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OTT, INC. CASE STUDY



World Relief Spokane
Doubles Fundraising in 2 Years
and Centralizes Operations with
Custom Non-Profit Dynamics 365
Solution by OTT, Inc.

www.ott-inc.com

Industry: Non-Profit

World Relief Spokane opened its doors in 1990 as one of 20 U.S. offices of the international World Relief organization. The faith-based non-profit relies on government grants, community donations, partnerships with local churches and hundreds of volunteers to provide a wide variety of refugee resettlement services to the community including housing, education, employment, legal services and much more.

Their mission is to ensure refugees get the support and guidance they need to start a new life and thrive in Spokane.

www.worldreliefspokane.org

BENEFITS DELIVERED

- ✓ ALL-IN-ONE CENTRALIZED SOLUTION
- ✓ EXPANDED PROGRAMS FOR REFUGEES
- ✓ STREAMLINED CASE MANAGEMENT
- ✓ ELIMINATED PAPER FORMS
- ✓ DOUBLE FUNDRAISING IN 2 YEARS
- ✓ IMPROVED COLLABORATION

World Relief Spokane Doubles Fundraising in 2 Years and Centralizes Operations with Custom Non-Profit Dynamics 365 Solution by OTT, Inc.

Managing hundreds of refugees and volunteers at a time, across multiple departments and services, was a manual and time-consuming process for World Relief Spokane. Add several levels of reporting requirements, long-term case management and an urgent need for fundraising due to drastic government cuts, the organization needed a solution to centralize and streamline its processes from end to end.

"We were heavily dependent on Excel, Access and paper-based processes which was very inefficient," says Dr. Mark Finney, Director of World Relief Spokane. "We needed to do a better job of recording data so we don't lose contact with people through turnover. Through 30 years in Spokane, we had a relatively small number of contacts because of it."

World Relief Spokane looked at other software systems but found them to be geared more for specific pieces of their needs and had no versatility to engage volunteer programs or manage resettlement work.

A local I.T. partner recommended OTT, Inc. as a Microsoft Dynamics partner with deep non-profit experience. Initial meetings to gather the needs, goals and data points of World Relief Spokane led to a personalized demonstration of Microsoft Dynamics Customer Engagement tailored with non-profit functionality. It impressed the leaders of World Relief Spokane and the decision was made to move forward.

“

Customizing software like this for our industry is no small task. There are many variables such as government grants, cultures and languages and OTT, Inc. found a way to make it happen at an affordable, sustainable price which is impressive.

DR. MARK FINNEY
DIRECTOR



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ALL-IN-ONE, CENTRALIZED SOLUTION

Dynamics 365 in the cloud has enabled World Relief Spokane to move offline documents, contacts and Access databases from multiple sources into an integrated solution with 24x7x365 access from any location and device.

EXPANDED PROGRAMS FOR REFUGEES

With new insights and a comprehensive picture of client needs, World Relief Spokane can expand services despite funding cuts.

“We’ve identified gaps in programs, tracked which refugees participated in which programs and were able to develop new locally funded programs to expand our services,” says Dr. Finney. “We’re not here to serve programs; we’re here to serve people and Dynamics has helped us do that more effectively.”

With Program Templates, users can dynamically tailor their programs as they grow and change. Refugees can be documented and maintained throughout the program process and each step can be configured to automatically generate based on the template.

OTT, Inc.’s consultants spent several hours within each of World Relief Spokane’s main departments to learn the processes, data points, requests and challenges of each person to build the most valuable Dynamics 365 solution.

The custom Microsoft Dynamics 365 Customer Engagement solution included several non-profit elements, including:

- | | |
|------------------------------------|------------------------|
| ✓ Government Case | ✓ Employment |
| ✓ Constituent | ✓ Ledger |
| ✓ Organization /Foundation /School | ✓ Fund Request |
| ✓ Donation | ✓ Medical |
| ✓ Volunteer | ✓ Household Management |
| | ✓ Program |



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STREAMLINED CASE MANAGEMENT WITH NO PAPER FORMS

Before their custom Dynamics 365 Customer Engagement solution, each case took a team of volunteers filling out paper forms, walking to another department to enter information into a spreadsheet then weeks later filling out another sheet and so on. Now, volunteers or case managers can enter information once and share it with the right department in the click of a button. Resettlement teams can track cases from start to finish and help clients be successful for the long term.

Financial assistance also required paper requests to the bookkeeper which was kept in a big binder and now it is all managed within Dynamics. "It's fantastic," says Dr. Finney. "We can track exactly how much money is spent and what it was spent on in one spot."

DOUBLE FUNDRAISING IN 2 YEARS

With drastic cuts to government funding, World Relief Spokane has had to actively seek community donations. Dynamics has enabled them to track and record relationships with donors with consolidated information that has helped them double fundraising in a short time.

IMPROVED COLLABORATION

With so many moving parts and people within World Relief Spokane, and manual paper processes, there was a disconnect. Now, everyone can work together to serve refugees more efficiently and actively.

Contact OTT, Inc. to learn more about Microsoft Dynamics 365 solutions for your business:

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