



Social Services

A more effective operation

Successful management of a not-for-profit organization is as demanding as it is detailed. Meticulous reporting practices and careful administration of operating expenses and cash flow are essential for meeting regulatory compliance. Both are also important for demonstrating the efficient use of donated and allocated resources to secure future funding. All this can be extremely challenging when working with multiple funds and grants, each with its own set of reporting requirements.

Microsoft Dynamics™ delivers a powerful business management suite specifically focused on the unique needs of social services and other not-for-profit organizations. Our tools empower organizations to streamline and optimize their finances and reporting obligations for more effective operations. That translates into more time focused on providing services and value for their beneficiaries. From commitment management to fund management, Microsoft Dynamics promotes accurate and timely reporting, easily accessible data, and automated processes to reduce daily overhead. The tools are designed to help you successfully operate today and secure the funding you need for future growth.

Financial management solutions for social service agencies

Microsoft Dynamics applications help agencies manage their expenditures and appropriations by allowing employees to easily see and analyze the costs and activities under their control. Microsoft Dynamics solutions provide detailed, up-to-the-minute financial reports that help employees to make informed purchasing decisions, comply with reporting requirements, and ensure financial integrity and accountability. Our tools can help increase confidence in your agency's financial management skills by creating accurate and timely reports tailored to the information needs of the user. Tighter controls help improve cash flow and tie spending directly to

programs, fund sources, and objectives. Our solutions free up more time to be spent on your core mission by streamlining administrative functions, including:

Fund Management: To help social service agencies fully adhere to increasing reporting requirements, Microsoft Dynamics offers fund management applications that can accommodate the special regulations, restrictions, and limitations involved in managing multiple funds across multiple projects. By automating fund management, our solutions help reduce errors associated with manual entry and manual reconciliation of funds. Most importantly, it makes reporting easier and more accessible, helping to meet reporting guidelines in a timely fashion.

Grant Management: Managing income resources through all phases of grant acquisition and management can help your agency remain accountable and comply with regulations throughout the process. Microsoft Dynamics solutions help track grant funds and the projects to which those funds need to be applied, help monitor expenditures, and help deliver timely reports for full disclosure. With up-to-date information about successful budgeting and grant performance, you can focus your time and energy on the management and allocation of grant funding, rather than spending time tracking allocations. Integrated applications created by our certified development partners provide tools that can automate the processing of applications, making awards, and administering and closing grants.

Encumbrances and Commitments: Effectively tracking impending purchases and requisitions against budget allocations is essential to helping your organization protect against overspending. It also ensures that administrators know how much of their budget has been accounted for at any given time. With Microsoft Dynamics solutions, managers can easily set aside funds for future contracts, as well as plan and stay on track for utilizing the appropriation. All this helps ensure that funds are available when payments are due while reducing the time it takes to track expenses.





Integrated HR management and payroll

An effective human resource management solution can help social service agencies track all aspects of their employee relations, from application and hiring, to compensation and benefits, to certification and education tracking, and much more. Microsoft Dynamics offers systems for managing employee data, processing payroll, tracking benefits, and managing performance. Comprehensive reporting capabilities can help your organization comply with employment eligibility and injury-reporting requirements. Using browser-based portals, authorized managers and employees can access HR and payroll data. And because Microsoft Dynamics is an integrated business management solution, information can be entered and accessed from one system, reducing IT complexity, eliminating data re-entry into multiple systems, and reducing overhead costs.

Deliver cost-effective projects on time

If your agency is project-driven, Microsoft Dynamics can help you keep close control of project performance, costs and revenues, and labor, as well as other resources. With a wide spectrum of tools and technologies, Microsoft Dynamics solutions for project management and accounting help you to accomplish your project goals and achieve outstanding results—on budget, on time, and with excellent resource efficiency. Microsoft project management and accounting solutions can help you structure and run your projects with optimal cost-efficiency. With these software tools, you can create the billing structures you need and track the actual expenses of labor, materials, and other costs. Reduce the length of invoicing cycles, stay on top of unbilled receivable amounts, and monitor changes in key values such as costs or margins.

