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Malin Holm  
The Matthew Project

## Overview

### Industry

Local charity

### Business Situation

The Matthew Project needed a new CRM system to track and report on its process for continued project funding.

### Solution

Microsoft Dynamics 365 deployed to 10-15 users with Power BI.

### Main Benefits

- Accurate data capture at point of source
- Paperless processing
- Reporting compliance
- Data-driven insights to improve coverage and service

## BACKGROUND

The Matthew Project is a drug and alcohol support charity based in Norwich providing support services to vulnerable groups and individuals in the Norfolk and Suffolk region through an expanding referral network, and by direct enquiry from participants.

In January 2017, The Matthew Project launched its 'On Track' service that helps hard to reach young people in its area get into work, education or training through coaching, mentoring and support.

This initiative is funded by the European Social Fund (ESF) and is distributed by the Big Lottery.

With stringent requirements for adherence to record management and reporting, it was essential for The Matthew Project to implement a new CRM solution to manage these processes.

Microsoft Dynamics CRM Online (now Microsoft Dynamics 365) was selected and Preact was awarded the contract to implement this.

## THE RESULTS

Just 6 months after deploying Microsoft Dynamics, Malin Holm the data lead at The Matthew Project discusses the early success of this project:

*“For each individual that we help, we must collect and submit proof of their eligibility to work in the UK and this documentary evidence must be captured and stored in line with the requirements of our ESF funding.*

*Thanks to the Microsoft technology we are using, we've been able to handle this with entirely paperless processes!*

*Our coaches and mentors are equipped with Surface Pro devices. When they are meeting prospective applicants they are able to use Dynamics 365 in offline mode to electronically complete the documentation that is required to enrol an individual.*

*This process involves multiple templates and various forms which must be completed and signed before eligibility can be confirmed.*

*In some of our other projects we'd encountered challenges with data collection but using this technology has proved to be a very positive experience for all parties.”*

THE  
MATTHEW  
PROJECT  
no compromise on hope



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Malin Holm  
The Matthew Project

### **For more information**

To find out more about Preact and Microsoft Dynamics 365 please call 0800 381 1000 or +44(0)1628 661 810

Or, visit [www.preact.co.uk](http://www.preact.co.uk)

*“During these meetings our partner representatives work through the enrolment process and collect all the supporting data, documentation and photos that are needed.*

*The people we help generally don't have mobile devices so it means we are providing an efficient service when we can complete these forms in person during the interview, and then send this data to Microsoft Dynamics 365 once complete.*

*These documents run to as many as 80 pages and handling this electronically makes the process very sustainable which avoids the need for our partners to lug masses of paper forms and then store the completed applications.*

*For us to retain ESF funding it is imperative that the quality of our reported data on this project is correct and complete.*

*Using Dynamics 365 our partners are guided through a series of steps which provide clarity on what needs to happen and this enforces the rules that we must follow to ensure these processes are compliant with the terms of our funding.*

*With our ability to handle this as a paperless process we are receiving encouraging feedback from our funders.*

*This reflects the work that we have done with Preact's help to design Dynamics 365 to handle these workflows, as well as the great work carried out by our partners.”*

The Matthew Project has connected its Microsoft Dynamics 365 database to Power BI which has created immediate benefits in enabling them to gain insight from their data as Malin explains:

*“When we look for emerging trends and patterns we could easily spend 20 hours or more collecting and analysing our data but using Power BI everything we need is available in real-time.*

*This is already helping us develop better profiles of the people who we work with, it means that we can be more responsive to anticipate their needs and be more predictive in identifying vulnerabilities.*

*Further Power BI analytics will also help to map our activities that helps us understand our local coverage.*

*Undoubtedly there is more to come and we are eagerly looking forward to using Dynamics 365 to manage further projects!”*

To learn more about The Matthew Project, visit [www.matthewproject.org](http://www.matthewproject.org)

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