



## How a Not-For-Profit Organization **Optimized Their Operations** with Microsoft Dynamics CRM



### THE ORGANIZATION



Action main-d'oeuvre is a non-profit organization founded in 1983 with the mission to assist in the socio-economic integration of people with special needs into the job market.

The organization offers specialized services funded by Emploi-Québec, with the goal to help members located on the island of Montreal with intellectual disabilities and those who are on the autism spectrum integrate into the workforce.

### THE VISION

Action main-d'oeuvre, like the majority of not-for-profit organizations, was managing their entire operations through paper documents, Excel spreadsheets and Word files. These documents were not linked together therefore extrapolating information to create reports was a very long and manual process. The organization was looking for a system that would help them with the following:

- > **CONSOLIDATE ALL DETAILS REGARDING THEIR PARTICIPANTS AND RESOURCES**  
so that they may have all of their contact information as well as details on the statuses of their current activities and meetings all in one place.
- > **TRACK THEIR CURRENT AND PAST ACTIVITIES**  
with a centralized database where all of the agents at Action main-d'oeuvre can review past employments and past interventions of their participants so that they are able to respond in a more timely and effective manner.
- > **COLLECT AND COMPILE INFORMATION FOR VARIOUS REPORTS IN A MORE EFFICIENT MANNER**  
in order for the organization to be sure that all interventions have been documented in order to meet the target levels set by Emploi-Quebec so that they may continue to receive public funding.



Microsoft  
Dynamics CRM  
Online



Microsoft  
Dynamics CRM  
Accounts/Contacts  
module



Microsoft  
Dynamics CRM  
Activities  
functionality



Microsoft  
Dynamics CRM  
XRM  
module

## THE SOLUTION

When Action main-d'oeuvre started researching a potential solution, they required a system that would not be too costly and that did not have too many infrastructure needs. It was also important for them to find a system would be easy for their staff to learn and use so that they could easily adapt to this new application. Based on these criteria, the team at Action main-d'oeuvre decided to implement Microsoft Dynamics CRM Online.

Since they didn't already have an application in place, they took the time to list out and plan exactly what they wanted from their potential system. Their objective was to centralize their information in one place, so that all team members may have a better visibility into all of their participants' interactions, from their first meeting to employment follow-ups. This way, Action main-d'oeuvre would have access to the history on all of their participants in the program as well as details on the resources involved so that if in the case of an emergency, they would be able to quickly research the details of past interventions.

### Accounts/Contacts

All contact information for participants, employers and other support resources are entered into Microsoft Dynamics CRM. To simplify their searches, all contacts were identified based on their role and with this classification, they were able to include different information that may be pertinent to one group but not another.

### Activity-Tracking Functionality

Action main-d'oeuvre relies heavily on this functionality in order to structure and manage their day-to-day operations. They work with Microsoft Outlook calendars in order to schedule and link tasks relating to particular participants, events and meetings that include multiple resources. This functionality is also helpful when new participants start with the organization and are not sure who they were scheduled to meet. With a unified calendar, it is now easy to determine this information as well as to find the appropriate resources in case of emergencies.

### XRM: Personalized Entities

Due to the particularity of the services offered and the limited budget, they leveraged Dynamics CRM as a development platform in order to fill their other informational and operational needs. They are now able to store details regarding courses, training sessions, jobs and grants within the system. This helped them feel that the system was truly built around their specific needs, which is why they believe that they have been able to quickly adapt to their new system.

### Mobile Capabilities

There are staff members who are on the road full-time, so it was important that they could have the ability to access information from their mobile devices. With the mobile capabilities of Dynamics CRM, these staff members are able to access all of their information when they need it.

## THE BENEFITS

### 1 | EFFICIENCY AND AUTONOMY FOR THE USERS

Action main-d'oeuvre's main benefit is their gain in internal efficiencies and time savings across the organization. For example, when a staff member is entering information regarding one of their participants, they can enter this information directly into the system when they are on the phone. Previously, they would have had to transcribe the information into a paper document once the phone call was completed. Since a major part of staff member's time is spent on the phone, this represents a significant time-saving activity since there are no more duplicate entries.

### 2 | SPEED IN RESPONSE TIMES

There was also an increase in the speed of response times in regards to their services offered. Now, when an employer calls about an emergency, they can react much faster to the situation at hand since they are able to pull the information from the system rather than having to filter through archived paper documents.

