Altus Dynamics CRM

The power of Dynamics CRM stems from a singular database where information starts accumulating during the first contact with a company, individual or constituent. Each time someone interacts, the organization learns something new. Capturing and tracking these insights in Dynamics CRM allows you to meaningfully engage and strengthen your relationships. Liberate your organization from disparate systems or physical files spread across departments or locations that do not interact with one another; Dynamics CRM enables you to communicate successfully and share meaningful information that leads to better constituent relationships.

Altus Dynamics CRM, based on Microsoft Dynamics CRM extends well beyond the traditional scope of a Customer Relationship Management solution by providing organizations with a tool that has the flexibility to match specific needs of a non-profit or Public Sector organization.

Maximise Your Relationships

Depending on your view point or position in an organization, CRM can be perceived in 3 ways; 1. **CRM as a System** – a database with related process, 2.**CRM as a Service** – a tool to provide better constituent service or 3. **CRM as a Strategy** – a focused means for cultivating, engaging with and expanding constituent communities. Each adding to the benefits of the previous.

Microsoft Dynamics CRM as a full Constituent Relationship Management suite, boasts functionality that satisfies all three definitions. Its capabilities are fast, familiar, and flexible, helping organizations of all sizes to find, win, and grow strong relationships.

Organizations are increasingly realizing that their data is the most powerful tool at their fingertips. Specifically, organizations with a better grasp on core metrics and key performance indicators (KPIs) find themselves able to make accurate, fact-based decisions, meet realistic staff goals and recognize industry trends. The goal is to understand which data points are most relevant to their users and constituents. The ability to tap into live data from all areas of the organization is one of the key strengths of Microsoft Dynamics CRM. The solution gives users fast access to contact data and history so they can work smarter and spend more time focusing on the mission of the organization.
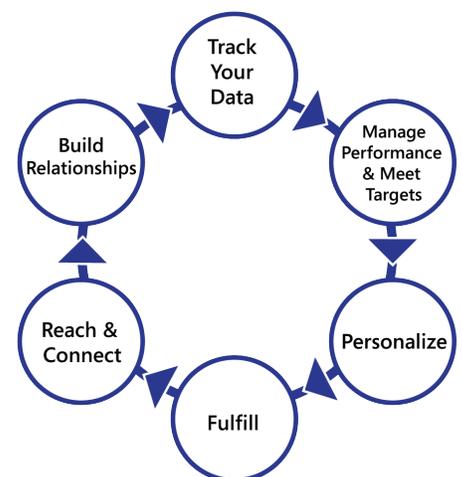
Microsoft has consistently invested and improved its Dynamics CRM offering with each new release. Going from 4.0 to 2011 saw great advances in integration capability, deployment options, user interface, reports and dashboards. And now with the arrival of the latest version, Dynamics CRM 2013, we will see a further leap in the user experience.

Some Feature Highlights

Outlook Integration: Dynamics CRM has the advantage of being a Microsoft product and thoroughly integrates with Microsoft Outlook. Where other solutions provide an "add-on" to Outlook, Dynamics CRM offers full functionality of the solution in a web browser or within Outlook while having live information travelling back and forth.

Reports & Dashboards: Dynamics CRM has extensive reporting capabilities. Reports and views can be created to present live reports for users. Dynamics CRM reporting can pull information from all entities and any field within them. Users are also given Dashboards (see right) that can be personalized to their day-to-day activities, ensuring they have the information most relevant to them right at their fingertips and in one convenient location. These are essentially live reports drawing on the real-time data housed in the central database, that show changing trends within the organization. Need to know more – users can click on these charts and tables to get more insight into the underlying information.
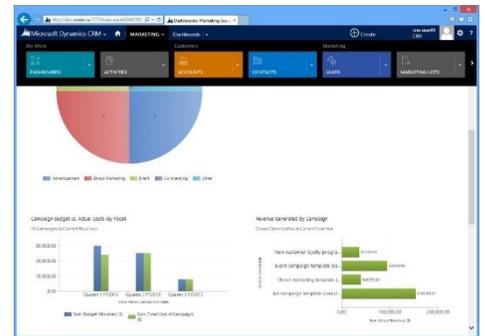
Business Intelligence: Windows Workflow Technology is a major component of Dynamics CRM. Workflows are sets of logical rules that define the steps necessary to automate specific business processes, tasks, or sets of actions to be performed on record within the database. This tool will allow an organization to transition manual tasks into automatic processes, freeing up more time for users to focus on the mission of the organization.

Personalization: Each user has the ability to personalize their Views, whether it is a dashboard or the list view on a specific entity, users can make the space their own. Dynamics CRM allows each user to create reports, views and charts based on their unique needs. The concept is a flexible environment that allows users to tailor their interface based on their day-to-day needs, increasing efficiencies as the solution grows with your organization.

