



SUCCESS STORY DEEP DIVE

iCatalyst helps Kiind modernise CRM, streamline data, and improve reporting

Kiind is a not-for-profit based at Perth Children's Hospital (PCH) that supports parents and carers raising children and young people with disabilities aged 0 to 25. The organisation helps families navigate systems such as the National Disability Insurance Scheme (NDIS), health, and education, while also connecting them to community services and peers in similar circumstances. It runs in-hospital services, ward visits, and a dedicated centre at PCH.

Kiind used the same customer relationship management (CRM) system for many years, which eventually became outdated and unfit for purpose. The lack of integration with other tools created inefficiencies and required staff to spend time on manual processes instead of supporting families. By late 2021, Kiind began scoping out what it would need in a new CRM.

Simone Yandell was Kiind's Operations Manager and oversaw program delivery for families as well as the organisation's communications. "I oversaw all of our program delivery for families, and I also managed all of our communications," said Simone Yandell.

When Kiind decided to replace its old CRM, she searched for a partner who understood the organisation's work and could guide the process. iCatalyst came highly recommended through a personal contact and was chosen for its expertise and strong reputation.

That recommendation reflected iCatalyst's core value that reputation is everything, and it set the tone for a trusted partnership from the beginning.

BUILDING A SOLUTION AROUND KIIND'S UNIQUE NEEDS

iCatalyst worked with Kiind to scope, design, and implement a new CRM built on the Microsoft Dynamics 365 platform. The project started with internal workshops to identify needs, followed by sessions where iCatalyst's team presented different options highlighting pros and cons, and supported leaders in choosing the right solution.

A core part of its engagement was a weekly newsletter reaching around 5,000 families. More than a newsletter, it functions as an events and activities guide that keeps families connected and informed.

After careful consideration, Kiind implemented Microsoft Dynamics 365 Sales as its modern CRM solution. The platform unified website forms, communications, and reporting in one system. It integrated with Kiind's existing website to streamline new membership forms, allowing data to flow directly into the CRM and eliminating the need for staff to re-enter information manually.

“ The team communicated brilliantly, and the go-live just went flawlessly.

“Previously, we had a form on our old website which was just a web form. It would come through to an inbox, and our staff would manually input all the fields into the old CRM, so it was really time consuming,” said Carrie Clark, Chief Executive Officer at Kiind.

“Now that the website has an integrated form with the CRM, data automatically goes into the CRM and staff can review their membership straight away,” said Carrie Clark.

“As soon as someone's membership is approved, they're automatically added to our marketing list. The whole process, from start to finish, has made things much more efficient for our staff, and our service to members is now more professional and consistent.”

To improve communications, Kiind also adopted ClickDimensions, a marketing automation solution built for Microsoft Dynamics 365 Customer Engagement. Embedding campaign data into contact records gave staff full visibility of member communications and the ability to run automated campaigns. Integrated workflows reduced admin and created a true “one-stop shop” for staff.



“ We wouldn't have such a fantastic system today without iCatalyst's clear guidance.



STRONGER DATA MANAGEMENT AND STRATEGIC ANALYSIS

The CRM also improved how Kiind manages sensitive information. User permissions and contact alerts keep staff informed when working with families affected by domestic violence or court orders, protecting data privacy while maintaining service quality.

“We’ve got user permissions set up and that’s working really well,” said Carrie Clark.

“We’ve also switched on functionality that lets us create alerts on contact records. So, if a family is experiencing something our staff need to be careful about, an alert pops up to say not to share information with the previous partner. It’s been an extra layer of protection for our members and our team.”

With a modern CRM foundation, Kiind was able to optimise how the organisation works with data. Instead of piecing together reports from different systems or relying on memory, teams now have accurate, traceable, and instantly available insights.

“We wanted to be able to pull meaningful data from the CRM so we could quickly report back to funders on what we were delivering,” said Carrie Clark. “The new Power BI dashboards have been a game changer for us.”

Microsoft Power BI dashboards let managers see program usage, member demographics, and regional demand in real time. This visibility both supports internal decision-making and strengthens Kiind’s ability to report back to its board, apply for funding, and advocate with government agencies.

“The new Power BI dashboards have been a game changer for us.

“The real benefit goes beyond saving admin time. Our staff can now focus on supporting families instead of managing data, and our leaders have confidence that every decision is based on reliable information,” said Carrie Clark.

Before the project, staff had limited visibility into membership trends and regional service use. With Power BI, Kiind can now pull live insights at the click of a button, helping staff understand where families are located and how services are used.

“A great example is that the dashboards help us see what proportion of our membership lives in remote and regional areas,” said Carrie Clark. “If we can show a specific need, it helps with communications, as well as applying for relevant funding.”

As the system matured, Kiind and iCatalyst continued to build on its capabilities. Together, they added a bespoke systemic advocacy area to the CRM. This feature captures the issues families report when navigating systems such as NDIS, health, and education. It lets staff flag those issues in the system and use Power BI dashboards to see, at a glance, where families are experiencing difficulties. The team can then use this data to prepare reports and evidence for policymakers and government agencies.

“A really important part of our CRM is the bespoke area for systemic advocacy,” said Carrie Clark. “iCatalyst was phenomenal in guiding us through that scoping process. We can now quickly identify where families are experiencing challenges with NDIS, education, or health and use that data to report back to decision-makers. It has become an important piece of functionality that helps us advocate on behalf of families.”

CONTINUING TO EVOLVE TOGETHER

Kiind's CRM project with iCatalyst began as more than a one-off implementation; it marked the start of an ongoing relationship. From the earliest scoping sessions, iCatalyst guided Kiind's team with clarity, presenting different scenarios, outlining pros and cons, and helping leaders make informed decisions. This approach gave staff confidence in the process and delivered a system tailored to their needs.

"iCatalyst was honestly fantastic at keeping us in the loop throughout the process," said Carrie Clark. "The team communicated brilliantly, and the go-live just went flawlessly."

Ongoing support from iCatalyst consultants has helped embed the system as a true extension of Kiind's team. Power BI dashboards, custom features such as systemic advocacy tracking, and continuous enhancements have strengthened Kiind's ability to deliver services, track outcomes, and safeguard sensitive data.

"We wouldn't have such a fantastic system right now without iCatalyst's guidance," said Carrie Clark. "The team explained the technical side in ways that made sense for people without those skills."

This reflects iCatalyst's belief that reputation is everything, that credibility and trust are earned through long-term relationships, and that successful delivery is grounded in collective expertise and excellence.

"The iCatalyst team became like extended members of our staff," said Carrie Clark.

"The team responded quickly, demonstrated technical brilliance, and explained complex systems in ways that made sense to us. I really can't fault iCatalyst. It's been incredible."

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SOLUTIONS AND SERVICES DELIVERED:

- Microsoft Dynamics 365 Sales implementation
- Power BI dashboards for reporting to leadership, funders, and policymakers
- Custom systemic advocacy functionality
- Ongoing support and managed services



FEATURED CUSTOMER – KIIND

Kiind is a not-for-profit organisation based at Perth Children's Hospital (PCH).

The organisation supports parents and carers raising children and young people with disabilities aged 0 to 25. It helps families navigate complex systems such as the NDIS, health, and education, and connects them to financial support, community networks, and other families in similar circumstances.

For more information, visit kiind.com.au.

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