- Covering Salesforce fundamentals.



# Benefits of Utilising Salesforce



## Data Centralisation

Salesforce CRM consolidates all customer data in one place, ensuring easy access, improving data accuracy and consistency to support informed decision-making.



## ROI Analysis

Businesses can conduct ROI analysis to measure the impact of CRM adoption, including cost savings, revenue growth, and efficiency improvements.



## Improved Customer Service

CRM streamlines customer support, leading to faster issue resolution and improved satisfaction, thanks to features like case management, automation, and knowledge bases.

# Thank You!

Any questions?