### 3 | SIGNIFICANT REDUCTION IN THE NUMBER OF EXCEL FILES AND WORD DOCUMENTS

By bringing all contact information and activity details into Dynamics CRM, Action main-d'oeuvre was able to start managing their participants, resources and supplier information all from one place. Information sharing became even more important when they started working in conjunction with a second office located on the other side of the city, making it almost impossible to easily share paper files. With a CRM, details about a participant can be pulled at any time regardless of where their primary level of service is being offered.

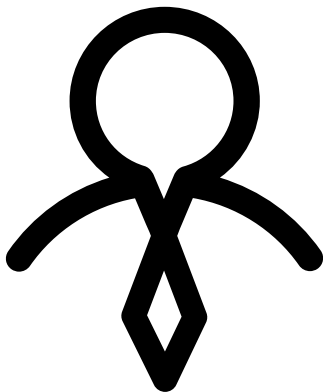
### 4 | BECOMING A PAPERLESS ORGANIZATION

Now that all information is being stored within Dynamics CRM, the amount of paper required across the organization has been significantly reduced. In addition to these cost savings, there is the ease of access to information and the security knowing that it is less likely to be misplaced or left on the desk of a colleague since all of the details are within the system. Previously, there was always a possibility that key information on the participants could go missing since it was only recorded on paper.

### 5 | INCREASED EFFICIENCY WHEN CREATING REPORTS AND ANALYZING STATISTICS

A view was created in Dynamics CRM to pull together all of the necessary information to complete their specific documents more quickly. Before implementing this solution, all information was gathered manually by filtering through the different Excel and Word files.

#### PROFESSIONAL SERVICES



JOVACO provided the following services

- > Consulting
- > Implementation
- > Customization
- > Personalized Views
- > Customer Support
- > Training

