



## THE ORGANIZATION

The Highmark Caring Place champions the cause of grieving children by creating awareness of their needs, providing programs for them and their families, and empowering the community to effectively support them.

The first Caring Place facility opened in Pittsburgh in 1997. Since that time, the program has expanded across Pennsylvania to help thousands of community members each year at no cost through its peer support groups, education, consultation, and referral services.

## THE RESULTS

By partnering with TechImpact's consulting team and using ScreenSteps to create training documentation, The Highmark Caring Place had a successful implementation, and was able to immediately begin using Salesforce to fulfill their mission of serving the community more completely and efficiently.

The Highmark Caring Place now uses Salesforce to see a complete picture of its families, family members, volunteers and community partners - and ScreenSteps shows their organization how to do it all using Salesforce.

# THE HIGHMARK CARING PLACE

This Nonprofit organization improved Salesforce adoption during their Salesforce rollout by integrating ScreenSteps with Salesforce to provide visual training documentation.

## THE CHALLENGE

Managing thousands of grieving family members, volunteers, and community partnerships, The Highmark Caring Place needed a seamless way to coordinate efforts and communication so it could fulfill its mission of providing support for grieving children, adolescents, and their families. And while Salesforce was the obvious choice for optimizing operations and communications, implementing Salesforce in a nonprofit organization can be challenging.

Like many nonprofit organizations, The Highmark Caring Place doesn't use the typical Salesforce vernacular or workflows for its operations. It doesn't track sales leads - it tracks individuals who have passed away. It doesn't manage sales opportunities - it manages children who have lost a family member.

The Highmark Caring Place not only needed to tailor Salesforce to meet its unique organizational needs, it also needed a way to effectively, and efficiently, train its organization on how to use the new system.



ScreenSteps helps navigate employees through their questions about our new Salesforce system. The ScreenSteps search field embedded right within in Salesforce is an awesome feature, and has helped with the quick adoption of our help and training documentation.

## THE SOLUTION

In 2013, The Highmark Caring Place worked with TechImpact for the technical implementation of Salesforce, and selected ScreenSteps cloud software to create visual training documentation that integrated with Salesforce.

Because ScreenSteps made it easy to collaborate and coordinate the creation of help and training documentation, Highmark's three person team was able to quickly create over 80 Salesforce training articles using screenshots, image annotations, and text.

The result - Salesforce training documentation that was simple for everyone in the organization to follow and understand, and was available in time for The Highmark Caring Place's rollout of Salesforce.

ScreenSteps' integration with Salesforce made it easy for users to search for help documentation right within Salesforce so they could quickly find answers for questions about what to do and how to do it.