



**POWEROBJECTS REPLACES ACT! WITH  
DYNAMICS CRM FOR CARINGBRIDGE**



**Industry:** Health and Life Sciences  
Technology

**Customer Profile:**

Located in Eagan, MN, CaringBridge provides custom Web sites to those experiencing a serious health event. The not-for-profit organization relies on partnerships to donate and sponsor patient Web sites.

**Situation:**

CaringBridge was dissatisfied with their 1999 version of ACT!. There was no visibility into accounts and the program didn't have space provided for key information.

**Solution:**

PowerObjects implemented a Microsoft Dynamics CRM system to help streamline processes and organize information.

*"It's not just storing the information but producing lists based on the information we enter. We are going to be doing another campaign and it seems like it's going to be a very smooth process. The integrity and validity of the information will all be there."*

Judy Trucano, Nonprofit Partnership Manager, CaringBridge

CaringBridge, a provider of Web sites that connect friends and family to loved ones experiencing a serious health event adopted Microsoft Dynamics CRM to effectively manage the company. The nonprofit organization needed to move from ACT! to better share information, track lead statuses and give greater visibility to activities for management. They now have deeper and more organized information and have been able to streamline their processes by using the CRM tool. CaringBridge is hoping Dynamics CRM will help them achieve their ultimate goal of establishing 6,000 hospital partnerships to spread the word about their life-enhancing tool for those experiencing a serious health event.

“We were just pecking our way through our 1999 version of ACT!, we didn’t even use it very often,” Sami said. “It was very hard to track lead status, activities and our effectiveness to make change. Our current system just wasn’t cutting it.”

Sami Pelton, Partnership Director,  
CaringBridge

### About CaringBridge

When Sona Mehring, founder and executive director of CaringBridge was given the responsibility of updating friends and family about a friend’s high-risk pregnancy in 1997, she realized the task was not easy. Her friend’s baby, Brigid, was delivered at 24 weeks and there was an urgent need for information among friends and family.

To make the process easier, Sona and friends created a Web site that updated everyone on the progress of mother and baby. The site had space for loved ones to leave supportive messages to help the mother push forward. Unfortunately, the baby lived nine days but the love and support from the Web site was a tremendous comfort for the family.

After recognizing the power of the Web site, St. Paul, MN, Children’s Hospital started a memorial fund created in Brigid’s memory. The fund granted a computer and Internet access to other families so they could have their own CaringBridge sites during a medical crisis. From that day forward, CaringBridge grew from word of mouth.

### A Move To Reach More Families

CaringBridge relies on hospital partnerships to inform patients and families experiencing a serious health

event about their free Web site services. Formal partnerships involve sponsoring CaringBridge financially and having their logo and company profile affiliated with specific CaringBridge Web sites created by their patients or members. These partnerships include various health care partners, professional organizations and nonprofit organizations. In 2005, a part-time person was hired to manage these partnerships for the nonprofit organization.

“Our first partnerships were formed when the hospitals would call us after a patient came to their hospital with a CaringBridge site,” said Sami Pelton, Partnership Director for CaringBridge.

As partnerships grew across the nation, six more people were hired to manage those relationships. In 2007, ten years after the first Web site was created, the word-of-mouth push for partnerships had started to subside and the company needed to establish a ‘sales’ effort to form these partnerships.

Out of 6,000 possible hospital partnership opportunities, CaringBridge has made 400 partners. Their ultimate goal is to partner with all 6,000.

“We had our one billionth visit to the Web site this past week, and although we are very proud of that number,

“They have been very motivated to get up and running and using it. The more they use it the more they start seeing why putting the data in the CRM is important.”

Sami Pelton, Partnership Director,  
CaringBridge

there are many more families out there that could be benefiting from a CaringBridge Web site that are not,” said Sami.

To better manage those relationships between multiple staff members, Sami knew they needed a new system. She needed something that was user-friendly and could centralize all their customer records. She also wanted her sales team to be able to track progress and share tasks to assure everyone has a complete view inside each partnership. More importantly, Sami needed a system that provided real-time reports.

#### Decision Factors

In 1999 CaringBridge was gifted licenses to ACT! but was never formally trained on the software.

“We were just pecking our way through our 1999 version of ACT!, we didn’t even use it very often,” Sami said. “It was very hard to track lead status, activities and our effectiveness to make change. Our current system just wasn’t cutting it.”

Sami set off to find a software solution that would make the grade. In the running was an upgraded version of ACT!, Microsoft Dynamics CRM and another platform currently used by CaringBridge for customer service help database. Since this tool was

already in-house, they considered buying the company’s CRM extension to minimize the employee learning curve.

“We didn’t like the CRM platform for our current help database solution. It was pretty different than we were used to and not as user friendly as it could have been, and the upgraded version of ACT! was still limited,” Sami said. “We really liked that Microsoft CRM integrated with Outlook.”

#### The End Result

The entire CaringBridge partnership staff had a say in what software solution was bought. Sami said the staff’s final decision was based on value and the integration Dynamics CRM had with Outlook. Since staff had the final say, it helped drive them to start learning the software and add value to their work.

“They have been very motivated to get up and running and using it,” Sami said. “We are still on a learning curve right now, but we are doing another marketing campaign this month so that will continue to fuel their excitement. The more they use it the more they will start seeing why putting the data in the CRM is important.”

Sami said one of the greatest benefits to her, is the organization of their client information. She knows where all

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John Bergh, National Sales Manager,  
CaringBridge

the information is and doesn't have to search on staff's personal drives to get the information she needs.

### **Employee Perspective**

National Sales Manager John Bergh sells opportunities to current health care partners to co-brand their own CaringBridge Web site. These co-branded sites give hospital partners more visibility on their patients' CaringBridge page. John used the 1999 version of ACT! before making the switch with the company to Microsoft Dynamics CRM. He admits he is still on a learning curve with the new system but can see the long term benefits.

“The system can provide a greater depth of information. It also allows greater transparency so we can have more information,” John said.

Another employee, Judy Trucano Nonprofit Partnership Manager, also transitioned from ACT! to Dynamics CRM. Judy said when staff members used ACT! everyone used the system in their own way and they had to drastically change the system to fit their needs.

Now that CaringBridge has switched to Dynamics CRM, everyone is entering data the same way. Not only does the system enable them to unify the information they enter, but it unifies where the information is put.

“It's not just storing the information but producing lists based on the information we enter,” Judy said. “We are going to be doing another campaign and it seems like it's going to be a very smooth process. The integrity and validity of the information will all be there.”

### **Looking Forward**

In the future the CaringBridge team is looking forward to adopting PowerDashboards and PowerView made exclusively by PowerObjects. PowerDashboards will allow the CaringBridge team to create graphs and charts inside of Dynamics CRM with the data entered in by staff members. PowerView will provide the staff with one viewing window for all the information related to an account or contact. This will eliminate many click-throughs and additional open windows.