Enhancing Operational Efficiency for Not-for-Profit Organizations

Empowering Business through Enterprise Solutions

Contents

01. Breaking Myths

Common culture perceives not-for-profit organizations to be non commercial, non tech savvy entities that are so drawn by their cause that they see nothing else. This, however, is far from the truth on how not-for-profit organizations such as business associations, educational institutions and funded organizations work. Whilst their core-competencies are indeed different from corporate business houses, many of them are hi-tech, service minded, and quality conscious companies that operate similar to their commercial counterparts. It is not surprising then, that, cost management and effective resource utilization is one of the most critical success factors for these organizations; due to the high need of demonstrating traceability and transparency throughout their operations lifecycle.

In the 21st century, maximizing profits will require more than solely focusing on the financial aspects of business. Social, environmental, and financial performance will be necessary for the successful company to maximize opportunities. Companies that understand and manage their triple bottom line will be most profitable.

- World Resources Institute

"There are things known and there are things unknown, and in between are the doors of Perception."

- Aldous Huxley

02. Why ERP?

Research shows that this sector can benefit tremendously from the right use of technology. Organizations that consider themselves "struggling" with technology adoption spend nearly twice their operating budget on technology compared to the sector's average[1]. An integrated solution for finance, contact, payroll, procurement, events (project), quality and service management aids organizations to optimize and automate their routine tasks, so as to save funds, resources, time and energy for higher valued operations that contribute directly to their multiple bottom lines. Like every industry, this sector too has its unique requirements and pain-areas that need to be addressed in a systematic manner. Some of the common objectives to be met are:

- Extremely high need for transparency and accountability
- Cost effectiveness - A single system with lower total cost of ownership
- Support for multiple location operations and in some cases global operations
- System generated compliance reports
- CRM features for member and donor management
- Project and program accounting and tracking
- Data security
- Clear traceability of resources utilized for maximizing end user benefits
- Harnessing latest advances in key technologies such as social, mobile, predictive analytics, cloud computing and big data.

1: Non-profit Technology Enterprise Network Staffing and Investments Report, 2014

03. Why Microsoft Dynamics AX?

One of the most widely used ERP products for the not-for-profit sector, Microsoft Dynamics AX has in-built capabilities that are needed by many of today's dynamic, forward thinking, social enterprises. Starting from charity management, cultural campaigning and contact collection, to advanced aspects like fund accounting, budgeting, project tracking and reporting, this unified software has an integrated set of features that can be used for streamlining company operations.

03.
a. Modules

GENERAL LEDGER ACCOUNTING	ACCOUNTS RECEIVABLE	ACCOUNTS PAYABLE	CASH AND BANK MANAGEMENT
BUDGETING	FIXED ASSETS	PROCUREMENT	PROJECT MANAGEMENT AND ACCOUNTING
REPORTING	MEMBERSHIP AND SUBSCRIPTION	INVENTORY AND WAREHOUSE MANAGEMENT	TRAVEL AND EXPENSE

Significant modules for this industry are:

Member Management

- Multi-tiered membership models for individuals, chapters and companies
- Management of flexible fees and subscription charges
- Maintain financial records such as the yearly Gross Sales Turnover

Contact Management

- Demographic information such as contacts and addresses
- Linkage of individuals to organizations with unique membership id
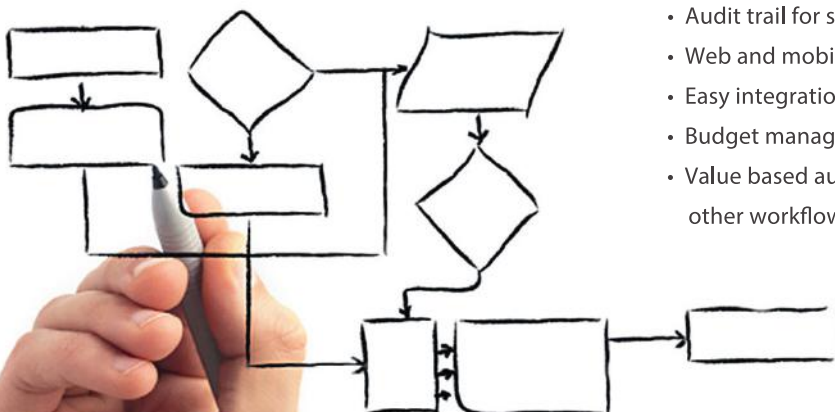- High level of security for personal data