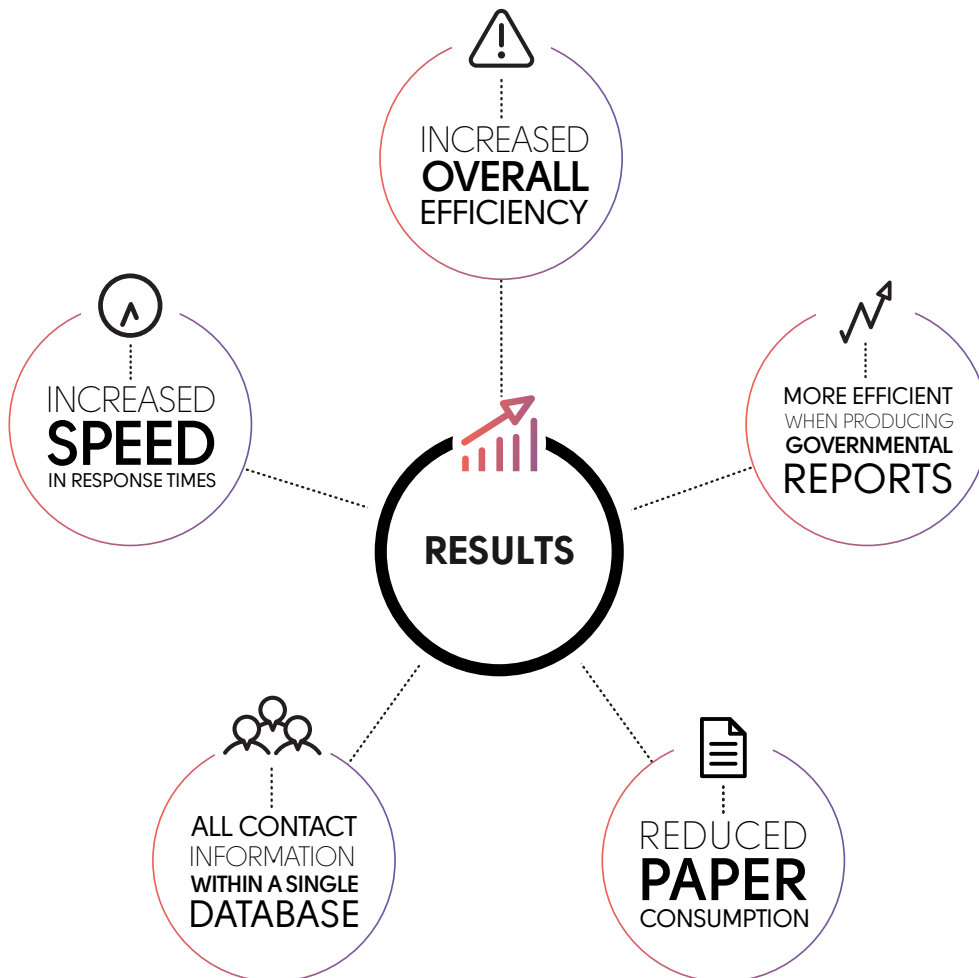
## THE RESULTS

Action main-d'oeuvre has been able to move all of their operations over to the Dynamics CRM system. Through several training sessions and encouraging their staff members to the use of the system, it has become a reflex across the organization to enter everything into the CRM. Action main-d'oeuvre is proud to say that they have been able to successfully make the shift from "an outdated paper culture to being up to date with the latest technologies".

After being on the system for less than a year, Microsoft Dynamics CRM Online has met their initial internal needs and they have made great progress in getting everyone ramped up on the system. The team feels that it has really helped them structure their organization and optimize their services, not only for the participants, but their various partners as well.

What the staff appreciates the most is the ease at which they were able to switch systems. They are convinced that they found a solution that is a perfect fit for their organization and that it has been adapted to meet their specific needs and activities.

“**WE FOUND A SYSTEM THAT IS A PERFECT FIT FOR OUR ORGANIZATION**”



## KEY SUCCESS FACTORS

### 1 | DO YOUR HOMEWORK

Action main-d'oeuvre had given the purchase of a CRM system a lot of thought and made a list with a clear vision of what they were looking for before they even started shopping around. Each system was evaluated based on these specific criteria so that they would be able to stay focused on what was important for them and what really mattered for their new system, which would have been difficult without their preliminary analysis.

### 2 | HAVE A CLEAR VISION OF WHAT YOU WANT AND BUILD A PLAN

Once their decision was made, the team carefully outlined what they wanted in regards to the forms, workflows and business processes before any of the configuration started. They felt that it was important that this was well thought out from the beginning so that once their team started using the system, users would feel comfortable since there would not be too many changes to the interface and business processes while staff members were still adapting to the new system.

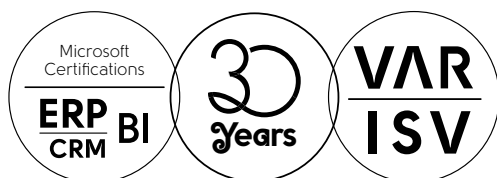
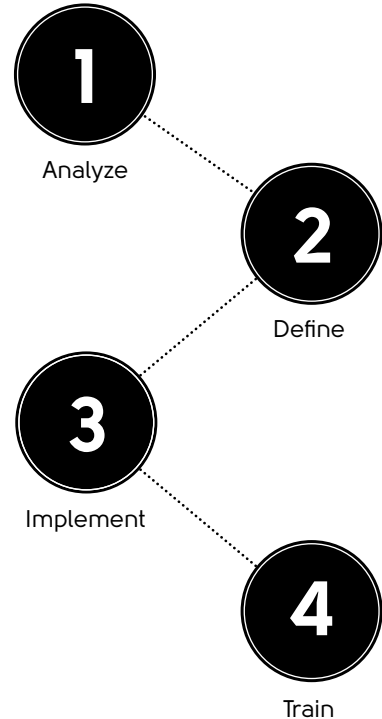
### 3 | MAKE REALISTIC TIMELINES FOR YOU AND YOUR TEAM

Action main-d'oeuvre was aware that this was going to be a major culture-shift for the entire organization. It was important for them to take their time to be sure it was done correctly and that everything was in place before they started tackling another goal. By taking the one-step-at-a-time approach, they were also available to evaluate who was catching on and who needed a little more support about getting ramped up on the new system.

### 4 | TAKE THE TIME TO LEARN THE SYSTEM

They knew that the adoption of the new system by the entire team wasn't going to happen overnight, so they planned training sessions, created user manuals and had two super-users who were always available to help out when users has questions so that they would not revert back to their old ways while waiting for answers to their questions.

The organization also encouraged all users to block time in their calendar to really take the time to learn the system. By making the staff feel at ease with the idea that this was a learning process and that it was normal to take more time in the beginning to adapt, this made the users feel more comfortable about the changes, which ultimately led to the success of the implementation.



JOVACO is a leader in the implementation and integration of solutions for the past 30 years. We work in partnership with your organization to ensure that your system meets your business needs.

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