




Inciper

CASE STUDY

How a charity increased the speed of services and funding allocation using Microsoft Dynamics 365

How a charity increased the speed of services and funding allocation using Microsoft Dynamics 365

Inciper recently worked with a leading UK charity supporting families raising disabled and seriously ill children and young people. They are the largest charity offering financial grants to support families in need of financial support, successfully arranging over 150,000 grants or services worth more than £48 million to families in need.



Addressing Business Challenges

The charity reached out to Inciper to discuss technology solutions which could replace a bespoke, in-house system to manage grant allocation, tracking beneficiaries and tracking applications. They were eager to improve and automate organisational processes, in order to manage applications and deliver funding and services to applicants in a quicker and more efficient way.

Key Goals:

- To improve speed of service - focus staff on value creation activities and away from the inefficient tasks caused by obsolete systems and processes
- Enable a greater percentage of funding to be allocated to deliver successful grant application - automate processes, utilise inbuilt intelligence and self-service to drive out nonvalue add activities
- Increase visibility and control - provide added data analysis, staff performance, process and grant funding compliance on real-time application events
- Reduce the risks posed by a legacy technology platform and IT infrastructure

A Business Value Assessment powered by Microsoft Catalyst

Based on their goals, Inciper proposed utilising Microsoft Dynamics 365 and the Microsoft Power Platform following a joint partnership to undertake a Microsoft Catalyst engagement in order to fully realise the benefits of digital transformation.

Following the Microsoft Catalyst framework, Inciper conducted a series of workshops with various stakeholders across the business to develop the solution proposition and outline a business value assessment, which determined the roadmap of product implementation and adoption, and the expected business value as a result.

Inciper outlined how a configured solution of Microsoft Dynamics 365 integrated with an in-house built portal, could deliver their goals, setting out a roadmap for delivery.



The Solution

Key components of the implemented solution included:

- **Microsoft Dynamics 365 Customer Service** – supporting case management of applications and grant processing, including queue management, approvals and review process
- **Power Apps** – providing user experience for internal teams involved in the end-to-end process
- **Power Automate** - supporting integration with their website and automation of key processes

Benefits of Microsoft Dynamics 365

After a successful implementation, the following business and applicant benefits were realised:

- Applicants gain real-time 360-degree view of their application status with easy self-service capabilities
- Teams now orchestrate automated and personalised grant process journeys
- Telephone contact was minimised for simple queries to provide more bespoke support
- Systems are now easier to use, quicker to administer allowing more time for added value activities
- Average grant processing time reduced



Why Inciper?



The charity required a knowledgeable and collaborative partner, who was capable of working across departments and with in-house built systems and processes to deliver the hybrid ecosystem of solutions to meet their goals. Inciper's focus on delivering value to both the organisation and the applicants as early as possible in the project aligned with their priorities.

Inciper's flexible approach meant that the charity's teams were also able to upskill and own elements of the deployment and end state solution. With an ongoing relationship and Inciper Managed Service provision, the charity can be self-sufficient, but also engage Inciper for advice, issue resolution or support change on an ongoing basis.

To learn more about Microsoft Dynamics 365 and the Microsoft Power Platform, the Inciper RAPID delivery methodology or our other clients visit please visit our website at www.inciper.com or email us at info@inciper.com

