



# Case Study

## Customer Profile

The Anne Carlsen Center is a not-for-profit organization that works with people with developmental disabilities to improve the quality of life. They offer numerous programs through five locations across North Dakota.

## Business Solution

Anne Carlsen Center implemented Microsoft Dynamics CRM to increase their level of customer service and streamline their processes.

## Benefits

- No manual reentry
- 360 access to customer information
- Reports for sales follow up

## Demographics

**Industry:** Not for Profit

**Employees:**

**CRM Users:** 50

## Anne Carlsen Center

### Situation

The Anne Carlsen Center is a not-for-profit that works with individuals with disabilities, teaching them how to advocate for themselves, while creating a life of independence.

Their specialized offerings include:

- Annie's House: a facility designed to accommodate the needs of skiers with both physical and cognitive disabilities
- Autism Services
- Assistive Technology
- In-Home Services
- Therapy
- Canine Services
- Community Based Services
- Education: a school in Jamestown providing the best learning opportunities for children with learning disabilities.
- Medically Fragile: provide hospital-level care to a majority of the state's most medically-fragile children.
- Early Intervention
- Home Life Services: residential services offering individuals their own space.
- Specialisterne: helping people with autism secure meaningful employment based on their individual characteristics and talents.
- Taylor Made Living: Living arrangements for adults with cognitive impairments designed to accommodate work placements and provide appropriate assistance with daily living skills.

Through their five locations across North Dakota, the Anne Carlsen Center has serviced thousands of clients and employs hundreds of staff members. Because of the large variety of services and divisions, they faced a disconnect between departments and extreme communication barriers.

Communication between departments broke down mainly because of the use of several different software solutions that didn't integrate with each other.

For example, if a child entered Anne Carlsen's Early Intervention program and then returned the next year to enroll in Autism Services, the autism team wouldn't have access to the child's records from Early Intervention or even know that child was enrolled the year prior.

## Products

### Microsoft Dynamics CRM

- Sales
- Marketing
- Phone connectivity
- Accounts

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## Challenges

The main challenges that the implementation team at Anne Carlsen identified were:

- Data was stored in a mixture of technologies
- No interrelation between systems/processes
- Labor intensive/redundant data entry
- Non-existent automated reporting
- Information not available for leadership review

To face these challenges, the leadership team started looking for Customer Relationship Management (CRM) systems that would unify the company. While they did consider software specific to the health care industry, they soon realized it didn't have the complete functionality they found in Microsoft Dynamics CRM.

## Planning and Implementation

The Anne Carlsen Center already utilized DFC Consultants as their Microsoft Partner for Dynamics GP, so choosing them to assist with Dynamics CRM was an easy decision. The implementation team from Anne Carlsen and from DFC started the planning process in September 2013 by outlining goals, reviewing internal processes and talking with all effected parties including: employees, partners, suppliers and customers.

By meeting with all effected groups immediately, the implementation team was able to not only understand how each group would interact with the system, but also generate excitement about the upcoming software.

## Goals for the System

After conversations with key stake holders, the implementation team at Anne Carlsen identified the following goals for their new CRM system:

1. Prevent potential customer issues
2. Determine the best strategies to increase customer satisfaction
3. Provide better quality services
4. Create more robust marketing campaigns
5. Identify new opportunities

These goals became the guiding path to implementation and customization of Microsoft Dynamics CRM.



## Implementation and Customization

With the help of DFC Consultants, Anne Carlsen implemented Microsoft Dynamics CRM Online, the hosted version of the software, giving each of the 50 users access to the system anytime, anywhere. CRM was also linked directly to each user's Outlook, allowing email strings and attachments to be automatically loaded to each account in the system. Their list of current customers and their information was seamlessly uploaded into CRM through an Excel file.

DFC Consultants transformed their CRM to fit their specific healthcare needs, adding information fields for medical forms, case notes, doctor's sign offs and more.

## Phone Connectivity

The Anne Carlsen Center receives many phone calls from prospective and current clients. In order to ensure more effective and efficient customer service, CRM was integrated with their phone system so each time they receive a call, the account is automatically pulled up that coincides with the phone number, giving the operator all of the customer's information right away. That call is then automatically logged, allowing sales personnel to easily track calls and take notes of what follow-up needs to be completed.

When calls come in that are not linked to an account in the system, a new account is automatically created. Once the new account is touched by an employee of Anne Carlsen, whether that be through entering notes or updating contact information, it becomes an official account in CRM. If the account isn't touched within 48 hours, it's automatically deleted. This safeguards against the creation of needless accounts whenever a wrong number or telemarketer calls.

When an employee needs to make a call, they are able to pull up the customer account in CRM and launch the call through a single click of the phone number.



## Ask Anne

One of the main initiatives behind implementing a new CRM system is a program in development called Ask Anne. As the Anne Carlsen Center has grown, they have experienced a need to develop processes and procedures for responding to customer needs, tracking inquiries and following through to provide better customer care.

The Ask Anne program will streamline all customer service through a single department, eliminating potential clients calling multiple numbers trying to figure out the correct contact. Through the one number, they will get routed to finding the right diagnosis, program and help they need.

An Ask Anne form that's currently in development will soon be featured on their website as well. All of the fields will correspond with CRM fields and automatically generate a customer file in CRM with the information inputted through the website form.

## Training

Prior to implementing Microsoft Dynamics CRM, all processes were done manually on paper. In order to assist in the culture change, small training sessions were held and individual training was done with live calls and actual customers throughout the day. Monthly Lunch 'n' Learns were also held via conference call with all of the Anne Carlsen offices throughout the state. CRM tips and tricks would be shared, along with an open dialogue of how people were using the program and what was working for them.

## Immediate Benefits

- Access to admission reports from every department detailing reasons for approval or denial into the program. Prior to implementing Microsoft Dynamics CRM, staff members didn't know why an applicant was denied from specific programs.
- A complete 360 approach to the customer. Ability to access all information on a client in one program, increasing the level of customer service and satisfaction.
- No more manual reentry between programs saving hundreds of labor hours each year.



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