Finance and Tax Management

- Subscription amount based calculation of voting rights
- Auto invoice generation and bulk printing
- Auto posting to service tax registers
- Statutory accounting and reporting

03.
b. Features

- Single source of truth with a centralized repository
- Multi location, multi-currency support
- Intuitive user friendly UI
- Customized features for individual needs
- Backup mechanisms, access controls, data restrictions
- Drill-down and big-picture reports
- Audit trail for showing responsibility of approvals
- Web and mobile accessible employee self service tools
- Easy integration with existing systems
- Budget management - planning, tracking and forecasting
- Value based authorization of purchase requisitions and other workflow documents
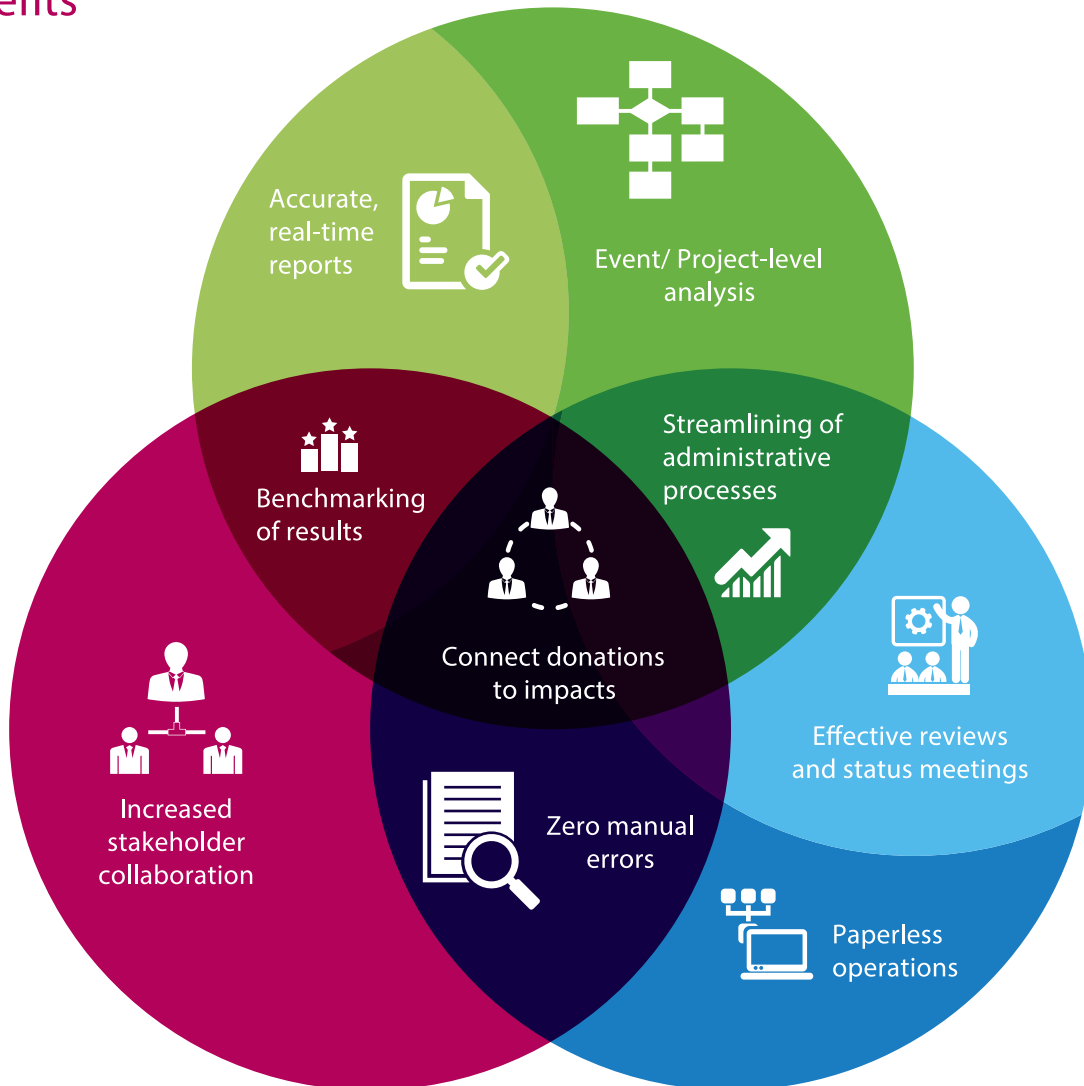
03.
c. Integrations

