



— Case Study

Implementing a modern charity CRM system with Dynamics 365 and Evo 365

Dorothy House



Dorothy House



Dorothy House Hospice Care provides free end of life care to a population of over 593,000 people in Bath & North East Somerset, and parts of Somerset and Wiltshire. The Hospice provides medical services, family support, bereavement services and hospice at home care for people who are approaching death. More than 90% of the care Dorothy House provides is out in people's homes and community settings, with the remaining at the Winsley site. The Hospice is partly funded by the NHS, but predominantly by donations, income from 27 shops, and fundraising efforts.

Dorothy House has a dedicated team of fundraisers who work hard to raise awareness and vital funds for the charity, which rely on bespoke fundraising technology.



Challenges

- ◆ Legacy CRM system that was outdated, inflexible, and unreliable
- ◆ On-premises infrastructure approaching end-of-life
- ◆ Tight timeline to migrate to a new CRM system
- ◆ Manual processes and limited integration and automation possibilities
- ◆ Difficulty tracking and reporting on fundraising performance and impact

Solutions

- ◆ CRM system built on Dynamics 365 with EVO 365 accelerator
- ◆ Migration of files from legacy servers system to SharePoint Online
- ◆ Integrations with Microsoft 365, event management solution and payment providers
- ◆ Modules to help with fundraising, trusts and grants, legacies and more

Outcomes

- ◆ Modern and flexible charity CRM solution based on Dynamics 365
- ◆ Reduced technical debt
- ◆ Improved data quality, visibility and reporting
- ◆ Enhanced integration and automation replacing manual processes
- ◆ Greater flexibility and extensibility

Background



The fundraising team at Dorothy House does vital work to ensure that they can keep supporting patients and their families for many years to come. This includes various events and campaigns, such as the touching Firefly Appeal, which allows people to add a light amongst the trees in the woods at the Hospice's grounds, representing the life of a loved one.

However, to reach supporters and fundraise effectively, the team at Dorothy House require modern technology that can support their activities and unique processes.

As a result, Dorothy House wanted to replace their old CRM system, which was hosted on-premises with server infrastructure nearing its expiry date. The system was also outdated and limited in its functionality and integration possibilities.

With a tight deadline of only a few months to switch systems, Dorothy House needed an agile partner that could meet their timescales.



“Our overall project timeline and expectations were ambitious, we knew we needed a project partner that shared our vision and enthusiasm. Chorus was instrumental in delivering our solution, not only delivering on those goals, but helping us through the cultural transition from a legacy system to a future solution.”

Don Kennedy, Head of Fundraising, Dorothy House



Dynamics and Evo 365



Dorothy House wanted a more modern system that could be integrated with other areas and enable them to manage their fundraising activities, donor relationships, and communications more effectively. As they were increasingly using Microsoft 365's features more extensively, they also wanted to connect their CRM system with SharePoint, Teams, and Outlook.

Dorothy House chose to partner with Chorus, knowing they were a Microsoft Partner with a long history of working with charities and the non-profit sector on Dynamics 365 CRM projects. They selected Dynamics 365 because of its flexibility and power, while knowing that Evo 365, the charity accelerator for Dynamics 365 created by Chorus, could offer them a lot of the functionality they required in Dynamics, right away.

Discovery

The project started with a discovery phase, where Dorothy House clearly defined their needs. Both parties agreed to adopt a "Minimum Viable Product" (MVP) approach to deliver the essential functionality required to support operations, in the fastest way possible, given the tight timeframes.

Chorus suggested an agile approach with a regular two-week sprint cycle, where there would be development, user testing, fixes, and changes. This agile approach enabled Dorothy House to use and test the software quickly, give feedback at each stage, and make agile improvements along the way.

"We suggested an agile project approach, so we could deliver a solution that matched Dorothy House's needs in a very short timeframe. We collaborated closely together to understand the requirements, develop the system, and incorporate feedback at each stage. This helped us ensure the system was user-friendly and effective, while delivering exactly what Dorothy House needed."

Patrik Sausen, Functional Consultant at Chorus



MVP and migration

Chorus built a new Dynamics 365 environment and used Evo 365 to meet many of the requirements. Evo 365 provides charities with fast access to a lot of functionality in Dynamics 365, such as memberships and fundraising functionality. This gives charities detailed capabilities to manage, process and report on payments, as well as simplifying things like GiftAid. With the system in place, Chorus then added additional processes to meet MVP requirements before starting the migration.

Thanks to this approach, Chorus were able to move Dorothy House to their new system within three months, achieving the project's tight deadline.



Post-MVP modernisation

The MVP provided the foundation for further modernisation and automation of various areas of the system, enabling Chorus and Dorothy House to work together to iteratively add new functionality over time.

For example, Dorothy House required functionality to manage and view legacies in Dynamics 365, so they worked with Chorus to build a custom legacies feature into the system, enabling Dorothy House to replace the use of spreadsheets.

Integrations were also required with other services, such as Committed Giving for donations and Enthuse for event tracking. Chorus created these integrations, enabling them to access and manage all the events, payments and contacts in Dynamics 365, using the Evo 365 framework.

To add further value for their users, Chorus integrated the system with Microsoft 365 apps. This included Outlook and Teams integrations so that employees can use emails and calls with Dynamics 365, including Teams dialling.

Chorus also performed a large migration of data from the old system, which used an on-premises database and SQL table, into SharePoint Online, where it is linked to the contact records in Dynamics. Now Dorothy House can use both Dynamics and SharePoint to manage their data, and benefit from the security and data protection & governance features of Microsoft 365.

“Right from the start, we knew we had ambitious timescales to deliver a lot of functionality in our new CRM. At every step of the way, Chorus kept us on task. As a result, we were able to deliver our new CRM as early as possible, and have continued to add more and more capability in incremental deliveries since then. We wouldn’t have been able to do this without Chorus.”

James Finbow, Digital Transformation Project Manager at Dorothy House

Dynamics and Evo 365

Dorothy House has an incredibly important mission, providing exceptional personalised care and support to people with life-limiting illnesses and their loved ones.

The new CRM system will help Dorothy House raise more vital funds, enabling the charity to continue engaging with their supporters, deliver more effective campaigns, and offer a more personalised and rewarding experience to their supporters.

The project has been a real success story, demonstrating what’s possible through a truly collaborative approach. The system has removed Dorothy House’s technical debt and delivered a modern CRM system that is flexible and able to evolve in the future, with Chorus providing support whenever needed.





Talk to us

Sales & General
hello@chorus.co.uk

Accounts
accounts@chorus.co.uk

Telephone
01275 398 900

Website
chorus.co.uk

Address
1 Serbert Way, Bristol, BS20 7GD

