



IM△GINE  
CANADA

# Case Study

How Couch & Associates helped Imagine Canada realize the benefits of automation based on a new approach to CRM & accounting system integration

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## About 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.

## Overview

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 levels of productivity gains they expected.

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

## Outcomes:

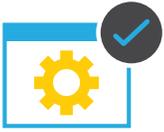
1. 30 hours of manual work eliminated weekly
2. Accurate, reliable data distributed to all relevant teams

## Key Considerations

1. Eliminate the need to do manual transactions by syncing information between Imagine Canada's CRM and accounting software.
2. Enable certain communications through the Salesforce.com CRM and automate campaign reporting.
3. Facilitate staff adoption and usage.

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# Approach



## Integrations

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- Unplug the legacy CRM and recommend that Imagine Canada adopt the Salesforce.com platform.
- Build a custom interface to integrate the CRM and on-premises Microsoft Dynamics GP system, giving visibility to users of accounting and CRM functionality.



## Automations

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- Enable mass emailing and other communications through the CRM.
- Automate inefficient manual campaign reporting to improve data accuracy and eliminate the hours spent compiling data.



## User Adoption

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- Provide comprehensive training to facilitate staff adoption and usage.

# Results



1. Accurate, reliable data that is well presented and easily accessed by all necessary departments.



2. Remove 30 hours of weekly manual work through automating standard processes.



3. Significant cost savings resulting from eliminating common mistakes.



4. Enhanced user experience and system understanding.



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*



To achieve similar results for your business visit <http://couch.associates> and speak to one of our consultants today.