Better retail management at the point of sale

For agencies that offer products in a retail setting, Microsoft Dynamics can help manage point of sale (POS) activities. Easy-to-use, affordable, and reliable applications are used by thousands of retailers in dozens of verticals, helping them manage inventory, control cash flow, reduce costs, and improve customer service.

Relationship management solutions can increase satisfaction and improve productivity

Every day, social service agencies must deal with rising constituent demands while needing to communicate vital information to their communities on applicable laws and policies. Recent budget cuts and reductions in spending are forcing agencies to cut services, which could leave constituents without the services they need.

Using Microsoft constituent relationship management (CRM) solutions, social services agencies can improve constituent service delivery and increase the efficiency and effectiveness of core services. With Microsoft Dynamics CRM, your agency can quickly and accurately respond to constituent and staff requests, and improve information-sharing internally and externally. It can also help reduce operational costs by automating business processes and help increase customer satisfaction.

Reducing agency-bound processes can improve staff productivity, lowering labor costs and freeing time for other mission-specific activities. By centralizing and automating the intake of constituent requests, Microsoft Dynamics CRM creates an audit trail that organizations can use to analyze service-delivery speed and costs. Management can study the

number, type, and timing of requests to measure performance and adjust budget priorities. Social service agencies often find that adopting a Microsoft Dynamics CRM solution can help improve constituent communication and satisfaction with services—even before efficiencies or process improvements can be implemented. Providing multiple channels to interact with your agency, automating services, and personalizing information gives constituents—both individuals and businesses—more choices and greater control.

Optimal performance with Microsoft Dynamics

Microsoft has worked closely with social service organizations to understand the challenges they face and offer effective solutions for the complex needs of this industry. Our solutions, combined with integrated applications created by our certified development partners, are helping organizations around the world automate their processes and information to provide better accountability so they can free up more time to serve their beneficiaries.

Innovative integration

Microsoft Dynamics is built with the goal of delivering a flexible set of solutions that can be easily adapted to your operational needs. Built on the Microsoft® Windows Server™ platform, Microsoft Dynamics allows you to take advantage of technologies such as Microsoft Windows® SharePoint® Services for knowledge management and collaboration, Windows Terminal Services for extending access to data and processes, and Web services for even greater extension and integration with constituents and other agencies. Microsoft SQL Server™ delivers a solid foundation for collecting, analyzing, and reporting data across your agency's information management systems. And a deep integration with Microsoft Office System applications such as Microsoft Excel®, Word, Outlook®, Internet Explorer, SharePoint, and

EFFECTIVENESS

Visio® allows you to design the forms and delivery systems that best suit your data management requirements. Microsoft is committed to designing and delivering the integrated systems that will give your organization the greatest ability to work efficiently and reduce operating overhead.

Partners with industry expertise

Microsoft Dynamics solutions are delivered by a network of partners with expertise in social services and other not-for-profit organizations. They can provide local, personalized service—from planning and implementation, to customization, to ongoing support and education. That means you get world-class business solutions from professionals who understand your organization and will be there as your needs change.

Plan for growth

Organizations need systems that can deliver a strong return on investment (ROI) in meeting current needs while providing for the opportunity to scale dramatically to account for organic growth, acquisitions, or changes in business focus. Microsoft Dynamics, along with Microsoft server technologies and productivity solutions, offers tremendous flexibility and scalability to implement the solution to meet today's requirements and to allow for substantial future growth and change.

To learn more about how integrated, affordable Microsoft Dynamics capabilities can help you in the demanding not-for-profit industry, visit

www.microsoft.com/dynamics/SocialServices



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Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. Built to work with Microsoft technologies, it works easily with the systems your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, helping increase the productivity and effectiveness of your business, and helping you drive business success.

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