

Case Study

CRM Support Services Help a Nonprofit School to Reduce Issues by 60% and Improve Efficiency by 90%



Customer Overview

Customer

A non-profit outdoor education school

Profile

The school is dedicated to teaching environmental ethics, technical outdoor skills, wilderness medicine, risk management, and judgment across six continents

Industry

Nonprofit

Services

CRM Support

Business Need

The school was using a Dynamics CRM platform to manage day-to-day processes, right from when a student enrolls for a course on the website to when he/she completes it. However, the existing support partner was incapable of optimizing user experience, resolving issues, and enabling seamless integration.

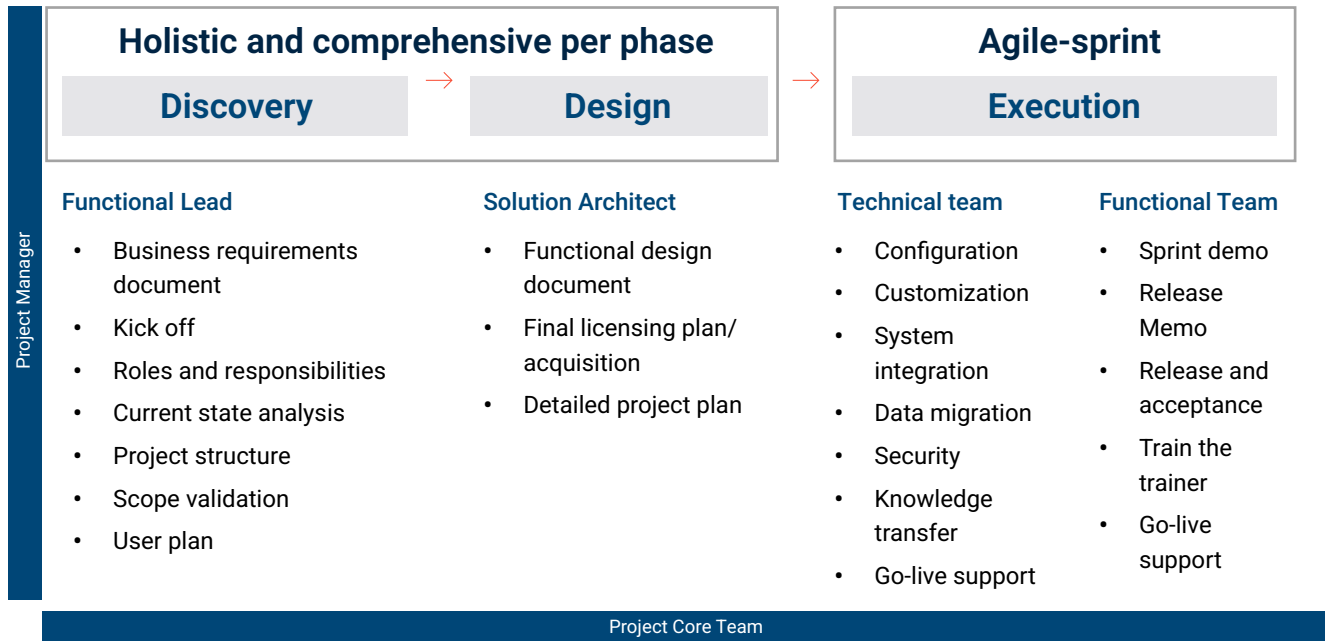
- Frequent support issues impacted user experience, making it difficult for students to enroll and manage courses.
- Poor integration with other systems in the ecosystem led to failed Application Programming Interface (API) calls due to the sheer number of calls made to the Oracle database.
- Since in-bound and out-bound integrations were configured using plug-ins, they only had an accuracy of 50-60% because of time-out issues.
- Changing project partners led to several configuration issues while migrating data from a 3rd-party app to CRM.
- Updating existing data per the new requirements without hampering the existing functionality was difficult.

Once the support issues were streamlined and the existing environment was stabilized, the client also wanted to carry out several enhancements to the existing solution deployed by the previous IT partner.

Approach and Solution

Synoptek has been providing Dynamics CRM Support Services to the client for over two years. While the engagement was initially limited to resolving support issues, it was further expanded to include enhancements and integrations with various domain-specific solutions.

We adopted an on-shore/off-shore development model, where our on-shore team connects with the client to gather requirements, and the off-shore team performs the tasks of development and testing. We used Agile scrum methodology for new project implementations.



As part of the engagement, we enabled several integrations, enhancements, customizations, and data migrations:

Integrations

- Updated integrations using Azure Functions and Azure Logic Apps with a retry mechanism.
- Created integrations to their expense management system and payment processing platform which facilitates standard activities.
- Synced course attendance data from a third-party website to the portal website, allowing faculties to finalize and lock in grades and issue certificates.

Enhancements

- Redesigned portal website setups, embedded Canvas app integrations to CRM, and projected the same on the portal website page.
- Reviewed and resolved tickets logged in the ticketing system and deployed changes to the production environment on a predetermined date every month.
- Maintained a Quality Control Report for all releases and provided release memos to the client post the monthly deployment.

- Enabled email updates to faculties and sponsors working on courses and updated information on faculty contracts, travel details, and course attendance.
- Managed separate portal websites for students, faculties, and sponsors to view enrolled course details and submit evaluations integrated with CRM.
- Enabled functionality where emails on course completion can be sent from CRM with a click of a button.

Customizations

- Customized the CRM interface for better user-friendliness and upgraded the current environment to better cater to user needs.
- Developed a custom retrieve mechanism that calls the same API endpoint within a defined time interval to ensure that the system is running without any failures.
- Developed multiple Power Automate Flows, Logic Apps, and Azure Functions to trigger timely emails from a third-party app to students on successful enrolment, fee payment status, and upcoming course reminders.

Data Migration

- Developed and performed multiple data migration activities for the client using SQL Server Integration Services (SSIS) and KingswaySoft.
- Performed an address migration and shifted them from a custom address entity to the CRM out-of-the-box address.
- Implemented a phone number migration by replacing current data integrated from Oracle to the Microsoft Dataverse with the CRM Contact entity. This provided the customer with a more straightforward phone number entry process.



Business Benefits

The nonprofit school relies heavily on the CRM system to conduct day-to-day operations. With our prompt support and assistance, the nonprofit could:

- Reduce manual work for end users, thus improving their overall experience.
- Improve the efficiency of the system by 90% through continuous updates and optimization.
- Reduce support issues by 60% due to the implementation of the retrieve mechanism and ensure the CRM system is running without any failures.
- Improve accuracy of integrations by 90-95% using Azure Functions and Azure Logic Apps with a retry mechanism.

Testimonial



We are very happy with the process enhancements made by Synoptek. The delivery and quality improvements are apparent, a positive and direct reflection of the efforts by the team.

– IT Applications and Data Manager

About Synoptek

Synoptek delivers accelerated business results through advisory-led, transformative full-life-cycle systems integration and managed services. We partner with organizations worldwide to help them navigate the ever-changing business and technology landscape, build solid foundations for their business, and achieve their business goals.