

CASE STUDY – THE CHILDREN'S WISH FOUNDATION



The organization

The Children's Wish Foundation of Canada is the authority on wish-granting in Canada. With two decades of wish granting, and over 12,000 wishes behind them, they have fulfilled more wishes for children in Canada than any other wish granting agency.

What began in 1983, on the kitchen table of an inspired and committed volunteer named Laura Cole, has blossomed into a national organization with chapters in every province. From humble beginnings, granting fewer than 20 wishes a year, the foundation has established the capacity to fulfill upwards of 800 wishes annually.

The Children's Wish Foundation of Canada is extremely proud of the fact that it has never denied an eligible child a wish and has been able to fulfill some of the most complex wishes imaginable.

Granting wishes to children with high-risk, life-threatening illnesses is the primary line of business and the most powerful way that The Children's Wish Foundation fulfils its mandate. Staff and volunteers work tirelessly to maintain the highest quality of service to the 'wish families' with attention to all details to ensure the total satisfaction of each and every 'wish child'.

The challenge

At a 50 percent growth rate in five years, the demand for a more efficient system was needed. The old system was not able to track 'wish child' details from start to finish so valuable information wasn't being tracked. The system was often referred to as a filing cabinet, which had information in it but was unable to process it. This led to employees not seeing the value in the system, and keeping records up to date became a major challenge. Often, there would be two files for a single wish, one at the national office and the other in the provincial chapter.

Reporting

Aside from the data not being complete, the system had very little built in reporting. Valuable company reports were being created and updated manually. The forms needed for the wish granting process were created manually, which often took a minimum of ten minutes. The inability to run reports and forms easily was inefficient and time-consuming.

System administration

With a system that was getting outdated, Lotus Notes had some constraints around administrating the product. The system was not user-friendly and, if customizations were needed, a Lotus Notes specialist would have to create them. Even simple tasks of creating additional fields to track information had to be done by the specialist. The major challenge with the system is its inability to integrate with other programs.

Wish Cost Tracking

The current system was not integrated to the financial system. Children's Wish was using Lotus Notes and ACCPAC and integration between the two was challenging. Costs were captured in the Accounting system with no tie back to the original Wish. Reporting of cost information was only available at high-level and required a significant amount of manual tracking. Meaningful information was lost due to the lack of integration between systems.

Financial reporting

Creating meaningful financial reporting was a challenge faced by the Children's Wish team, as they were unable to produce budget to actual statements. In addition, they did not have the flexibility to dissect their financial information in a variety of ways (i.e. by chapter/department).

SECTOR

Not-for-profit

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BDO is the sixth largest accounting and advisory firm in Canada with 95 offices nationwide. Our professionals have the expertise to serve owner-managed, large and mid-market companies, communities and non-profits in a broad range of industries.



Why Microsoft Dynamics GP and CRM?

The solution presented to The Children's Wish was to replace Lotus Notes with Microsoft Dynamics CRM and to replace ACCPAC with Dynamics GP. As the company was already using Microsoft Outlook with Exchange Server, the solution was appropriate because they could use the Microsoft CRM Outlook Client for easy access. There is also the need to connect remotely to the system if not in the office. Using Citrix they could access the CRM Web Client and the CRM Outlook Client. The recommended Microsoft technology would fit easily into the existing infrastructure.

BDO customized CRM to work the way Children's Wish does, using the pre-built entities and creating custom entities to track the information as needed. The wish child, along with the wish details and related contracts are tracked easily within the system. Custom entities were also created to track related information, such as release documents, paraphernalia, doctors, nurses, and social workers, and to be able to auto-generate national and provincial data for each wish.

Reporting solution

The main reporting solution implemented was SQL Reporting Services. BDO worked with Children's Wish to create over 30 reports, including liability releases, forms, and third party information sheets. All reports print within the 'Wish' or 'Contact' screens with a simple click of the mouse, which removed the need for filling out the reports by hand. Even forms that still need to be filed out manually (original signatures required) can be accessed and printed from within CRM. This allowed Children's Wish to easily maintain version control on the forms and ensure that the national team was all using the same version.

To do the company reporting, Children's Wish used Dynamic Pivot Tables and Dynamic Worksheets in Microsoft Excel. The files sit on the users machine and, when opened, they are automatically updated with the current data in CRM to give accurate and up-to-date reporting.

Integration with finance

Using the Dynamics GP and the integrated Analytical Accounting functionality, the finance is able to capture 'cost by wish' within the finance system without the need to have separate GL accounts for each wish. When the cost information is captured it is displayed within CRM to the Wish team. This provides real-time access to costs, minimizes manual reconciliation and eliminates the need for duplicated entry. This also provides the ability for Children's Wish to track detailed cost information and report on such details down to the wish level.

Financial information

With the use of Microsoft Dynamics GP, Children's Wish is now able to budget at the right financial level and produce meaningful financial statements. This information can be easily shared at a relevant and meaningful level of detail to each chapter and in a consolidated manner. The organization's budgeting process has already been improved with the use of Excel Based Budgeting by allowing the creation of standard budgeting templates. Historically, it had allowed users to provide information in a variety of formats, which caused its process to be extremely manual and cumbersome.

Automation

Using the Microsoft CRM Workflow Manager, BDO created workflows to generate emails. The majority of the workflow fell around the approval process of a wish. When a wish is added to the system, there is an email sent to the National Wish Director who approves the wish. Once the decision is made whether or not to grant the wish, an email is sent back to the owner of the wish notifying them of the decision.

Results

The results after implementing Microsoft CRM are better than expected. The built-in reporting has made it easier to view and print reports without a hassle. The employees are more efficient and can focus on tasks that matter. The data is cleaner, as there are more pick list options instead of text fields, which cut down the amount of human errors.

The automated process created by the workflow engine has made the process of approving wishes much easier and less time-consuming. Emails are automatically sent when certain criteria is met, and tasks are created and assigned to the proper staff members when needed

The system has brought the company closer and has improved the communication regarding wishes. The National Wish Director's quote, "This is the best thing that ever happened to us," says it all about the system, and shows the improvement Dynamics CRM and Dynamics GP can bring to an organization.



BDO Solutions helps small, medium and large size organizations align technology to their overall business strategies using Microsoft technology. We specialize in implementing Microsoft Dynamics GP and NAV and Microsoft Dynamics CRM enabling our clients to streamline their business processes and improve overall operational efficiency. For additional information please contact:

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