- Import of membership and event master from 3rd party web based software
- Export of gross sales turnover master, membership outstanding, and event wise revenue and expense details to 3rd party web based software
- Microsoft Excel add-in for uploading GST master data into AX

03.
d. Benefits

Accurate, real-time reports

Event/ Project-level analysis

Streamlining of administrative processes

Benchmarking of results

Connect donations to impacts

Increased stakeholder collaboration

Zero manual errors

Effective reviews and status meetings

Paperless operations

04. Case Studies

Major Non-Profit Association of Indian Businesses Goes Live with Microsoft Dynamics AX 2012

- The client is a not-for-profit, industry-led and industry-managed organization which also serves as a liaison between the government and industry. It has 8000 direct member organizations, 66 offices, and 312 institutional partnerships in 106 countries.

- The client was facing efficiency pressures in keeping up with the exponential growth in member organizations each year. In addition to member subscriptions, streamlining finance operations across all of the branches was proving to be an overhead with the continuous increase in volumes.

- The solution implemented by Godrej Infotech Limited included integrated Membership Tracker, Financial Consolidator, Audit Aligner and Management Reporter modules. Key stakeholders can now make strategic business decisions using consolidated and detailed financial statements.

- The client is now able to provide better service to its member organizations. Financial productivity has increased due to the integrated finance module. There has been 40% reduction in paperwork and 20% reduction in physical storage needs.

Companies with their eye on their 'triple-bottom-line' outperform their less fastidious peers on the stock market

- The Economist

When asked on what is the most important reason that influences his decision to work with GITL, Financial Controller for the organization cites 'Personalized Services' and 'Faster Turnaround Time on Support Activities' as the key differentiating factor.

India's Leading Machine Tool Manufacturers' Association Improves Operational Parameters with Microsoft Dynamics AX 2012

- The client has multiple member organizations across the Indian Machine Tool Manufacturing Industry. It acts as a single point of contact and supports the industry for increasing technology, quality and productivity aspects. It is also reputed for running India's first "LEED - Certified" green exhibition and conference facility.

- The client required integrated and scalable operations across central and regional offices, along with financial consolidation, efficient billing and collection processes and standardization of the purchase cycle.

- To resolve the client's issues, Microsoft Dynamics AX 2012 was deployed in a centralized server environment, with integration to as many as 6 external billing systems.

- The client benefited significantly in terms of time effectiveness, reducing repetitive processes and expediting processes which otherwise took a long time to finish.

A Global Organization Committed to Wild Life and Nature Conservation Integrates Multi-Location Operations with Microsoft Dynamics AX

• The client is the Indian wing of an international organization that is on a mission of environmental protection. It is the largest organization engaged in wildlife and nature conservation in the country.

• Being a multi-country organization, the client needed an interface between the MD AX Accounting and Management System in India, and a separate validation software that was managed at the organization's headquarters in Switzerland.

• GITL's research and development team built a solution that directly validates transactions from AX without any re-entry in the validation software.

• The customer gave our consultants a top ten rating for their technical knowledge, problem solving, communication skills and product knowledge.

Why Godrej Infotech Limited?

Godrej Infotech Limited, till date, has successfully worked with numerous renowned not-for-profit businesses for the implementation, deployment, migration and support of Microsoft Dynamics AX. The AX product is a best fit product for this kind of industry, with multiple out-of-the-box features that bring the much needed efficiency and ease into strategic and day-to-day operations. The product now easily integrates with other Microsoft Office professional tools such as Office 365 and Power BI to bring the best of all Microsoft technologies under a single unified platform. Microsoft Dynamics AX also interfaces with mobile applications, enabling users on the field to access and record key information in real time.

