



**Board of Pensions**  
Evangelical Lutheran Church in America  
God's work. Our hands.

## Nonprofit Moves to Superior Customer-Centric Service Delivery Model

### Overview

**Country or Region:** United States

**Industry:** Nonprofit—Financial services

### Customer Profile

With 200 staff, the ELCA Board of Pensions provides retirement, health, and related benefits and services to 50,000 pastors, rostered laypersons and lay employees, along with their families.

### Business Situation

Managers wanted to move from a transaction-based service model to a more responsive relational service model. Their goal was hampered by customer data silos and poorly integrated point solutions.

### Solution

Managers utilized xRM (a Microsoft Dynamics CRM platform) to develop multiple applications based on a common platform. Collectively, the solutions deliver an integrated customer service portal.

### Benefits

- One platform, 3 applications, 9 planned
- Reduced HR new-hire processing time by 75 percent
- Reduced Retirement Group administrative hours by 50 percent

"Before, we had a distributed application architecture of 10 to 15 point solutions. Now, we're standardizing many applications onto the [Microsoft Dynamics CRM] platform."

John Lomnicki, Enterprise Architect, ELCA Board of Pensions

A multitude of point solutions gave rise to discrete silos of member data, leading to numerous headaches for the ELCA Board of Pensions. For example, 12 Board of Pensions departments could not effectively share member data nor take advantage of common workflows and practices to work with that data. This prevented IT executives from meeting a corporate initiative to become more intimate with and responsive to members. IT managers re-architected the Board of Pensions' infrastructure, placing Microsoft Dynamics CRM at its hub to serve as an application portal for 12 business line systems. They integrated it with other key systems and used its xRM platform to develop department-specific applications. The new xRM-based applications draw upon a common database and utilize workflows to dramatically improve member service and boost staff productivity.



Local Touch - Global Reach



## What is xRM?

xRM is a Microsoft application platform layer that underpins Microsoft Dynamics CRM. It accelerates the development of relational line-of-business applications through point-and-click configurations or customizations. The platform is built upon integration-friendly Microsoft technologies, such as Windows Server, Microsoft SQL Server, and the Microsoft .NET Framework. The platform's flexibility ventures beyond traditional CRM usage, giving rise to the term xRM. The "x" in this case, stands for "any" relational management application IT managers care to develop.

## Situation

The Board of Pensions provides benefits for more than 10,000 congregations in the Evangelical Lutheran Church in America (ELCA) and other sponsoring faith-based organizations. Its staff members serve 50,000 pastors, rostered lay persons and lay employees, along with their families. The ELCA established the nonprofit Board of Pensions, based in Minneapolis, Minnesota, to provide retirement, health, and related benefits and services.

Over the years, the Board of Pensions has delivered good service to its members. However, as technologies improved and business processes evolved, the Chief Operations Officer (COO) put forth a plan to build upon the Board's success.

"Fundamentally, we're a member service organization," explains John Lomnicki, Enterprise Architect for the Board of Pensions. "The COO wanted us to become significantly more intimate with our members. In operational terms, that meant we needed to move from a transactional service model to a relational one."

### Close Look Reveals Structural Defects

To translate the COO's directive into action, IT managers took a top-to-bottom look at the Board of Pensions systems. Their review showed that the existing system architecture would need to be reworked. That architecture consisted of multiple line-of-business systems that stored member data in several locations including Microsoft Office Outlook, Pivotal, and networked shared drives. The chief drawback of these systems was that member data resided in silos, leading each departmental group to manage the same or similar data in its own way.

Another architectural issue was that the Board of Pensions' Pivotal CRM

implementation caused a divide within the organization among those who had it and those who didn't. The Service Center had it but the remaining departments didn't, and therefore they were unable to directly assist the Service Center with the delivery of complementary services.

Fundamentally, these architectural limitations prohibited the consolidation and sharing of information across the organization, making a relational service model all but impossible to achieve efficiently.

Starting from scratch, the organization mapped out a new portal-based application delivery model. It conceived a single portal, using a standard user interface to provide employees with access to all the applications and data needed to markedly improve the custom service performance.

## Solution

With a strategic plan in hand, the organization assembled a suite of tools to complete the architectural transition. Its tool set included Microsoft Office SharePoint Server and the xRM development platform.

"A colleague challenged me to develop a prototype application for our HR department using xRM," explains Lomnicki. "I finished it in two hours. That's when we designated it to be our development platform for all tools and applications that interact with our members and contacts."

Hence, xRM was the development platform that allowed the creation of a centralized application and data portal that employees use to deliver member services. Working with Gold Certified partner Sogeti USA, IT staff created the Board of Pensions service portal (see Figure 1).

