



Iowa Goodwill Establishes Powerful Client-Tracking System with CRM Technology

Overview

Country or Region: United States
Industry: Charities and philanthropic services

Customer Profile

Goodwill Industries of Central Iowa provides job training to people with disabilities and other barriers to employment.

Business Situation

Goodwill Industries of Central Iowa relied on multiple spreadsheets and systems to manage processes for hiring and tracking clients, resulting in manual processes and lack of real-time insight.

Solution

The company deployed Microsoft Dynamics CRM, taking advantage of the solution's xRM application development framework to establish a powerful client-tracking and employee-tracking system.

Benefits

- Increased caseload capacity by 20 percent, placements by more than 38 percent
- Improved donor relations
- Enhanced job-training services

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Jill Olson, Executive Vice President, Goodwill Industries of Central Iowa

Goodwill Industries of Central Iowa's mission is to empower individuals and families with barriers to independence through training, education, and employment. Relying on manual, paper-based processes and spreadsheets to track and manage its clients, Goodwill decided to improve productivity and the quality of its services through a customer relationship management solution. Goodwill deployed Microsoft Dynamics CRM and customized the solution to the unique requirements of case management for job-training services. Since deployment, Goodwill has increased caseload capacity by 20 percent and job placements by more than 38 percent without adding staff. With all information now centrally managed, the organization provides quick responses to its clients, strengthening such relationships, and is poised to continue to increase the quality of its training services.



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Situation

[Goodwill Industries of Central Iowa](#) is one of 207 regional Goodwill organizations throughout North America and across the world. The organization is a 501(c)(3) not-for-profit and has been serving Central Iowa communities since 1955. Currently, Goodwill Industries of Central Iowa serves 22 counties and includes 17 Goodwill retail stores throughout the Central Iowa area. Through its job-training programs, the organization's goal is to help people with disabilities and other barriers to employment gain independence and become more fully contributing members of society.

With job training central to its cause, Goodwill must expertly manage and track its clients from initial intake and qualification to training and placement in positions at companies. To do so, Goodwill employees have traditionally relied on manual, paper-based processes and countless spreadsheets.

“The processes for qualifying, hiring, and tracking all the information and activities of our clients were manual,” recalls Andrea Jansen, Employment Services Coordinator for Goodwill Industries of Central Iowa. For example, after qualifying a client, Jansen would have to fill out pages of documentation. Then, she would give that documentation to a counselor to begin the process of training that client based on a series of determined goals, such as the need to build problem-solving skills. With information recorded manually, finding information, gaining insight into clients and the organization as a whole, and reporting on funding to donors proved difficult.

Jansen goes on to note that “Overall, we wanted to become more efficient and greener, eliminating much of our paperwork. And when we talked with grantors, we knew we would be looked upon more favorably if we had a client

management system in place. And it would make it easy for accreditation agencies to review us.”

Solution

In looking for a system for managing and tracking its clients, Goodwill Industries of Central Iowa called on the expertise of its longtime Microsoft technology partner and deployed [Microsoft Dynamics CRM](#). Says Jansen, “Because of the customizability of Microsoft Dynamics CRM, we were able to literally furnish our technology provider with paper copies of all the forms we relied on, and they were able to make such functionality available in the solution. As a result, even though the solution was new, our staff immediately recognized what they were doing.” By taking advantage of the [xRM application development framework of Microsoft Dynamics CRM](#), the technology provider was able to deploy and customize the solution in only 60 days. Currently, 30 employees—including services managers, job coaches, and employment specialists—use the solution.

Client Intake

Now, when a prospective client approaches Goodwill Industries of Central Iowa for job-training help, an intake counselor initiates a client-intake process in Microsoft Dynamics CRM. To begin this process, he or she fills out an electronic form that includes client information and goals. Says Jansen, “Goal setting is a team process that involves the client, a case manager, a guardian, and a counselor here at Goodwill. Many of the goals that we track are centered on employment. For example, if someone lacks adequate problem-solving skills or has issues with attendance or punctuality, we would enter those goals in Microsoft Dynamics CRM and track the data over time.”

Client Management and Tracking

After the initial intake process, an intake counselor routes the form through an

Microsoft Dynamics CRM supports the client-intake process.

automated workflow to coordinators and managers, such as Shelly Hansen, the organization's Vocational and Family Services Manager, to determine the eligibility of the prospect. "After I review the prospective client's file and determine that he or she meets the requirements for our services, I move the prospect's file to one of our counselors through Microsoft Dynamics CRM," says Hansen. "The counselor can then become familiarized with the case, complete any required paperwork, and set up an orientation session to begin our training services."

By using the solution, the counselor can track client funding and remaining time on the funding for a particular client and run related reports for state and federal purposes. "Each of our funding sources requires a variety of paperwork, tracking, and different documentation standards," says Hansen. "With Microsoft Dynamics CRM, we keep track of all of that."

By taking advantage of the Microsoft

Outlook client for Microsoft Dynamics CRM, counselors receive alerts via email and on their calendars to help ensure that they follow up with clients regularly and check on the progress of clients working toward their goals. In addition, if a funding source is running low, Microsoft Dynamics CRM sends an automated alert to accounting staff.