At Godrej Infotech Limited, we have a large pool of AX certified technical and functional consultants that have in-depth knowledge and experience in working with global, multi-business industries. Our relationship with Microsoft Dynamics was initiated in 2003, which has since then resulted in one of the most successful business lines for us, as we collaborate on building profitable and innovative solutions for our clients. We have executed several full life cycle implementation, migration, global rollout and support engagements for organizations across India, Europe, APAC, USA and Middle East using Microsoft's proven Sure-Step methodology. More recently, we have also started an Enterprise Mobility practice for providing integrated mobile applications to our customers, who benefit significantly from such anytime, anyplace flexibility features.

We feel honored to have received numerous awards and acknowledgements from our partners - Microsoft, Infor and LS Retail.
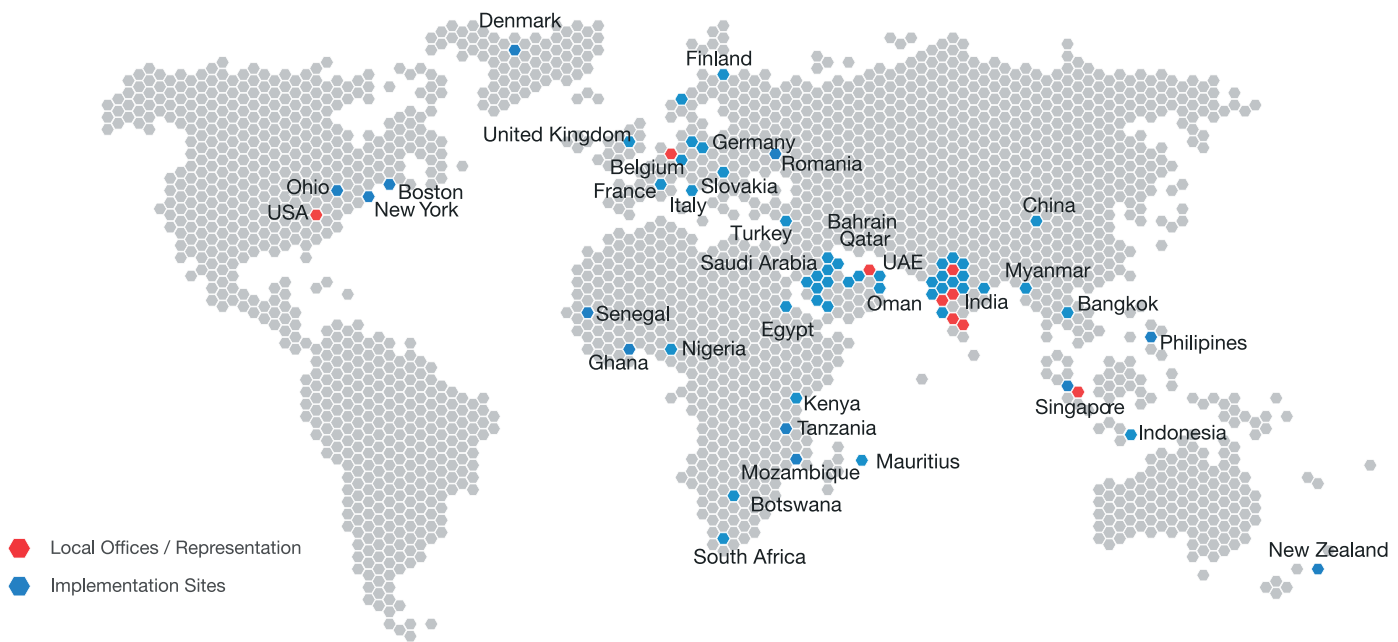
• Member of Inner Circle and President's Club for Microsoft Dynamics

• Gold Partner, Microsoft Dynamics, ERP and CRM

• INFOR Associate Channel Partner, 'Best Performing Partner' for Asia - Pacific region

• Diamond Partner for LS Retail

A quality conscious organization, we are certified for ISO 9001:2015 and SEI CMM Level 4. We also follow the EFQM 2020 Business Excellence Framework for achieving sustainable, flexible and progressive growth in all of our business lines.

Our customer help desk and state-of-the-art, in-house data center are operational 24*7 to ensure smooth running systems and workflows for all of our global user community.

Global Presence

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United Kingdom
Germany
Belgium
Romania
France
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Italy
Ohio
Boston
New York
USA
Turkey
Bahrain
Qatar
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UAE
Myanmar
Oman
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