

# World Vision Canada Building Valuable Relationships with CRM 4.0

## Executive Summary

World Vision is a relief, development and advocacy organization dedicated to working with children, families and communities to overcome poverty and injustice.

World Vision's current Relationship Management system is comprised of many disparate systems that are limited in functionality and not integrated with DCSS; their donation management system which resides on an AS400 platform. This situation has resulted in missed opportunities, operational inefficiencies and presents significant challenges for their IT department to support.

As a result, World vision has decided to implement Microsoft Dynamics CRM to help them manage their relationships with donors, supporters and volunteers and as well better facilitate their Customer Service processes. Six departments are identified as candidates for Microsoft Dynamics CRM

- Volunteer Engagements – presently using ACT!
- Church Relations – presently using Excel
- National Reps – presently using Luxor
- Artist Associates – presently using Salesforce
- Major Development Group – presently using Raisers Edge
- Customer Service – presently using DCSS and Syntelate
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As each department has their own separate CRM software system the following systemic CRM inefficiencies were consistent throughout World Vision Canada.

- Multiple contact management applications – many inefficiencies
- No integration to the central donation management system - DCSS
- Limited Functionality – missed opportunities, accessibility challenges, operational inefficiencies

- Limited and inconsistent views of data – contacts, donors, opportunities etc.
- The IT department is challenged supporting so many disparate CRM systems.

## Phase One solution

Due to the inherent complexity of donor and volunteer management processes trying to integrate these disparate CRM systems with the existing donation management system combined with the current initiative by World Vision to re-design the underlying business Data Model, led World Vision to a strategy to implement CRM in a staged approach by department.

With the assistance of LegendCorp World Vision has completed the initial implementation of Microsoft CRM v4 into the Volunteer Engagements department replacing the existing ACT CRM system used by this department. Using out of the box Microsoft CRM functionality only, many modifications were made to Microsoft CRM to reflect the business requirements of the Volunteer Engagements department including; custom entities, forms and relationships, deep and rich business views of data and complex workflow rules. Utilizing Scribe Integration software, a complex and significant data scrubbing and migration of data from the ACT database to Microsoft CRM 4 was completed.

World Vision utilizes IBM Domino as their email system, because POP3 email connectivity is available in Microsoft CRM 4 and by adapting Linkpoint360; a CRM add-on product that integrates Microsoft CRM with Lotus Notes, CRM email functionality was implemented easily.



## Benefits to the Organization

The fact that all World Vision "Supporter" data will reside on one CRM system will be a huge benefit to World Vision Canada. All interactions with their Supporter base will be facilitated with homogenous and consistent data. Once the full implementation

across all five departments is complete all departments will share a single and relevant view of Supporter data. Relevant data is a key operational concept for World Vision Canada as not all departments will see all data for a Supporter. Privacy and security constraints dictate who sees what within each department, hence a legacy of five disparate CRM systems.

The ability of Microsoft CRM 4 to support multi tenancy environments, provide detailed access control to custom “Entities” and quick and adaptable screen design tools makes it a perfect fit for World Vision business constraints across all of their departments. As Microsoft CRM sits on the Microsoft technology stack, support for Microsoft CRM is compatible with existing IT processes. This completely resolves the major issue World Vision has of being able to support five disparate CRM solutions.

#### Next steps

As described earlier World Vision will implement Microsoft CRM to five departments in a staged or phased approach building knowledge and skills as they move through each implementation. The multi tenancy aspect of Microsoft CRM v4 is being considered seriously as an option to segregate business data by department if custom entities and subsequent security does not completely resolve requirements.

Full 2 way data integration between Microsoft CRM 4 and their donation management system (DCSS) will figure prominently in the next 2 implementations and going forward, World Vision is exploring options and middleware utilities to accomplish this. As mentioned earlier Scribe Integration software was used to migrate ACT data into Microsoft CRM 4 for the Volunteer Engagement department with excellent results. Additional functionality will build MOSS integration as well as a seamless donor experience that includes MOSS, CRM and the backend DCSS (AS/400) environment.

LegendCorp knowledge, experience and expertise with Microsoft CRM, SQL 2005 and CRM integration were a significant benefit to World Vision during this implementation. LegendCorp will continue to build on this relationship with World Vision by creating

value and providing implementation and integration expertise.



For more information regarding the World Vision CRM implementation or to discuss other capabilities of our CRM team, please call Kevin Oakes at LegendCorp. 416-477-5712 or email [Kevin.oakes@legendcorp.com](mailto:Kevin.oakes@legendcorp.com)