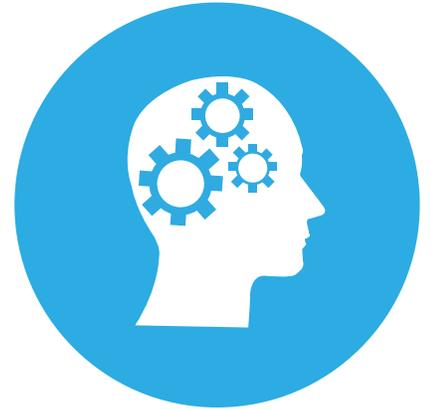


COUCH & ASSOCIATES

IMAGINE CANADA A CASE STUDY



Organization Realizes Payoffs Of Automation Based On New Approach To CRM & Accounting System Integration

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ORGANIZATION REALIZES PAYOFFS OF AUTOMATION BASED
ON NEW APPROACH TO CRM & ACCOUNTING SYSTEM INTEGRATION

SUMMARY IMAGINE CANADA

A national organization serving charities and non-profits realizes time and cost savings of automation after Salesforce.com CRM system is effectively integrated to its accounting system.



ABOUT COUCH & ASSOCIATES

Couch & Associates Inc. is a professional services marketing organization that specializes in adding value to marketing processes through automation, effectiveness and sales enablement. Couch & Associates consultancy consists of lead consultants, account & project managers that drive initiatives to their 200+ clients ranging from SMB to Fortune 500. The Couch & Associates design and technical teams add value through their knowledge of best practices and experience with marketing technologies and surrounding infrastructures. The team is certified with a variety of software platforms including Eloqua, Salesforce, Netsuite, SLX and Microsoft Dynamics.

CUSTOMER OVERVIEW IMAGINE CANADA

Imagine Canada is a national charitable organization that supports and strengthens Canadian charities and nonprofits. The organization works on numerous issues and challenges facing the charitable and nonprofit sector, including funding, human resources, volunteerism, governance, accountability and research. Serving as a collective voice for the sector, Imagine Canada provides forums for mobilization, knowledge sharing and innovation.

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BUSINESS CHALLENGE

Imagine Canada helps to drive collaboration among its constituents, but the organization struggled with its own ability to share data and information internally. Imagine Canada had used several different CRM and accounting solutions, but after struggling to integrate data and create reports between the tools, the organization was still not realizing the kinds of productivity gains they expected.

“Lack of information sharing capabilities and data reliability were major issues. We had no connection between our CRM and accounting software. We had to do manual transactions at the end of every month to bring the CRM information over to the accounting system. There was a lot of inefficiency.”

— Anna-Marie Christian, Director of Finance, Imagine Canada

**Need
connection**

**CRM &
Accounting
Software**

Even after switching to another name brand CRM solution, Imagine Canada still struggled with integration and reporting issues.

“Users could not generate their own reports with the new CRM. We always had to go back to the consultants. Our people began to think the data was incorrect, so they started keeping their own spreadsheets. It was really difficult to find anything.”

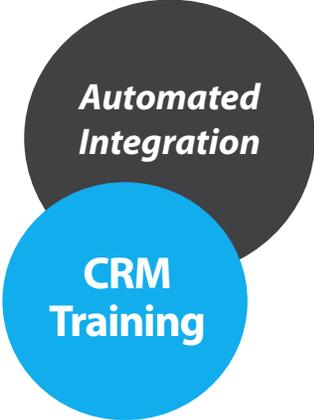
— Anna-Marie Christian, Director of Finance, Imagine Canada

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SOLUTION

Imagine Canada began seeking an outside expert that specialized in platform integration and could provide an unbiased perspective on which CRM system would fit the organization's unique needs. Based on the analysis and insights provided, Imagine Canada selected Couch & Associates from a field of solution providers to perform integration and training on a new CRM system rollout.



*Automated
Integration*

**CRM
Training**

Imagine Canada tasked Couch & Associates with the following:

- Integrate a new cloud-based CRM platform with preexisting on-premise Microsoft Dynamics GP accounting software using a custom-built interface, giving visibility to users of accounting and CRM functionality, respectively.
- Facilitate staff adoption and usage through comprehensive training;
- Enable certain communications (i.e., mass emailing) through the CRM. The automation of inefficient manual campaign reporting.

RESULTS

One of the first steps taken by Couch & Associates was to unplug the legacy CRM and recommend that Imagine Canada adopt the Salesforce.com (SFDC) platform. While this necessitated creation of a custom interface between an on-premise Microsoft Dynamics GP system and cloud-based SFDC, Couch & Associates executed flawlessly.

“The automated integration between Salesforce.com and Microsoft Dynamics GP is totally amazing. I never dreamed it could be this good.”

— Anna-Marie Christian, Director of Finance, Imagine Canada

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RESULTS

"We don't have to do any manual transactions during the month or month end. We now utilize [the full functionality] of our accounting system, and it makes it easier to be audited from financial statement when our auditors come in," says Christian.

"It's just cleaner. Everybody can see a history of all transactions. And the people creating the opportunities – in essence, those selling our services – are the ones entering that data, so they have confidence that we're billing the right prices to the right people. It has allowed us to give more control over the people who are selling, rather than everything having to sit in finance."

— Anna-Marie Christian, Director of Finance, Imagine Canada

With data from the Microsoft Dynamics GP accounting system now programmed to auto-populate SFDC fields, Imagine Canada is gearing up to realize the cost and time savings of automation.

SAVE
at least

16 hrs
per month

"We're probably going to save at least 16 hours per month through that change alone. We've got everybody in the organization on the system, and I would say 95% are using it regularly. They're using it for their data needs, we're running reports out of it, and people have gotten away from the Excel spreadsheets. There's a level of trust that the data is correct in Salesforce.com. So we've been able to reconcile confidently."

— Anna-Marie Christian, Director of Finance, Imagine Canada

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RESULTS

Adding a training component to the Couch & Associates rollout has also had a transforming effect on Imagine Canada's platform adoption and related efficiencies. Noting that previous CRMs had no group training, Christian says, "This time everyone got hands-on training from Couch & Associates, and it really worked out well." The training had a galvanizing effect on users, and also disseminated an understanding of how to extract data, by user and by role.

"The training was customized to what we needed. We broke our people up into different groups based on their needs, and we had a learning group where everyone was able to do transactions. The pace was good. It really catered to the different groups in our organization, because different groups have different needs. I did not get any negative feedback about the training. Not a word."

— Anna-Marie Christian, Director of Finance, Imagine Canada

Built on the pillars of data reliability, system integration, and user-focused implementation, Imagine Canada is seeing past problems replaced by new efficiencies. "Removing the spreadsheets, consolidating that data into Salesforce, and the confidence that our information is correct has cut back on staff hours because people don't have to spend huge amounts of time looking for and validating data," says Christian.

Other benefits of the Couch & Associates implementation include:

- Wasteful and worrisome data duplication has been eliminated
- Templated emails are now being sent from the CRM suite
- Orders and invoicing have been dramatically streamlined

Confidence

Efficiency