

## Employee portal significantly lowers operational costs for religious body

Senetas was engaged by a major Church-based organisation with Dioceses and Parishes throughout Australia, to implement a technology framework to enable a more productive collaborative work environment. This targeted increases in employee productivity while lowering other related expenses without adversely affecting the quality of community services delivered.

The selection of the Microsoft Business Productivity tools, namely SQL Server 2008, SharePoint 2010, Office 2010, System Center Essentials 2010 and Dynamics CRM 4.0 product suite and the ability to use the CRM software as a true xRM framework has enabled the client to expand beyond the typical Portal/CRM solution into areas such as:

- Property Management - the church holds a very large number of geographically dispersed building assets as well as artwork and artefacts in its church buildings.
- Resource Management – what resources (priests, locums etc.) have what skills, qualifications and clearances, where are they located.
- Training/Professional Standards Registry – collation of information regarding staff training, certifications, clearances (police checks, working with children check etc.), restrictions.
- National insurance administration portal – repository of all insurances, integrated workflow packages (i.e. building is sold/acquired etc.).
- Debtor billing – all parishes pay yearly assessment levy to the diocese. The portal manages these levies. Re-allocation of direct payroll costs to parishes.
- Channel partner (parishes) HR function – xRM serves as the portal to administer superannuation, sickness and accident insurance administration, long service leave etc.
- Production of yearbook – automated process now takes a couple of days versus 2 weeks full time effort.
- Parish Portal – Extranet for all parishes to access Diocesan information including parish information, invoices, statements, worship data input, congregation analysis, benchmarking against other parishes and external data sources.
- Public web site – easy to use and maintain content management
- Diocesan Intranet – single source of access to all applications and content
- Parish Internet – web framework that is made available to parishes to build their own SharePoint web site free of charge and hosted by the diocese
- Committee web portal – extranet for committee members to publish meeting papers, documents, manage and record meeting attendees, manage committee members – includes a number of workflows and alerts

The native integration of ERP (GP 10), SharePoint 2010 and Dynamics CRM 4.0 enabled the Diocese to create a true portal for its entire internal staff, channel staff (parishes) and affiliated organisations as well as the general public and provided access to its core functions and documents.

- The streamlining of the systems has reduced the error rate between departments by 25%.
- The integration of all systems allowed for the re-allocation of the equivalent of one full time employee to other duties in the insurance business unit.
- The implementation of the portal for committee members has resulted in a monthly saving of \$1200 per committee in printing, mailing and courier costs. Currently seven committees are using the portal (7 x \$1200 = savings of \$8400 per month).

The client's overall transformation business strategy objectives have been achieved and significantly increased productivity and result in better cost efficiency. Exceptional ROI was achieved in the following ways:

- Contact management - Easy and timely access to a single source of contacts from a portal – alleviated the need to keep multiple internal and external databases up to date, thus increasing staff productivity
- Customer analytics - Ability to record, manage and analyse parish performance. And congregation trending through captured worship attendance
- Marketing – Ability for targeted outreach programs (in a corporate world this would read marketing campaigns) and the ability to monitor its impact and penetration rate
- Financial profit impact – Better property management has led to better utilisation of church assets through streamlined property maintenance management, lease renewals, hire and lease management of assets
- Revenue financial management - Evaluation of revenue margins, product margins, customer value, revenue responses to product changes, product pricing performance, etc. – resulted in increase of financial products net profit
- Distribution channel management - Identification of channel costs to serve, channel partner revenue/margin/cost to serve metrics, evaluation of which product to which customer segments through what channels, etc. – resulted in ability to bring more channels (parishes) on board and taking up broader service offering
- Business operations -Integrated data management/contact management streamlined operations and business processes– resulting in much less duplication of records, workflows, data, tasks etc. – resulted in increased employee productivity
- Going green – On-line access to the most up to date information and documentation has cut down printing and mailing expenses. The committee portal alone represents a cost saving of \$8,400 per month
- Yearbook production – automated process has reduced yearbook production time from 2 weeks (for one full time employee) to 2 days (for one full time employee)
- Significantly lower IT operational costs – standardisation of technology and licensing efficiencies
- Ability to leverage the solution across related organisations and bodies - the solution platform and design are replicable making the client's investment produce higher than normal returns.



Importantly, the collaboration platform and document management system help ensure the organisation and the Church of regulatory compliance and, in turn, reduced legal and reputation exposure.

The Senetas Employee Portal solution is unique in the way it brings people, operations, applications, marketing, PR and organisations together leveraging the whole of the Microsoft platform whilst dramatically increasing staff productivity and reducing operational costs for the organisation.

The implemented solution addresses the specific needs of a vertical industry segment (religious organisations) and is applicable to a large number of organisations. The solution can be 'packaged' and re-deployed within the market segment with minimal customisation. The strength of the solution lies within the use of the whole Microsoft platform – using product sets as building blocks to create a unique, integrated solution that encompasses all of the applications used by employees during the course of their working day.

Senetas is a trusted advisor at three of the largest religious denominations in Victoria and is engaged in multiple projects within these organisations. The 'religious bodies' sector is an important market segment for Senetas highlighted in our consulting practice business strategy.

Prior to the implementation of the Employee Portal the client ran a number of best-of-breed as well as proprietary systems that required specific user expertise as well as IT administration knowledge. The maintenance and upkeep of the applications was extremely costly – multiple vendor service level agreements with monthly maintenance fees attached were the norm. Over the last couple of years it became increasingly difficult for the client to update its system as they weren't well integrated with one another and not compatible. A couple of the vendors ceased development on their products. The business users became more and more frustrated by being stuck with old versions of Windows XP and Office (2000 & 2003) and not being able to make use of the new tools and features available in newer version - this impacted on their productivity.

Diocesan staff had to sign in to a number of different systems and applications during the course of the day to complete their allocated work tasks. There was a duplication of slightly varying record and contact management databases across different business units with additional duplicate databases being maintained at parishes and/or other associated groups and organisations.

A large number of business processes were manual and instigated via a phone call from a parish/associated organisation or a staff member from a different business unit within the Diocese. A number of manual processes were triggered and the requested information was, in the best case, provided via email or more often than not via Australia Post.

Senetas recognised the cost benefit of streamlining the diocesan applications to a single platform with minimal maintenance and licensing costs whilst delivering a multitude of functionality – this is what makes this solution unique!

Senetas recognised the opportunity to leverage the whole of the Microsoft platform and began working within a number of business units within the organisation. The first task was to determine each business units pain points and then to paint a vision for a ‘unified’ future. Over the months Senetas run a number of “Realising Platform Value” workshops with key stakeholders. An IT roadmap was created and aligned with the business strategy – then a business case was created and successfully passed by the archbishop and the strategic leadership team.

From there onwards a number of projects followed using SQL2008, SharePoint 2010, GP 10, CRM 4.0:

1. Diocese Banking Arm Web Site and Online Statement Facility
2. Committee Web Sites
3. Parish Internet
4. Diocesan public web site
5. Intranet
6. Extranet (Parish Portal) xRM
7. Office Upgrade

The other unique aspect of the solution is that it caters for all of the complexities of this particular religious organisation, however is built in a way that will allow replication (and re-sale) of the solution to other Dioceses of the same denomination nationwide.

The Diocese is currently considering creating a new business unit – IT Services. They would on-sell and manage the above infrastructure for other Dioceses and/or Parishes within the same denomination and/or may expand their service offering to other religious bodies over time.