



Intellitec Solutions

Supporting the Mission for Nearly 20 Years: The Arc of Delaware, Intellitec Solutions & Microsoft Dynamics 365 CRM

The Arc of Delaware is a nonprofit organization that provides advocacy, housing, employment, and community outreach services for individuals with intellectual and developmental disabilities across Delaware.

The organization manages 82 residential homes serving 319 individuals across the state while supporting people in achieving greater independence.

When Information Is Everywhere

With a small team, The Arc needed an efficient way to manage decades of client, property, grant, and donor information. Like most non-profit organizations, staff needed quick access to reliable information so knowledge could be shared across the organization, especially as responsibilities changed.

Microsoft Dynamics 365 CRM had been part of The Arc's operations for more than two decades, becoming a central repository for information across the organization. As Executive Director Susannah Eaton-Ryan explains, "Everything we do administratively, we track in there." With so much critical

information in the system, The Arc worked with Intellitec Solutions to continue making that information more accessible and useful as the organization & needs changed.

Housing Operations at Scale

Managing 82 residential homes once meant relying on paper records for maintenance, contracts, invoices, and other critical property information. By moving these records into Microsoft Dynamics 365 CRM, The Arc significantly reduced its reliance on paper while streamlining work order management, improving communication, and making information easier to find.

Daniel Jackson, Employment and Outreach Specialist at The Arc, explains, "With Microsoft CRM, we keep everything documented and easily searchable. Having all of that there as a history is really helpful when you own houses. It's like a history of everything we've done to the house."

Elaine Raign, the Office and HR Director, agrees, "For me, the biggest thing was going from tons of paper to everything online. Not having to go through files looking for things."



"It would take me two weeks to prepare the report at the end of the grant, and Intellitec helped me manage how to pull that information and organize it [in two days]."

Susannah Eaton-Ryan
Executive Director



More than eliminating paper, Microsoft Dynamics 365 CRM fully supports the housing team's daily operations. Jackson explains, "Our housing department can sort through everything and assign tasks accordingly. We have a team of four maintenance technicians and Microsoft CRM keeps everything nice and organized. We can print from there, email from there, and get back to people so they know they've been heard, that they've sent it in and we've received it, which helps prevent doubling up."

Supporting Consistent Client Services

The long-term individual client support The Arc provides requires accurate, detailed documentation. Microsoft Dynamics 365 CRM centralizes years of client interactions, employment support activities, and case history, giving staff immediate access to the information they need to provide consistent

care, as well as easily handle state reporting requirements.

When it comes to employment, Jackson says, "We're required to document what happens when we visit with a client to show that, yes, these services are still needed because this all runs through the state. We keep really detailed documentation on our visits. We do technically have to do it twice because our system and the state system don't talk to each other, but the state system is not very user-friendly, and there's not much of a history feature."

Keeping the history documented internally creates a record that extends beyond compliance. If responsibilities change or new employees join the organization, they can quickly understand a client's history without relying on paper files or memory. "Let's just say that if I left tomorrow and somebody new started, my notes are in our Microsoft CRM. They could look up the history and see how



challenges were handled before. Having access to that history without searching through thousands of documents is invaluable," Jackson explains.

Enhancing Operations with Outlook Integration

Microsoft Outlook integration makes documentation easier by automatically capturing client interactions within Microsoft Dynamics 365 CRM, reducing duplicate work and making sure information is available whenever staff need it.

"We'll use our calendars to help us keep track of what we're doing each week, and then we use those calendar entries to document our interactions with clients. It immediately tracks to our CRM, so it goes right into the client history, and we can look up anything," Jackson says. This automation not only saves the team time but improves accuracy of the information and creates a scalable process as the organization grows.

Smarter Grant Management

Microsoft Dynamics 365 CRM also maintains a historical record of grant activity, helping The Arc monitor eligibility timelines, document funding activity, and key milestones. Raign states, "I track payments that come in so we know who gave at the end of the year."

The team feels confident with all the information in one place, for both easy access and easy knowledge transfer. Jackson adds, "If somebody took over grants tomorrow, they would know the next time we'd be eligible for a certain grant because some grants you can only apply for once every three years. That way, you're not going to waste time applying for something you're not even eligible for yet."



