

SOLUTION STORY

BACKGROUND

This customer is a Minnesota-based healthcare provider.

The customer uses CRM primarily to track grant application submissions and grant reports that are submitted from approved applicants after receiving the grant funds.

Applicants utilize PowerWebForm to submit their applications. This creates a record in the custom entity grant application, housing their detailed responses from the grant application web form. Workflows are used to send out an automated response to the applicant confirming receipt of their application.

Workflows are also used to manage the approval process for grant applications. Upon submission, a workflow sends out an email from the primary CRM user at the organization to a supervisor that contains dynamic fields from the grant application record. The supervisor then responds to the CRM user by either approving or denying the grant application. The CRM user can then check a box for supervisor approval or denial on the grant application record within CRM.

If the grant application is approved by the supervisor, a workflow sends emails to the customer's leader, committee, CEO, and the foundation leader. If all parties approve the application, the CRM user can select the funds to be allocated for the grant via the lookup to a Funds entity, and then they can click the grant approved box. Clicking this box triggers another workflow that sends an email to the applicant informing them that their application has been approved. Another workflow triggers a countdown calendar that sends out reminder emails for T-minus 45, 30, and 15 days to the approved applicant that they must complete a grant report (this is also a custom entity from which records are submitted via PowerWebForm). CRM then tracks that the applicant has filled out the report and what is contained in that report.

Once the grant recipient submits a grant report, the lifecycle of how the customer uses CRM is completed.

MINNESOTA

HEALTHCARE PROVIDER

MANAGES GRANT

APPLICATIONS WITH

CRM'S CUSTOMIZABLE

WORKFLOW

FUNCTIONALITY

AWARDS + RECOGNITION

2012 + 2013 + 2015

Microsoft Dynamics Partner of the Year

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2011 + 2013 + 2014

Inner Circle for Microsoft Dynamics

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2009 + 2010 + 2011 + 2012

Inner Circle for Microsoft Dynamics

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Convergence Customer Excellence Awards

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GOLD + SILVER

Inner Circle for Microsoft Dynamics

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