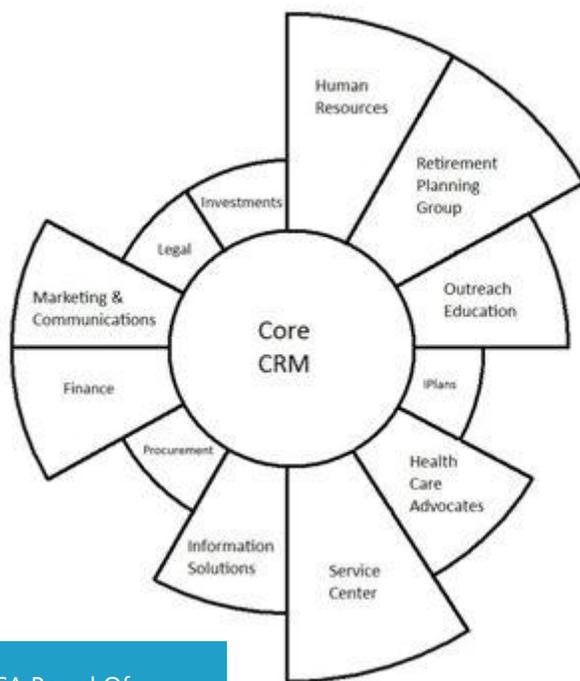


Figure 1. The ELCA Board Of Pensions xRM-Based Relational Service Portal [Note: The size of each pie piece corresponds to the amount of development work attributable to Microsoft Dynamics CRM.]

The xRM-based portal integrates with existing line-of-business applications such as the Board's Benefits Workstation tool. Additionally, IT specialists utilize Microsoft Office SharePoint Server to add functionality to portal applications. To ensure a consistent user experience, they configured SharePoint pages to have the look and feel of other often-used Microsoft applications.

The organization is also using xRM as a core platform to create 12 xRM applications. Each of these corresponds with a Board of Pensions functional area, from HR to Investments (see Figure 1).

Collectively, these applications will form the central application hub that employees will use to better serve members.

Some of the applications, such as the Human Resources solution, draw significantly upon the relational functionality, workflows, and capabilities of xRM. Others, like iPlans, use the relational functionality to a lesser extent.

#### Deployed xRM Applications

- BOP Jobs (Human Resources)**  
 The first of 12 planned xRM applications, BOP Jobs incorporated 10 custom entities and 15 workflows for use by 40 enterprise employees. Employees use the application to manage the new-hire process from end to end. BOP Jobs replaces a paper-based process with electronic records and a single database.
- Retirement Planning Group (RPG)**  
 The Board of Pensions provides retirement coaching services to pastors and other members. Financial coaches utilize the RPG application to deliver comprehensive, consistent, and effective retirement planning services. Custom entities, workflows, and Web pages provide the framework to manage the retirement coaching process. Coaches choose from among 192 retirement topics and assign homework to the member, schedule meetings to discuss each area, and record detailed notes about each contact.
- Group Retirement Plans**  
 Employees use the Board of Pensions' aggregated purchasing power to negotiate favorable pricing on products and services such as nursing homes and summer camps. This application utilizes out-of-the-box functionality to manage contacts, accounts, and activities. Price quote management functionality is slated for a future addition.

Table 1. Planned xRM

Applications: ELCA Board Of Pensions xRM applications in the development or planning stage.

xRM Application	Description
Marketing & Communications	This application will allow users to set member communication preferences, leverage workflows to complete Marcom projects and integrate print jobs with ELCA's preferred vendor.
Outreach Education	Users will leverage existing functionality to manage events and accounts.
Health Care Advocates	Advocates will use this application to manage healthcare-related inquiries, cases and activities. Data will be segregated and secured to meet HIPAA requirements.
Service Center	This application will support all non-healthcare-related cases and activities.
Information Solutions	These applications are in the early planning stages but will primarily be dedicated to facilitate collaboration with the Service Center to resolve cases. They will include vendor and event management functionality as well as activity tracking.
Investments	
Legal	
Finance	
Procurement	

Table 1 summarizes xRM applications in the development or planning stages.

### Benefits

Enterprise Architect John Lomnicki successfully established a centralized application portal by using the xRM platform, which integrates with mission-critical third-party and Microsoft stack applications. xRM also serves as an economical development tool to create or enhance applications across all 12 of the Board of Pensions departments.

#### **xRM platform delivers business benefits to IT.**

"Before, we had a distributed application architecture of 10 to 15 point solutions," says Lomnicki. "Now, we're standardizing many applications onto the platform. Not only do we get functionality but we also get automated workflows, mail-merge capabilities, and a detailed out-of-the box portfolio of other tools to work with."