Client Off-Boarding

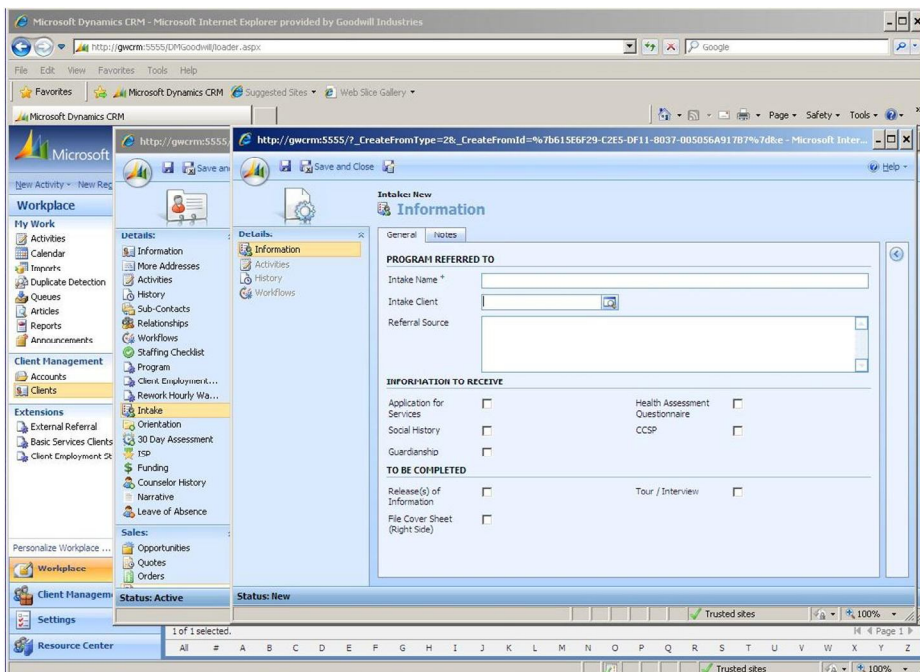
With the ultimate goal of placing its clients in jobs outside of Goodwill, Goodwill Industries of Central Iowa also uses Microsoft Dynamics CRM to manage client off-boarding. The off-boarding process begins with a checkout procedure that initiates a series of workflows to notify counselors. Such a move by clients is then deemed a leave-of-absence procedure, enabling those clients to come back if they need additional Goodwill training and services. During the leave of absence, Goodwill staff can use the solution to track 30-day, 60-day, and 90-day absence periods, after which a workflow task asks for a final sign-off from a director or manager who then moves the employee to inactive status.

Client and Business Analysis

With all client information in a single system, Goodwill Industries of Central Iowa is now beginning to empirically track and analyze its organization, clients, and services. Now, the organization has insight into activities, such as:

- How long it takes to move a client from application to active status.
- Caseload per counselor.
- Number of activities per client.

Says Jansen, "Because we're a nonprofit and the money is not ours, so to speak, it is all the more important that we are able to report on all aspects of our business. With Microsoft Dynamics CRM, it's only a few clicks and queries to let someone like a grantor know what we're doing with their



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money, how we are empowering individuals, and how we are making a difference.”

Benefits

With Microsoft Dynamics CRM, Goodwill Industries of Central Iowa has moved from manual to electronic client management. Says Jill Olson, Executive Vice President of Goodwill Industries of Central Iowa, “With Microsoft Dynamics CRM, we are providing a tool that lets our staff do their jobs more efficiently, enabling us to serve more clients without adding staff. At the same time, we can be more accountable and transparent to our funders and customers.”

Increased Caseload Capacity by 20 Percent, Placements by More Than 38 Percent

By replacing many of its manual processes with Microsoft Dynamics CRM, Goodwill counselors have gained the ability to serve more clients. Says Jansen, “By streamlining case management with Microsoft Dynamics CRM, and without adding staff, we have increased our caseload capacity by 20 percent—from 25 clients per counselor to 30 clients per counselor.”

Jansen adds that the true success of the organization, however, comes in successful job placements after training. Already, the organization is on track to exceed the previous year’s placements by more than 38 percent. Jansen says, “The year prior to our implementation of Microsoft Dynamics CRM, we placed 122 clients in jobs. This year, we have 38 percent more placements.”

Improved Donor Relations

With all client and funding information in one system, Goodwill Industries of Central Iowa can now provide more timely and meaningful reporting to its donors. Says Jansen, “Grants require specific reporting functions. With Microsoft Dynamics CRM, we can quickly identify and search for

specific individuals and their grants. Previously, we performed this task by using more than 50 spreadsheets with different people tracking them, which created a lot of error.”

Jansen goes on to note, “When we approach organizations for grants now, we can reference information from Microsoft Dynamics CRM to let those organizations know what kind of funding we need to meet specific placement goals, helping them understand in a tangible way what kind of results we can achieve.”

Enhanced Job-Training Services

Moving to a single system has helped standardize and reinforce best operational practices, ultimately leading to improved job-training services. Explains Jansen, “With consistent processes enforced by Microsoft Dynamics CRM, we have witnessed a great increase in quality assurance; all clients get the same training and service when they come through our program.”

In addition, with all information now in one system, Goodwill is poised to continue to increase the quality of its training services by identifying and acting on trends in its client base.

Says Jansen, “Counselors can see the correlation between behaviors, goals, and results, and they can use a successful approach again with the same or different client. We can also look at our client base as a whole and if a certain percentage of clients express a similar need, we can implement a broader training program for all of them.”