

## BDO IT SOLUTIONS

# CASE STUDY—SCIENTISTS IN SCHOOL



### The organization

Scientists in School is a Canadian charity dedicated to helping students become "scientists in their school," catalyzing lifelong interest in STEM (science, technology, engineering and math), and environmental stewardship and engineering, to potentially encourage future careers in science-related fields. Founded in 1989, Scientists in School brings real-world science to classrooms that often lack the time, resources and expertise to conduct hands-on investigative experiments. Demand for its half-day workshops was growing, and implementing Microsoft CRM Online made it exponentially easier to track activity and expand potential.



### The challenge

Scientists in School have a core staff of about 40 people, and they work with over 400 geographically dispersed presenters throughout six regions. Offering over 60 workshop topics means they have to maintain quality control for an abundance of presenter-by-topic combinations. It is very complex to manage, and they were tracking their workshops and presenters by pen and paper—and Excel—for years. To better sustain a high-quality program and maintain quality control, Scientists in School needed to make a change and decided to make the move to Microsoft Dynamics CRM Online.

### Why Microsoft Dynamics CRM?

Scientists in School selected BDO IT Solutions to implement the new system based on its extensive experience in Project Management and operational change, alongside their proven skills in productivity

and efficiency improvements. BDO IT Solutions suggested Microsoft Dynamics CRM Online to address Scientists in School's needs for the following reasons:

#### Integration with Existing Microsoft Products

- Scientists in School used Microsoft Outlook and Microsoft Dynamics GP extensively for years, and needed a CRM solution that would tightly integrate with these applications.
- Microsoft Dynamics CRM exports to Excel for additional analysis and processing.
- Tight integration with Dynamics GP allows users to easily log into their own portal to see workshop details, and to log expenses and claim presenter fees.

#### Ease of Use & Mobility

- With a standard Microsoft interface, Dynamics CRM is an easy system to adopt and learn.
- Power users at Scientists in School were able to learn the system and train new employees with only limited assistance from BDO IT Solutions.
- Ability to log in from anywhere on any device, and access the presenter workshop schedule and link directly to Bing Maps for easy access to directions for each workshop location.

### SECTOR

Not-for-Profit & Education

### ABOUT BDO

BDO is one of the nation's leading providers of assurance, accounting, tax, and advisory services. With strengths firmly rooted in the communities we serve, our professionals deliver highly individualized services informed by deep industry knowledge and nearly 100 years of experience working in local markets throughout the country. And with resources across Canada and around the world, BDO provides seamless and consistent cross-border services to clients with international needs.

BDO is an international network of public accounting, tax, and advisory firms that performs professional services under the name of BDO. With nearly 65,000 people working out of more than 1,400 offices in over 150 countries, the network generates worldwide revenue of \$7.30 billion.



### Vendor Stability

- Scientists in School did not have their own IT department, so they chose to partner with BDO IT Solutions to help map out the path to improve operations, move away from an outdated and unsupported paper system, and move onto a custom Web portal on a Microsoft platform.
- Microsoft's non-profit pricing made the software-as-a-service (SaaS) more affordable.
- By using proven technology, the Scientists in School will be able to maximize the return on its investment and continue to build on its existing Microsoft technology platform.

### The results

"Our goal with CRM was to make it easier and less frustrating to share information with our presenters. With the help of BDO IT Solutions we implemented Microsoft Dynamics CRM Online and we accomplished our goal. Dynamics CRM Online makes it easier to track activity and expand our potential. Before, we were unable to track whether a presenter was paid for their work. Now Dynamics CRM does all that for us. The whole process has become seamless," says Lynn Boyd, Director of Programs with Scientists in School. The project went smoothly and allowed for the following:

- Streamlined operations and reduced manual spreadsheet tracking.
- Added mobile functionality for users to access and update data remotely.
- Increased ability to track funding requests and payments across the organization in a single system.

Scientists in School is now better able to manage its rapid growth and attract and retain top presenters, which helps them to secure donations that subsidize workshops for schools. "Hands-down, BDO IT Solutions was the best choice and one of the best partners we could have ever asked for. We couldn't have got here otherwise," says Cindy Adams, Executive Director with Scientists in School, who describes their new system as state of the art. "A major-sized company would be enthusiastic about our system. We have what we need now, and with Microsoft technology as a platform, we're set up to deepen and broaden our impact in the future."

BDO IT Solutions helps organizations align technology to their overall business strategies using Microsoft technology. Harnessing the power of on-premise, hybrid, and cloud solutions, BDO IT Solutions enables our clients to streamline their business processes and improve overall operational efficiency. This group of experienced professionals provides consulting, implementation, training, and support for a variety of solutions, including Microsoft Dynamics AX, GP, NAV, CRM, Office 365, SharePoint, and Power BI as well as Business Intelligence and Corporate Performance Management.

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