



MICROSOFT CRM 3.0 CASE STUDY FOR NFP

Fast Facts

Region: Sydney, NSW, Australia

Industry: Non-Profit

Customer Profile

Customer is a recognized non-profit leader in building a stronger and more vibrant community. Their mission is to inspire people to help others, increasing resources to meet needs and fostering innovative solutions to problems.

Business Situation

Using a combination of Microsoft Office Legacy CRM system, they did not have an efficient way to track donor information. Which Created daily hours of administrative task for the employees excel spreadsheets, paper document.

Solution

A Microsoft Dynamics CRM 3.0 implementation that is tightly integrated with Microsoft Outlook 2003 and other legacy systems.

Benefits

On-demand reporting of vital donor Statistics that previously took two months to compile.

- Increased field time for the staff because of decreased paper work.
- Availability of data in a mobile Environment
- Targeting marketing and communications That were not possible in the previous
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Services and Software

- Microsoft Dynamics CRM 3.0
- Microsoft Outlook 2003
- Microsoft .NET Framework
- ESS India CRM Implementation Methodology

“With Microsoft CRM, everyone wins but the number one group of people that wins is the donors because Microsoft CRM 3.0 helps to be as efficient as possible, and that makes us good stewards of donor resources.”

Microsoft Dynamics CRM, implemented by ESS, improves donor connections and improves fundraising efforts. The company sales staff was spending up to four hours per day doing paper based or manual activities. Microsoft CRM frees up the majority of this time to allow these same staff people more of this time to allow these same staff people more client and donor face time. Functionality includes fundraising, pledges / planned giving, membership, event management, client service delivery, merchandise, volunteers and staff, and more. Functionality can be made invisible on a role by role, or user by user basis, to simplify usability. Experience has been obtained with a number of major Australian not-for-profits with systems up to 260 users.

While the system has accounts receivable functionality, it integrates with a variety of financial packages, Verisign, and other payment gateways. Microsoft Dynamics Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence.

Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.



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Microsoft Dynamics CRM

<p>Situation Customer is a large independent Australian organization in the country. With a population base of almost 3,000,000 people, the organization garners donations from less than 1% of the population. This leaves a huge untapped potential donor base that the employees did not have time to reach. Connecting with their existing donor base and spending more time with potential donors is critical to the mission of the organization. The current systems in place at the client site did not facilitate easy, timely or personalized connections. In addition, the current system and paper-based data sources took away valuable field time from the clients representatives - time that could have been spent recruiting new clients and donors.</p>	<p>that was impossible before CRM was implemented at the organization.</p>
<p>Solution</p> <p>Microsoft Dynamics CRM 3.0 was implemented by ESS at Customer to provide the single source of client and donor information that was previously lacking in their CRM product and various paper-based tracking systems. Capitalizing on the tight integration of Microsoft Dynamics CRM with Microsoft Outlook 2003, the users were able to quickly adapt to the new system by using the intuitive, common Outlook interface that was already implemented at the client site. Custom application development was used to migrate existing data, integrate further with existing legacy systems and develop custom reports.</p>	<p>Data through the CRM system is now available in a matter of minutes which provides Customer to better plan future campaigns and provide management with statistics that previously took months to compile. This real-time access includes insight into how current campaigns are progressing which allows the management team to adjust activities accordingly to reach their goals.</p> <p>Field staff productivity is greatly improved as well. Field staff can now disconnect from the network and take their CRM data with them on their mobile device - providing critical client and calendar data for their meetings.</p>
<p>Benefits</p> <p>Customer has benefited tremendously from this new implementation. The organization counts this application as critical to its ability to newly connect with clients and donors in a much more strategic, targeted and easy manner. The Customer staff logged 18,000 donor related activities in the first year of implementation - visibility and tracking.</p>	<p>The marketing staff is finding out how powerful the tool is as well. Now the team can put together targeted newsletters and communications that were previously manual and very time-consuming. The companies that receive these communications feel a sense of connectedness that is meant to increase donor interest and awareness.</p> <p>One last benefit is the overall ease of use of the system; each year hundreds of temporary personnel are loaned to the organization and the system, with its familiar interface, allows the staff to train them in minimal time.</p> <p>The Event Management functionality modules of VitalDB are offered as a stand alone event management system.</p> <p>Bookings of seats and / or tables are available, with varying costs, food preferences if required, event sessions including their management, speakers, accommodation, and more. If some of the functionality is not required - eg multiple daily session management - it is not visible after event setup, to ensure intuitive user interaction with the system on an event by event basis.</p>