

NFP Service Delivery and Client Management Solution

Customise services and reduce admin tasks through Microsoft Dynamics 365



What is NFP Service Delivery and Client Management Solution?

The NFP Service Delivery and Client Management Solution is a solution built with clients and front-line workers in mind. It provides a comprehensive case management framework that is compliant with multiple funder data collection, validation and reporting requirements.

Why Barhead's NFP Service Delivery and Client Management Solution?

The NFP Service Delivery and Client Management Solution is part of Barhead's Not-for-Profit program that aims to provide personalised and customised services funded by local, state and federal government institutions. It is a single solution which includes highly configurable forms and business rules that will comply with the organisation, or funder's data collection and validation requirements.

Unique Value Proposition



Comprehensive End-to-End Service Delivery Framework

End-to-end client-centric case management delivery which includes multi-channel interactions.



Operational and Management Reporting

Proactive frontline worker and service manager dashboards to drive actions and review worker's service capacity.



Built on Microsoft Environment

Configurable and scalable cloud platform based on Microsoft Dynamics 365. Optimal office integration and collaboration with Outlook, Word, Excel and Teams.

Included Activities:



Functional Workshops

Review of existing functionality and mapping to Barhead Service Delivery Framework



Technical and Integration Workshops

Review of upstream and downstream systems



Reporting Workshops

Review of operational and management reports and dashboards



Data Migration Workshops

Plan for migrating existing clients' and case records

Three-Week Gap Analysis Workshops

Typical Scenarios

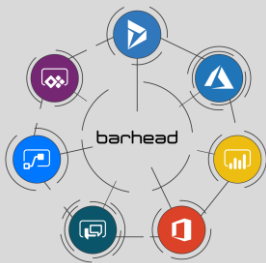
- Improve business processes and increase client engagement through automation and data-driven insights.
- Highly extensible and scalable CRM.
- Suited for Microsoft Office 365 or Dynamics 365 users, and organisations that currently track clients and cases in Microsoft Excel or CareLink.
- Migrate from an on-premise environment to a cloud platform.

Business Outcomes

- ✓ Fit or gap analysis report.
- ✓ High-level design with recommended business processes, solution architecture, integration and data migration plan.
- ✓ High-level implementation project plan.

Pricing

The three-week Fit or Gap Analysis workshops are delivered for a fixed fee of AUD 65,000. Client specific requests for add-on services is on ad-hoc basis.



The NFP team at Barhead has in-depth knowledge of the sector and Microsoft technologies. Barhead has worked with NFP organisations to deliver Microsoft-based solutions that drive strong constituent engagement, improve productivity, strengthen efficiency and drive compliance.

NFP Enablement Services

Service Delivery	Capture client enquiries such as initial assessments, case notes and funder reporting.
Membership Management	Capture and review membership applications and renewals.
Fundraising	Manage supporter relationship.
Marketing and Event Management	Plan events and design journeys and segments for effective content targeting.
Grant Management	Plan, create and manage projects and related activities such as time entries and expense claims.
Volunteer Management	Promote and manage volunteering opportunities and applications.

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| ✓ Gold Application Development | ✓ Gold Data Analysis |
| ✓ Gold Application Integration | ✓ Gold Datacenter |
| ✓ Gold Cloud Business Applications | ✓ Gold Data Platform |
| ✓ Gold Cloud Platform | ✓ Gold DevOps |
| ✓ Gold Cloud Productivity | ✓ Gold Enterprise Resource Planning |