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Not-for-Profit Organization Moves from Grant Program to Microsoft Dynamics™ CRM improving employee productivity and proactive case management

The Arc of Dauphin and Lebanon Counties (The Arc) is a non-profit, membership organization with a primary purpose of providing services and supports, with dignity and respect, to persons of all ages with intellectual and developmental disabilities. Providing advocacy and access to educational, vocational, recreational and critical life skills programs, The Arc is an essential resource for consumers, their families and the community.

Background

The Arc was serving approximately 800 members using a grants software system to manage donations and paper, an old FoxPro database, Microsoft Excel and Access to manage their members, donors, and services. Each service area used a different program to track their information and nothing was shared amongst the entire organization. There was so much duplication that day-long meetings were required to sort lists.

Project

RSM McGladrey implemented Microsoft Dynamic™ CRM Business Solutions to be used by the entire organization. The goal of the first phase was to centralize the data for full use by all service areas and avoid duplication of efforts. Then, in phase two, create a system to track donations and programs.

In the end, functions were added which were outside the scope of the project, because Microsoft Dynamics CRM was easy to configure to the needs of The Arc. For example, systems were developed which improved member relations. The Arc would help create Individual Education Plans (IEP) then schedule follow-ups

for one month later asking about the plans and how they were working. In the past, The Arc would only communicate with families regarding IEPs when there were problems. Usually, the families were frustrated with the district and lawyers were involved. The new system configuration makes the process smoother for the members, families, and districts.

"Overall, the new CRM system has allowed The Arc to work more productivity and offer better member relations with no staffing changes. We are now asking ourselves, what we can do better and what programs we can develop to help us streamline our operations. RSM McGladrey were patient in explaining the process and created solutions for our needs."

— Matt George
The Arc of Dauphin and Lebanon Counties

Another benefit The Arc has experienced is a shortened response time to grant applications and the ability to respond to more applications. As a result, more money is received for their programs. Before Dynamics CRM was implemented, The Arc could not apply for grants because the application required too much information in a short span of time.

Outcomes

- Increase productivity through centralized database
- Proactive case management to improve member, family, and district relationships
- Enhance visibility into program attendance which allows for up-sell of other programs –

who attends camp but not educational programs?

- Approvals on grant applications – ability to apply for more and ease of completing application
- Move service responses from reactive to proactive
- Improve customer service - track all activity of consumer to report to care giver
- Work smarter than harder – do more without any staffing changes
- Reduce duplication of entry from different program groups