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Daniel Jackson
Employment & Outreach Specialist

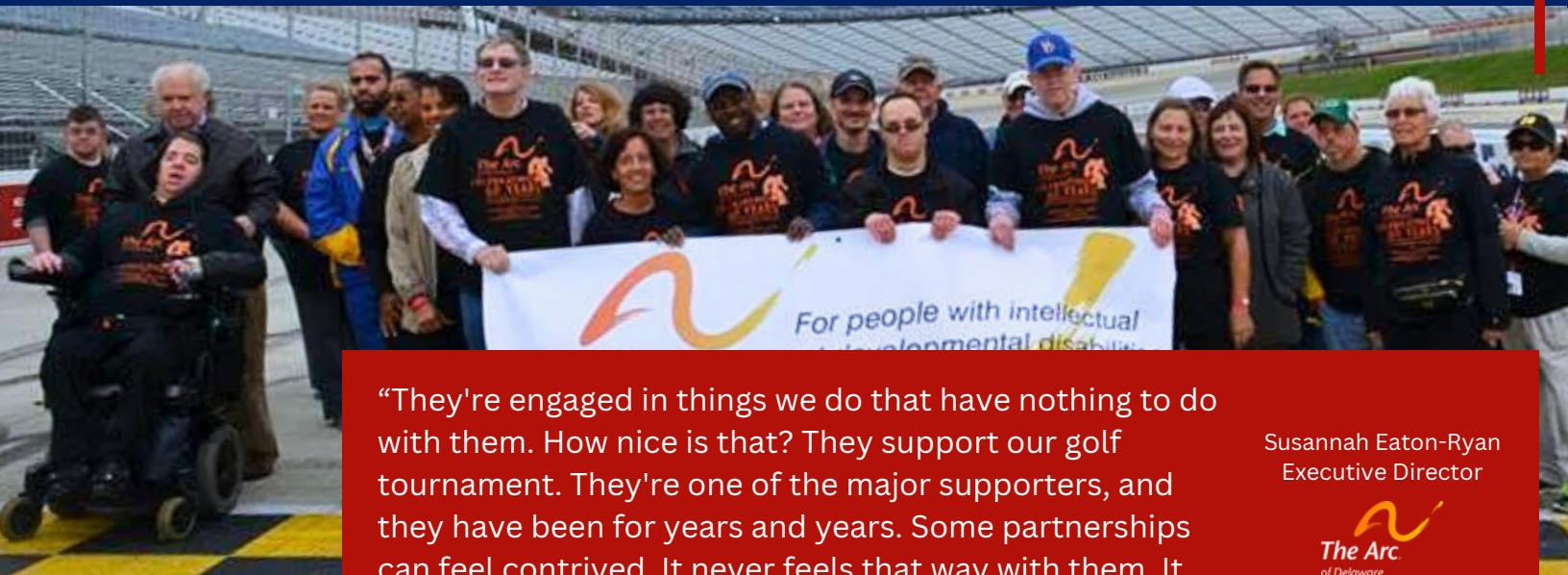


Having that information readily available helps staff stay on top of grant opportunities and maximize their requests.

Microsoft Dynamics 365 CRM has also simplified grant reporting. For example, during the COVID-19 pandemic, one county grant required staff to report every client interaction over nine months. Eaton-Ryan recalls, "It would take me two weeks to prepare the report at the end of the grant, and Intellitec helped me manage how to pull that information and organize it." Through ongoing improvements, the reporting process was eventually reduced from two weeks to just two days, giving staff more time to focus on serving clients instead of compiling reports. "Intellitec was incredibly helpful through that process of helping me understand how to find the information and organize it," she adds.

Looking Ahead

The Arc of Delaware continues to explore new ways to use technology to better support its mission, exploring other Microsoft solutions to build on its current platform. With Intellitec guiding the discussions, The Arc is building a stronger foundation for reporting, analysis, and future growth. As Jackson explains, "Intellitec will provide unmatched assistance that we just wouldn't be able to get anywhere else."



"They're engaged in things we do that have nothing to do with them. How nice is that? They support our golf tournament. They're one of the major supporters, and they have been for years and years. Some partnerships can feel contrived. It never feels that way with them. It feels like we are actually partners."

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A Partnership Built on Trust

For nearly 20 years, Intellitec has been more than a technology provider to The Arc. Through system upgrades, personalized training, and trusted guidance, Intellitec has helped the organization continue getting long-term value from Microsoft Dynamics 365 CRM while preparing for future initiatives.

"They trained us well," says Eaton-Ryan. "They understood the population they were training, so they made sure everyone got trained for what they needed and to their abilities." That support continues today. "Every once in a while, Microsoft moves things around, and I can't find the proper button," says Raign. "I'll call Intellitec, and they walk me through it."

Beyond technology, Intellitec has become a trusted partner by supporting The Arc's mission and community events. "They're engaged in things we do that have nothing to do with them. How nice is that? They support our golf tournament. They're one of the major supporters, and they have been for years and years," says Eaton-Ryan. "Some partnerships can feel contrived. It never feels that way with them. It feels like we are actually partners."