

EMPOWERING COMMUNITY ORGANIZATIONS WITH DYNAMICS 365 INTEGRATION



Client Overview

The Consolution Project is a distinctive partnership network, comprising Coordinators, Coaches, and Contributors, devoted to enhancing the health, effectiveness, and sustainability of Community Organizations. Their training areas encompass leadership development, team health, organizational effectiveness, strategic planning, and decision-making coupled with project management. The Consolution Project, already leveraging Microsoft 365 and Teams, aimed to enhance participant tracking through Dynamics 365 integration. Their goals included implementing Dynamics 365 for participant management, donor list segmentation, and automating onboarding processes for increased operational efficiency.

Solutions

TechHouse responded by setting up Dynamics 365 Sales, seamlessly importing their contacts. Consolution's tech specialist received extensive training on utilizing Dynamics 365 and Power Apps to build an intuitive interface. Additionally, TechHouse configured Power Automate, enabling swift onboarding of new partners and ultimately broadening the Consolution Project's outreach.

Challenges

- Track and manage contacts
- Segment lists
- Automate processes
- Scale operations efficiently

Benefits

- Comprehensive participant monitoring for improved engagement
- Targeted donor outreach and enhanced relationship-building
- Streamlined onboarding process for increased service capacity