Optimised For Touch & Mobile Devices: There will be a new user interface, which like Windows 8 will be touch-optimized for touch screens, tablets and mobile devices giving you the ability to swipe through forms and stages. Icons and fields are tailored for entry on a mobile device. For example, when in the Accounts screen the left navigation bar with hyperlinks for forms is gone, replaced by a pull down menu with all the related items, such as activities with the customer, documents uploaded for the customer, and customer service cases. These are large size touch-optimized buttons that are easy to work with.
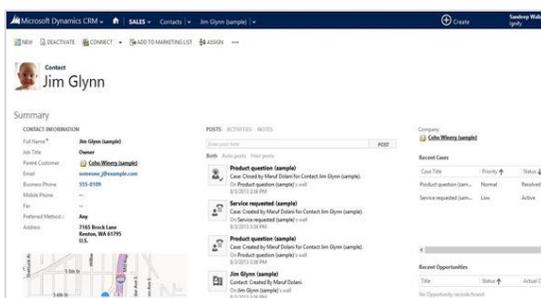
Social Integrations: For non-profit and public sector organizations, engaging with their constituents via social tools and media has steadily grown in importance. It is yet another way to reach out to volunteers, staff or donors. In Dynamics CRM 2013 the existing tools have further been enhanced with new integrations with Yammer (an internal organization 'Facebook' for staff), Skype and Lync. Communicating and more importantly tracking that interaction is now better than ever.

Process Driven UI (advanced workflows): The Process-Driven UI was seen in On-line deployments earlier this year. These forms allow an organization to track the progress of a registration, donation, grant, or similar actions that have multiple steps. The forms will also have configurable checklists that allow your organization to set requirements before

progressing to the next stage in the automatic workflow. So no matter what your process is, you can create a check-list and workflow that fits your organization's needs.

Anytime, Anywhere, Anyway: Like most software, the life of Dynamics began on PC's hosted in-house. With 2011, it also became available as a browser based cloud deployment, increasing the accessibility of the solution. Now with Dynamics CRM 2013 will come even more access options with an increase in the breadth of App's that the solution is available for Windows 8, iPad, Apple iOS & Android Phones Apps will allow users to connect to the database with ease, no matter where they are.

We Know the Non-profit and Public Sector

At Altus Dynamics we have built our business focussing exclusively on serving the needs of organizations who operate in the non-profit or Public Sector in North America. Needless to say we have developed a significant level of award-winning expertise in developing solutions to meet the specific challenges faced by these sectors – expertise that is available to you!

Education

Growing relationships with students, whether they are prospective, current, or alumni, is vital to any educational establishment. Dynamics CRM allows your organization to cultivate relationships by showing users a detailed history of interaction points. Users will be able to engage students in more meaningful ways based on the information tracking within Dynamics CRM.

- Recruit more efficiently
- Follow the growth of a student from prospective, to current, to alumni
- Connect with students in more meaningful ways

Social Services

Increase the care and services provided by your organization by utilizing Dynamics CRM for case, contract, and scheduling management. Utilizing the out-of-the-box functionality of Dynamics CRM, Altus Dynamics can work with your organization to make sure your unique requirements are captured in the solution.

- Track and manage your programs, cases and client data
- Track the interaction with a client and care workers
- Schedule employees

Not-for-Profit

Whether your requirements of Dynamics CRM are event, donation, or contact/member management, the solution will be able to handle your needs. Altus Dynamics has built up extensive experience and has worked with numerous organizations to make sure that each unique requirement is captured and users are given deeper insight into the organization.

- Fundraise and manage your donations and gifts
- Manage your grants
- Connect with members and donors

"I'm absolutely convinced that the use of Microsoft Dynamics is going to help us serve more kids, and serve them better. It was clearly the solution that met our needs"
Bruce McDonald
President & CEO
Big Brothers Big Sisters of Canada

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Pathways to Education

For more information on Altus Dynamics CRM and how it can improve your organization's operations, contact us today.

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About Altus Dynamics
Altus Dynamics is an information technology consulting and services company applying practical innovation through services and solutions that deliver tangible results for non-profit, education and government clients. Services include application development, ERP and CRM implementations utilizing the Microsoft Dynamics platform, including Microsoft Dynamics® NAV and Microsoft Dynamics® CRM as well as Microsoft SharePoint for employee portals.

Founded in 2003 and headquartered in Toronto, ON, Altus Dynamics operates across Canada and the United States. Altus Dynamics is a multi-award winning Gold Certified Partner, and Microsoft Dynamics Industry Solutions Vendor ("ISV"). For more information about Altus Dynamics please visit **www.altusdynamics.com**.