Concurrency Assists National Non-Profit with Website-to-Dynamics CRM Data Integration

Background

As a membership organization, this national non-profit advocacy group regularly processes new member data. One of the organization's focuses is to make the sign-up process easy for users. This helps to maximize the likelihood that a potential new member will complete the sign-up process. It also helps the organization's staff to streamline its back-end operations, such as by removing manual data entry from the process.

Recently this organization's internal IT team was working on a specific project to improve new-member data handling. The team was building a website for new members coming from a particular third-party association to conveniently use when joining.

Our client asked for our assistance in integrating that new website with the organizations customer relationship management system so the data would automatically flow into the correct fields in Dynamics CRM.

Solution

We helped to architect the back-end integration of the new website and Dynamics CRM, working closely with the internal team. The objective was that the new member would just push a button and his or her data would flow right into the CRM system—no phone calls or manual data entry required.

We started with a business requirements gathering workshop with project managers, the CIO, and the lead developer on the website. We then proceeded with another workshop focused on all the technical pieces that needed to be in place.

With the requirements in hand, we architected a technical solution, documented it, and presented the solution. Our client then evaluated the presentation and gave the go-ahead to build the solution.

As we did so, we worked closely with the website's lead developer so we could jointly address questions and opportunities that came up in the process.

One important aspect of this project was ensuring smooth integration with a third-party add-on within the CRM system. This add-on handled aspects of the organization's invoicing to members. Working with the organization's internal team, we helped ensure that information collected from the new website was appropriately delivered into the custom entities used by the invoicing system.

In this way and others, this project is an excellent example of leveraging technology that was already in place rather than assuming it's necessary to replace it entirely.

Results and Next Steps

The actual build time for this project was a compact period of two to three weeks, which included testing to validate the design through a QA phase.

The project proceeded efficiently throughout each phase, through to rollout to production. The smooth process was made possible by the internal team's keen awareness both of its needs and of the benefits of an AGILE approach to design and implementation. The project is an excellent example of why it works well to follow a pattern of conducting business analysis, finding the gaps, architecting, building, and the deploying.

That efficient process led this project to conclude ahead of schedule and with fewer hours than budgeted. That favorable outcome enabled our client to identify some additional priorities for us assist with without expense beyond that originally budgeted.