

IAVI Turns to Dynamics CRM to Manage Donor Relations from Offices Around the Globe

Summary

IAVI had long used a LAN-based CRM system to manage its financial information and relationship activity with donors and partners. However, user difficulties prevented wide uptake across the organization and with the aging of the platform, IAVI's IT staff chose to deploy Dynamics CRM, hosted in the cloud. IAVI had already implemented SharePoint and Office 365; the cloud-hosted CRM solution allowed IAVI to expand on those successful roll-outs. Concurrency provided expertise and support to IAVI's IT department through design and deployment of Dynamics CRM, which integrated with Office 365 and SharePoint.

Solution

Previously, employees at international offices could access the database only through a Citrix connection and had to request assistance from IAVI's IT staff in order to run queries, since the interface's complexity required users to know the names of fields on the back end and on which table they were located.

The solution will help IAVI increase information sharing throughout the organization. "A lot of our work involves IAVI staff members from different departments working with the same external people," said Colleen Boyne. "CRM will help us manage those relationships. Eventually we expect that every department will be using the system, and we may move our entire grants management system into CRM."

"Dynamics CRM solved both our access problem and our user adoption and ease-of-use problems," said Colleen Boyne of IAVI. "The advanced find feature is really great and a huge improvement from what was available for queries in our old system. Now all users are able to easily set up their own views and search."



Organization

International AIDS Vaccine Initiative (IAVI)

www.iavi.org

Project Location: New York, NY

Organization Type

Global not-for-profit, public-private partnership.

Organization Profile

The International AIDS Vaccine Initiative (IAVI) is a global not-for-profit organization whose mission is to ensure the development of safe, effective, accessible, preventive HIV vaccines for use throughout the world.