

Company Net is a leading business consultancy and software development house with nearly 15 years of dedicated experience in helping organisations improve business performance and successfully manage change through the intelligent application of technology. Dedicated to building upon the Microsoft platform to help businesses throughout the UK achieve financial growth, we enable our customers to increase revenue, reduce costs, and improve customer service to gain competitive advantage.

Case Study

ProjectScotland was established by Scotland's first minister in 2005 as a national charity which helps young people realise their potential through volunteering.

ProjectScotland's Requirements

Initially, ProjectScotland's operations were highly labour-intensive. The workforce was loosely divided into four inter-related teams that depended on each other to carry out tasks. However, collaboration was limited to paper-based and manual processes, such as post-it notes and passing files from desk to desk. Processes weren't streamlined or formally linked, and there was no visibility across the organisation. It was also time-consuming to match volunteers to placements. Trying to handle the growing number of applications led to very high labour costs.

Our Solution

We began with a period of consultancy where one of our solution architects spent time with ProjectScotland staff to thoroughly understand the stakeholders' needs. This led to a proposal centred on people, process, technology, and the interaction between them.

Based on the integration of Microsoft Dynamics® CRM 3.0 and Microsoft Office SharePoint® Server 2007, the new system focuses on end-to-end life cycles. Each member of every team is accounted for in the lifecycle through a series of automatically triggered activities and reminders. This gives a seamless interaction between the volunteers and the available placements. Our solution covers every step from the public facing website and intranet portal to the CRM database that contains all of ProjectScotland's opportunity and volunteer data. Currently, the solution manages hundreds of volunteers and placements in different locations. It also helps prospective volunteers to apply for placements online. Formerly, ProjectScotland staff had to speak to each volunteer and then go through the placement database to find suitable openings for them. Now, applications are automatically pulled into the CRM system and are matched overnight to the placements against set criteria. Each morning, placement coordinators get automatic e-mail messages of potential matches and they can conduct interviews to initiate the process. ProjectScotland can create new placements or training opportunities which are published on the website by the CRM system so volunteers can access them online.

One key aspect of the new solution is using Microsoft Office SharePoint Server's CMS capability to allow ProjectScotland staff to update and change content real-time to accommodate frequent changes including recruitment campaigns and marketing materials. As both the public and internal face of ProjectScotland, scalability, flexibility, security and resilience are critically important. That's why we chose MOSS 2007 as the CMS platform. The flexibility of the SharePoint website allows for changing features (i.e. document libraries, blogs, wikis, and knowledge bases) with the same simplicity as the actual visual content. The scalability of SharePoint sites allows ProjectScotland staff to add new areas or content to the site for different user groups which can be secured and controlled by Active Directory services and/or forms based authentication.

Company Net is a leading business consultancy and software development house with nearly 15 years of dedicated experience in helping organisations improve business performance and successfully manage change through the intelligent application of technology. Dedicated to building upon the Microsoft platform to help businesses throughout the UK achieve financial growth, we enable our customers to increase revenue, reduce costs, and improve customer service to gain competitive advantage.

ProjectScotland management staff needed comprehensive business intelligence about all of the volunteer recruitment and mentoring activities, including marketing campaigns, workshop statistics and opportunity/placement information. By using the reporting features in Microsoft Dynamics CRM, we were able to produce in-depth data, which allows ProjectScotland to make better decisions.

The overall result is that Project Scotland has significantly increased output per head without increasing its carbon footprint.

Business Benefits

- Increased volunteer placement by 45%, with no need to expand the workforce.
- Reduced recruitment costs from £450 to £150 per volunteer.
- Greater flexibility, accuracy, and immediacy, saving several hundred manual work hours a year.
- Increased productivity through automated processes.
- Improved communication with volunteers resulting in a saving of 60 manual work hours per year and increased customer service levels.
- Tangible savings of up to £25k/month by taking the content management of their website in-house.

Achievements

- Successfully implemented SharePoint as external facing content managed website to AA-level accessibility compliance.
- Developed multiple portals for different company operations/user groups.
- Full integration with Microsoft Dynamics CRM 3.0 system.
- Extensive performance & optimisation to provide best possible experience for users with restricted bandwidth.

Bespoke Customisation

- Online application form for volunteers; InfoPath form served in public facing SharePoint site. Updates MS CRM system.
- Opportunity Search; Uses geo-coding provided by Postcode Anywhere and distance algorithm to match opportunities within a given radius.
- Mentor Portal; Self managed CRM data for Mentors. Integrates with MS CRM system.
- SwarePoint; Custom SharePoint Web part to enhance Alert Lists and Filter Lists; prevents posts being published until authorised by ProjectScotland moderators and replaces words found in the profanity dictionary with a configurable substitute.
- Partner Claims Portal; All Partner expenses can be self-managed using a SharePoint portal. Integrates with MS CRM and BACS finance processing system.
- Security; Implements forms based authentication for external uses and Active Directory for internal users.