

Case Study

“Green Beacon Solutions Helps Clean Energy Organization Automate Grant and Investment Management with Microsoft Dynamics® CRM”



Green Beacon’s Customized Microsoft Dynamics CRM Solution Streamlines Approval Process, Improves Reporting and Documentation for Client

One of the premier clean energy organizations in the Northeast needed a better, faster and more streamlined way to process, deliver, monitor and report on its operations.

The organization has many diverse and complex divisions with different product lines and goals. Documenting and reporting at the division level and as an organization was a key requirement of the solution. The organization also needed a solution that would map and automate its complex process workflow. This would allow for standardization of procedures and enable the organization to manage a high number of transactions without adding a significant number of resources.

The organization reviewed a number of solutions and liked Microsoft Dynamics CRM for its flexibility, cost effectiveness and versatility. Green Beacon Solutions was chosen to do the customization and integration “because of their professionalism, dedication and their ability to fully understand and articulate the unique challenges of our organization,” said the project leader.

In Need of Better Process Management, Tracking and Reporting

The organization was a new entity and it needed a solution that would manage its core business process from within a single framework. The solution needed to manage and automate their entire process for documenting, reporting and making payments.

“We needed a solution that would ensure the entire process was tracked and managed from a single system – that included everything from managing the thousands of transactions, obtaining upper management sign-off, monitoring progress, and finally, paying out on successfully completed projects. This process involves multiple departments across the organization,” said the project lead.

Testimonial

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At A Glance

- **Automated Workflow Management** – The organization's entire business management process is now managed in Microsoft CRM
- **Enhanced Reporting** – The organization is able to quickly report on results to upper management and stakeholders.
- **A Custom Solution** – Microsoft CRM based solution includes more than 30 customizations.

Testimonial

"Green Beacon Solutions was willing to be flexible and very customer oriented. We challenged them with changes to the scope and modifications to the workflow, and they met our needs each time with an innovative solution," said the CFO. "They were committed to working with us, and acting as an advisor, and that really showed throughout the project implementation, and it shows in the final result."

A Custom Microsoft Dynamics CRM Solution from Green Beacon

Green Beacon went in depth in planning and design sessions to ensure the organization's unique needs were understood and addressed. It became apparent that the organization required a truly custom solution. The solution Green Beacon ultimately delivered included more than 30 customizations.

"Green Beacon is very good at absorbing the business and introducing new ideas to solve the different business requirements we face," said the project leader. "Because they truly understood our business they were able to deliver a workflow that really met our requirements. It was just crucial to the project being a success, and to our success moving forward."

Ultimately, the solution that Green Beacon created included the following:

- **In-Depth Workflow for Process Management** - As stated above, the organization needed a better, faster and more streamlined way to process, deliver, monitor and report on its operations. The organization is now able to track and manage that complex review process from a single system, making it much easier to manage. "Without this workflow automation we would need to hire many more people to do the same amount of work," said the project leader.
- **Custom Reporting Capabilities and Documentation** - Due to its complexity the organization needed the system to effectively capture and document its workflow and the results of operations. The workflow solution records and documents all interactions in the process for both internal and external auditors.
- **Accounting Integration** - The Microsoft CRM solution is integrated with Great Plains, the software used within the accounting department. As a result successfully completed projects are seamlessly directed to accounting in order to pay vendors.
- **Web Site Integration** - The organization needed the system to integrate with the organization's web site in order to posts results, press releases and new products. Microsoft CRM is integrated in such a manner that data from the system is automatically and accurately uploaded to the web site without much effort.

A Custom Solution from a Customer-Focused Advisor

The success of the implementation can be measured in the organization's ease of reporting, ability to handle large numbers of transactions with a small team, and the important strides the state has made in clean energy. But the client also points out that the implementation may not have gone so smoothly without the dedication and flexibility of Green Beacon.

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About Green Beacon Solutions

Green Beacon Solutions provides integrated financial, supply chain, sales automation, and marketing business solutions built on proven Microsoft technologies. These business solutions include expert software, as well as strategic consulting and managed services that deliver proven business and technology solutions to mid-market and mid-enterprise customers in the banking, distribution, manufacturing and professional services industries. With a proven track record helping clients quickly and cost-effectively meet emerging opportunities since 2001, this has resulted in the successful delivery of hundreds of projects with measurable financial returns.