CASE STUDY:
THE ARC OF DAUPHIN AND LEBANON COUNTIES

Nonprofit moves from grant program to Microsoft Dynamics® CRM, improving employee productivity and case management

The Arc of Dauphin and Lebanon Counties (The Arc) is a nonprofit, membership organization with a primary purpose of providing services and support, 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 grant software system to manage donations. In addition, the organization was using paper, an old FoxPro database, Microsoft Excel and Access to manage their member, donor and service data. Each service area used a different program to track information, none of which was shared across the entire organization. Due to excessive duplication, day-long meetings were required to sort lists.

Project

RSM implemented a Microsoft Dynamics CRM business solution 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. In phase two, the team created a system to track donations and programs. Additional functions outside the scope of the project were added, thanks to Microsoft Dynamics CRM’s ability to easily configure to the needs of The Arc.

“Overall, the new CRM system has allowed The Arc to work more productively 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 was patient in explaining the process and created solutions for our needs.”

Matt George,
The Arc of Dauphin and Lebanon Counties

“Overall, the new CRM system has allowed The Arc to work more productively 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 was patient in explaining the process and created solutions for our needs.”

Matt George,
The Arc of Dauphin and Lebanon Counties
For example, systems were developed to improve member relations by allowing The Arc to create Individual Education Plans (IEP) for members and schedule follow-ups with families to monitor the plans and assess how they were working. In the past, The Arc would only communicate with families regarding IEPs when problems arose. The new system configuration eases the process for members, families and districts.

The Arc has also experienced a shortened response time to grant applications, allowing the organization to respond to more applications and acquire additional program funds. Before Microsoft Dynamics CRM was implemented, The Arc could not gather the information needed to apply for grants in a short timeframe.

Outcomes

- Increased productivity through a centralized database
- Proactive case management to improve member, family and district relationships
- Enhanced visibility into program attendance, allowing for upsell of other programs
- Increased grant application approvals due to better access to required information to complete applications
- Improved services responses from reactive to proactive
- Enhanced customer service with the ability to track all consumer activity to caregiver
- Improved ability to work smarter and do more without staffing changes
- Reduced duplication of data entry from different program groups