Nonprofit Organization Increases Productivity and Operational Efficiency

Overview

Country or Region: United States
Industry: Education: K–12

Customer Profile

Seattle, Washington-based not-for-profit, Committee for Children (CfC) is recognized internationally for its violence prevention and its social and emotional educational curricula. CfC has 74 staff members and a U.S.$10.5 million annual budget.

Business Situation

CfC was using an out-of-date Macintosh-based accounting system that did not integrate with its customer relationship management (CRM) system; did not provide inventory, distribution, or reporting capabilities; and was no longer supported.

Solution

CfC implemented Microsoft Dynamics™ SL to provide accounting, distribution, project cost accounting, financial reporting, and budgeting capabilities and integrated it with its CRM system.

Benefits

- More efficient customer service
- Better control of financial data
- Improved decision making
- More efficient use of time

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Kelsie Longbrake, Accounting Manager, Committee for Children

Committee for Children (CfC) is a nonprofit organization dedicated to helping keep children safe. Its award-winning classroom programs focused on youth violence, bullying, child abuse, and personal safety reach millions of children and educators every year. CfC wanted to improve customer service and increase operational efficiency while devoting more resources to producing program content. To achieve those goals, CfC needed to replace its outdated Macintosh-based accounting system with a comprehensive system that combined distribution, reporting, budgeting, and accounting in a single solution. CfC chose Synergy Business Solutions to implement Microsoft Dynamics™ SL (formerly Microsoft® Business Solutions–Solomon®). With this solution, CfC was able to improve customer service, control access to financial data, make more strategic decisions, and increase productivity.

> "The key factor in inventory management is to not have any more on the shelf than you want, but not have any less than you need. The capabilities in Microsoft Dynamics SL help CfC achieve that balance."
>
> Jered Cady, President, Synergy Business Solutions

Situation

Committee for Children (CfC), a nonprofit organization based in Seattle, Washington, creates, publishes, and distributes award-winning programs and curricula focused on preventing youth violence and child abuse and improving personal safety. Each year, CfC programs reach millions of children and educators all over the world, teaching social, academic, and safety skills. The nonprofit also conducts evaluation research, writes articles and reviews of children's literature, provides assessment tools for schools and agencies, and offers training and ongoing support to educators and parents.

Since the early 1980s, all CfC content development had been done on the Macintosh operating environment. So when the organization implemented an accounting system, it chose Foresight Financials, a Macintosh-based accounting software package. The accounting package was designed for about 25 employees, which worked fine for awhile. However, as the company grew to more than 70 employees, the accounting software became obsolete and couldn't be upgraded.

In the interim, CfC had implemented a Windows®-based SalesLogix customer relationship management (CRM) system. It was very difficult for the organization to integrate its accounting system with the CRM system, or with any other system, such as a bank or payroll service. This lack of integration meant that CfC accounting workers had to manually enter a considerable amount of information into multiple systems. This was inefficient and provided no automated reporting capabilities and few controls to protect the integrity of the data. In addition, because the accounting software was no longer supported, if CfC employees had a problem, they had to solve it themselves with their three-person IT department.

By 2004, CfC decided that it needed to replace its accounting system. "One of our main requirements was more flexible and robust order management and inventory modules," says Kelsie Longbrake, Accounting Manager for Committee for Children. In addition, CfC was looking for a comprehensive solution that offered:

- Distribution capabilities to connect directly to shipping vendors.
- Inventory management that provides real-time inventory data so that CfC can better plan to meet demand.
- More standardization for order management, reporting, and other key financial processes.
- More accounting modules, including a cash manager and a purchasing system.
- Internal controls to manage who could access which areas to enter, change, or delete data.
- Better integration with its CRM system.

Solution

Committee for Children wanted to make sure that the solution it chose met both its current needs as well as offered the flexibility to adapt to future requirements. CfC worked with a consultant over several months to conduct an in-depth needs analysis and put together a request for proposal (RFP) that addressed those needs. The resulting RFP—consisting of 1,800 questions, including 300 essay questions—was sent out to software solution providers representing Microsoft Dynamics™ SL (formerly Microsoft Business Solutions–Solomon®), Sage MAS 200, and Sage Accpac.

Next, CfC invited all of the respondents to a meeting where they could ask questions directly of the CfC stakeholders and get acquainted with the organization. The Committee for Children then gave each solution provider organization a standard demo script it could use to showcase how its solution would address the tasks. The demos

were reviewed by a team of approximately 10 people that included at least one person from almost every CfC department.

"Between each demo, we had team meetings where we discussed the pros and cons of each solution and reviewed the scorecards completed by each team member," says Longbrake.

Following that process, the CfC team chose Synergy Business Solutions, a Microsoft Gold Certified Partner, to implement Microsoft Dynamics SL. "We were very impressed with Synergy for its responses to both the RFP and the demo request," says Longbrake. "We chose Microsoft Dynamics SL because we felt that it has more of the detailed features and functionality that we were looking for, especially workflow management." With the workflow management functionality in Microsoft Dynamics SL, administrators can set up and automate the steps in the order process according to the type of order placed. This helps boost order management throughput and helps improve customer service.

Building a Comprehensive Solution Prototype

Synergy began work immediately. A team consisting of a project manager and two senior consultants talked to CfC team members in detail about how they would use each Microsoft Dynamics SL module and then developed a proof of concept to show how the software would work in those real-life scenarios.

