

AUTOMATE

Accelerate and Improve Federal Grant Management with Microsoft Dynamics CRM

As budgets continue to shrink, today's federal agencies must ensure they spend every dollar wisely and get the most from their current resources. In many agencies, significant financial outlays occur in the issuing and management of grants — to individuals, organizations and other agencies.

Simply stated, more agencies are increasing the number of grants they award while decreasing the staff needed to create, approve and manage them. The use of disparate technology systems and applications for the grant process also creates costly inefficiencies and inconsistent user experiences.

Developed with the help of industry experts and agency end-users, Microsoft® Dynamics™ CRM Grants Management Solution is an all-in-one, integrated solution that streamlines the grants process from initial solicitation through approval and awards. By automating grants management, Microsoft Dynamics CRM allows your organization to track grants, allocate funds and demonstrate accountability — all through a single, cost-effective solution.

Because each agency handles grants differently, this flexible and scalable solution can be tailored to fit an agency's process. It integrates with most legacy applications, while allowing each user to take advantage of a user-friendly and intuitive Microsoft interface.

Microsoft Dynamics CRM Grants Management Solution helps federal agencies to:

- Automate grants management
- Track grants and allocate grant funding
- Implement and manage grants with greater transparency
- Leverage existing technology to simplify grants management with a single solution
- Collaborate with recipients and others involved in the grants process
- Process and track payouts

Familiar technology makes for easier adoption and implementation.

The Grants Management Solution leverages existing Microsoft technology with the familiar user experience offered by Microsoft Outlook® and Office. The intuitive interface provides managers and administrators of federal grants with an at-a-glance view of their incoming mail and allows them to manage their grants workload and communications from a single, centralized location.

Designed to be a natural extension of Microsoft Office and Outlook, Microsoft Dynamics CRM's real-time updates provide federal grants managers with instant access to the most recent application and grant postings. Customized workflow shows each decision-makers' tasks and responsibilities, tailored to their specific role in reviewing grant applications.

Agencies can integrate back-end domain specific systems — such as eligibility engines — and financial systems through web services and various middleware data exchange options. Microsoft Dynamics CRM can also leverage an organization's SOA (Services Oriented Architecture) initiatives.

Ensure each grant is reviewed and awarded with consistent and transparent procedures.

Transparent integration enables federal grant managers to open an in-process solicitation in Microsoft Outlook and begin working directly with the CRM grants application. To simplify grant processing, the Workflow Assistant automatically tracks the progress of the solicitation and provides a list of tasks to complete at each stage of development.

As federal grant managers perform final reviews, they have access to all pertinent grant information, including funding levels and eligible applicants, as well as the accompanying documents from the Microsoft SharePoint® repository. Once

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complete, the entire solicitation package is conveniently posted as an XML file to Grants.gov. The posting automatically triggers the workflow to notify the appropriate individuals that a solicitation has been posted.

Utilize views that make it easier to review and compare grant applications.

In order to perform critical grants management activities, Microsoft Dynamics CRM's Grants Management Solution tabular view includes the details and information necessary for key decision-makers to review the applicant's qualifications, rank the applicant's eligibility and review the participants.

To learn more about Microsoft Dynamics CRM Grants Management Solution, please contact your Microsoft Account Representative, or visit us at www.microsoft.com/industry/government/grants.

As a final step, grant managers input funding levels and take advantage of the tight integration with SharePoint to review notes or attach additional documents to the grant package. As the tasks are completed, the automated workflow expedites the process and seamlessly launches the next series of workflows.

Simplify grant approval and other administrative notifications and data management.

Without leaving Outlook, the grants program manager automatically receives an e-mail notification of the application approval. A single click takes managers directly to the CRM grants application where they can approve the levels of funding, generate pre-award notifications and mark the tasks complete. For quality control and historical recordkeeping on the entire grants application, award and administration processes, managers can see at a glance all the completed tasks done with this application, by whom and when.

Microsoft Dynamics CRM's ability to send outbound real-time messages lets managers notify the applicant that a grant application has been approved or rejected. It automatically tracks the status of the grant application and sends out the appropriate notifications. Managers can also process and track payments via the easy-to-use interface, which integrates with back-end financial systems.

Improve access to and the accuracy of grant reporting.

As grants move through the approval workflow, grant managers are able to leverage the full power of Microsoft SQL Server® Reporting Services to analyze data, make budget projections or compare awards in a convenient, dashboard summary view. Microsoft Dynamics CRM also automatically integrates with Microsoft Excel for other ad-hoc analysis.