#### **xRM application integrates well with enterprise systems.**

The configurability and interoperability that xRM provides with Microsoft solutions, combined with its ease of integration with third-party systems, met the Board of Pensions' objective to establish an integrated portal.

#### **xRM applications simplify environment.**

By utilizing the xRM platform, the IT team expects to reduce the number of systems in their environment by 38 percent (from eight systems to five). Correspondingly, the number of servers needed to support Board of Pensions' systems will be reduced by 40 percent (from 10 servers to six).

#### **Solution liberates IT staff to focus on high-value tasks.**

Previously, systems using Microsoft SQL Server Reporting Services required IT resources to configure. The xRM development platform has allowed business users of the BOP Jobs application to create their own views for 50 percent of their requested reports.

#### **xRM platform delivers technological benefits to IT.**

"Because the development tools are so easy to use, we can get users changes or additions within three weeks," says Ken Cychosz, Program Manager for the Board of Pensions. "The implementations have been so successful that we now have a healthy backlog of projects."

#### **xRM architecture ushers in transition to a relational service business model.**

- A 360-degree member view promotes enterprisewide awareness by employees and enables high-quality touches through the access of real-time member histories. The xRM applications utilize a Microsoft SQL Server database, which supplants distributed data stores among several line-of-business systems.

"We've seen a remarkable shift toward a relational service model through the first two applications we've implemented."

Ken Cychosz, Program Manager, ELCA Board of Pensions

- Non-technical business users create and customize workflows to optimize the alignment of xRM applications with enterprise processes and best practices. Users revise workflows without delay to continuously improve service delivery. User-configured workflows ensure that business ideas drive the development of applications, not vice-versa.

**Rapid development cycle significantly improves IT responsiveness to business requests.** The xRM development-friendly configuration and development tools allow IT managers to quickly field applications.

- The prototype of the first xRM application was completed within about four months. As an unfunded side project, it used no external consultants or dedicated corporate resources.
- Managers established a three-week change/update release cycle. Subsequent xRM application changes and additions can be made promptly and on a predictable schedule to the acclaim of business users, according to IT managers.
- Managers reconfigured development teams to be Scrum-based so that a single team focuses on development to advance synergies, build competency, and speed the development process.
- The ease of developing xRM applications led to the addition of departmental projects that did not make the original list of IT priorities. Without xRM, development bandwidth was so scarce that only enterprise-level projects received attention.

**xRM BOP Jobs and Retirement Planning Group applications deliver business benefits.** "We've seen a remarkable shift toward a relational service model through

the first two applications we've implemented," explains Cychosz. "Users went from static paper-based systems and data silos to proactive electronic systems to increase productivity."

**BOP Jobs application reduces administrative processing time by 75 percent.** The transition to an electronic application that used workflows and automation slashed the time HR recruiters spend to fill a position. The previous paper process took four hours of administrative time while the xRM application completes it in one hour.

**Retirement Planning Group application reduces administrative labor hours by 50 percent.** Coaches utilize workflows to complete member retirement counseling programs. The application allows them to record notes during sessions and utilize integration with Microsoft Office Outlook to garner the benefits of one-stop meeting and task scheduling and e-mail communications.

**xRM applications promote consistent employee performance and member experience.** The use of workflows in each of the applications ensures that employees follow standard processes while tracking each member case at every stage of the process.

## For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers in the United States and Canada who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to:

[www.microsoft.com](http://www.microsoft.com)

For more information about Sogeti USA products and services, visit the Web site at:

[www.us.sogeti.com](http://www.us.sogeti.com)

For more information about ELCA Board of Pensions products and services, visit the Web site at:

[www.elcabop.org](http://www.elcabop.org)

## Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to:

[www.microsoft.com/dynamics](http://www.microsoft.com/dynamics)

### Software and Services

- Microsoft Dynamics
  - Microsoft Dynamics CRM 4.0
- Microsoft Office
  - Microsoft Office Enterprise 2007
  - Microsoft Office SharePoint Server 2007
  - Microsoft Office Live Meeting 2007
  - Microsoft Office Visio 2007
  - Microsoft Office Project Server 2007
  - Microsoft Office Project Professional 2007
- Microsoft Server Product Portfolio
  - Microsoft Exchange Server 2007
  - Microsoft SQL Server 2005
  - Windows Server 2003 R2
  - Windows Server 2008 R2
- Microsoft Visual Studio
  - Microsoft Visual Studio Team System 2008 SP1
- Windows XP
- Technologies
  - Microsoft SQL Server 2008 Reporting Services

### Partners

- Sogeti USA