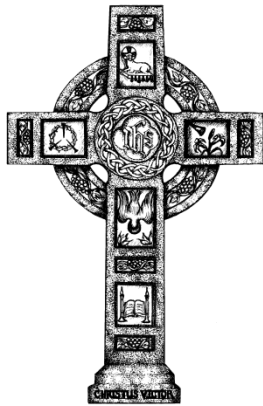




## Microsoft Dynamics CRM Customer Solution Case Study



### Overview

**Location:** Winter Park, FL

**Industry:** Religious organization

#### The Challenge

St. Paul's required a way to keep track of its members, communicate with them easily and run specific membership reports by request.

#### The Solution

Working with Microsoft Dynamics CRM, Outlook and QuickBooks, St. Paul's can easily input and track member activity and produce data-specific reports instantaneously.

#### The Results

Now St. Paul's can easily email specific member groups when volunteers or donations are sought, and the church can easily track membership and communicate activities of interest.

## IBG Helps St. Paul's Keep Its Members Engaged... and the Donations Coming

Their organization isn't on the Forbes 500 list and doesn't have to publish an annual report or complete a Schedule M-3, but St. Paul's Presbyterian Church in Winter Park, Florida, still had the need for effective CRM. "We have members instead of customers," explains Judy Stephan, administrative assistant and assistant to the pastor.

Stephan shares the software with three other office mates. "Previously, we were using ConnectionPower, a Web-based program [specifically designed for church management]," she explains. "But it didn't allow for custom reports and we couldn't search by groups."

Sometimes Stephan is required to send out a call for volunteers or donations, but mostly she is busy communicating the church's activities and wishing members a happy birthday.

She says she and her co-workers did originally have concerns about losing data as they made the switch to CRM, but now that fear has long subsided. "It's been great getting the reports we need immediately," she says. "We can search any conceivable field and export the information into an Excel spreadsheet. It's capable of a lot."

As for Integrated Business Group's involvement, Stephan says they were very helpful and even willing to come in after hours. All in all, the transition took just over one month.

In the future, Stephan says she plans to upload member photos to the database, too, so she can create an impressive directory. And she wants to replace Constant Contact with CRM so members can be made aware of upcoming events via newsletters.



Successful Solutions. Delivered.

**“It’s been great getting the reports we need immediately.”**

—Judy Stephan, Administrative Assistant  
St. Paul’s Presbyterian Church

### More Information

Integrated Business Group, a Microsoft partner, has achieved a Silver Enterprise Resource Planning Competency & Learning Competency, a worldwide recognition for commitment to providing comprehensive training solutions for Microsoft technologies—strengthening IBG’s standing in the marketplace and enabling IBG to reach more customers.

For more information about Integrated Business Group products and services, call (407) 677-0370 or visit the Web site at [www.ibgnet.com](http://www.ibgnet.com)

For more information about St. Paul’s Presbyterian Church, call (407) 647-7774 or visit the Web site at [www.stpaulpca.org/index.html](http://www.stpaulpca.org/index.html)

### Measures of success:

- Information can be quickly and easily accessed, even from remote locations via the Web
- Member information is more effectively compiled and searchable
- Reports can be obtained in a matter of minutes



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