"Before a customer acquires the software, we do a proof of concept, where we configure every module they want to use exactly as they are going to use it," says Jered Cady, President of Synergy Business Solutions. "We documented that configuration for Committee for Children and spent one day going through it in detail with the CfC team to show them

what it would do. They agreed that it did what they wanted, so we went forward."

Designing the prototype took about three weeks. From that point, it took about five months for Synergy to add custom enhancements; refine the configuration; work with the SalesLogix CRM partner to create links to the Customer Maintenance, Training Registration, and Rental components of the CRM application; convert data from the old system to Microsoft Dynamics SL; and train CfC workers.

In the end, CfC implemented the following Microsoft Dynamics SL modules:

- Financials—General Ledger, Accounts Payable, Accounts Receivable, and Cash Management
- Distribution—Inventory, Purchasing, and Order Management
- Project management—Project Controller

The nonprofit also implemented:
- Microsoft FRx® financial reporting and analysis software
- Microsoft Forecaster budgeting software

Synergy also implemented two third-party applications—MaxQ Technologies Freight Manifesting, which provides integration with UPS, and ISIS Hard Close, which is an accounting controls module—and integrated them with Microsoft Dynamics SL.

Using the Train-the-Trainer Model

Each Microsoft Dynamics SL module required one day of training and Microsoft FRx required two days. CfC sent at least two people to each module training session, which was conducted by Synergy at its Seattle office. "The people who attended the training were typically a manager and the person who handled the duties covered by the module, such as accounts payable or receivables," says Longbrake. "These two people became the power users of that

module, and they trained additional people as backups."

In addition, there was a special one-day order management training session on the CfC site for a variety of people, including line supervisors, transaction processors, and customer service personnel. "The order management training was particularly crucial because it was very customized to our way of doing business," says Longbrake.

Starting a New Year with a New System

Because the new system was based on the Microsoft Windows Server® operating system, the implementation team was able to develop and test on a system that was completely separate from the existing Macintosh server. At the same time, Committee for Children deployed Microsoft Exchange Server communication and collaboration server, and Microsoft SQL Server™. Its workstation computers were already running the Windows XP Professional operating system and Microsoft Office Professional Edition.

When the testing was complete, CfC switched from the old system to the new one overnight at the start of the new fiscal year. "We came in that Saturday to import the data into the new system and did an inventory count that weekend as well so we could import that data cleanly," says Longbrake. "Then Monday morning we came in and started using the new system."

The only major customization was for order management. "We keep all of our client data in SalesLogix CRM," says Longbrake. "So rather than entering a new client into Microsoft Dynamics SL, we enter it into our CRM system, which fills that client data in in Microsoft Dynamics SL. If we want to update an address, we do it in the CRM system and it gets updated automatically in Microsoft Dynamics SL." Once an order has been

shipped and invoiced, a copy of that invoice is written back into the CRM system.

Benefits

By deploying Microsoft Dynamics SL, Committee for Children is able to fulfill its customers' orders more efficiently, establish more effective controls on its accounting system, make better-informed decisions, and increase productivity.

More Efficient Customer Service

Through more efficient inventory management and order management, CfC can provide a high level of customer service as it continues to grow. By maintaining the optimum inventory levels, it will be able to meet demand, while carrying only minimal inventory in products that have lower sales volumes. "The key factor in inventory management is to not have any more on the shelf than you want, but not have any less than you need," says Cady. "The capabilities in Microsoft Dynamics SL help CfC achieve that balance."

In addition, with the tight integration between Microsoft Dynamics SL and the SalesLogix CRM system, customer service staff can more efficiently answer customer questions and fulfill orders.

Better Control of Financial Data

As a nonprofit, CfC needs visibility into its financial processes to help ensure data integrity, security, and transparency. Using Microsoft Dynamics SL, the organization can set a variety of controls for employees to do their jobs, while still controlling access to areas that are not related to their tasks. This helps prevent accidental changes in the system and provides a clear audit trail of material events. The CfC accounting manager can also get a clear view at any time of budget overages or other situations that require immediate attention.

Improved Decision Making

Microsoft Dynamics SL offers a tightly integrated solution that meets the range of CfC business needs with financial, distribution, project management, and reporting modules. This provides decision makers with up-to-date information on every aspect of the business. "Now that we can quickly get an accurate report on which products sold from which product families, we can make better purchasing and development decisions," says Longbrake. "The real-time inventory capabilities provided by Microsoft Dynamics SL help us manage inventory more efficiently so we can maintain a lower inventory in certain areas and increase the level in others."

CfC uses the project accounting features in Microsoft Dynamics SL to more easily track and analyze all costs associated with each project and marketing campaign to determine the most efficient allocation of resources.

More Efficient Use of Time

One of the biggest benefits CfC expects to gain from implementing Microsoft Dynamics SL is increased productivity. All data—including sales, production, and shipping information—is entered only once and is then available throughout the system. The reporting capabilities of Microsoft Dynamics SL not only provide information that wasn't easily available before, but makes it available in seconds rather than requiring tedious manual calculations. "It's too early to say exactly how much time we'll save with Microsoft Dynamics SL, but we expect to spend significantly less time in data entry and processing so we can focus more on reporting and trends," says Longbrake.

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For more information about Synergy Business Solutions products and services, call (206) 859-6505 or visit the Web site at:
www.synergybusiness.com

For more information about Committee for Children products and services, call (206) 438-6416 or visit the Web site at:
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Microsoft Dynamics

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