



# Endeavour Foundation

## Dynamics CRM-Case Management

### About Endeavour Foundation

- Dynamics CRM- Case Management

Endeavour Foundation is an independent, for purpose organisation established in 1951 with a vision to support people with an intellectual disability to live their best life – starting with equal access to education and life-skills learning.

Endeavour supports people with an intellectual disability to live, learn, work and flourish according to their own interests and priorities. They are at the heart of local communities – offering choice, opportunities and personalised support in Queensland, New South Wales and Victoria.



### Client Challenge

“We needed a way to record client information and client interactions including case notes and the time spent with clients as part of funding and Acquittal Reporting,” said Martyn Baldwin ICT Manager. “Reporting was critical both internally for management decision support and external for federal and state government agency reporting requirements via a Government Data Exchange.”

“After considering several options we selected Queensland based Apache to implement a solution based on Microsoft Dynamics CRM. As a Microsoft Gold and Telstra Partner, Apache offered us an opportunity to learn from their experience in developing similar solutions for other "Not For Profit" organisations. “

Dynamics CRM was configured, and a new entity created to capture all information pertaining to the treatment of a client. This provided a single place to record all interactions..... calls, case notes, doctor and psychologist visits.

Given the sensitive nature of the client data, security was an essential part of the solution and was managed through the business unit and security roles. This ensured users could only view sensitive formation in pertaining to their own clients while primary information about the client; email, addresses etc. was visible to the whole organisation.

A report of all client interactions over a specific time period was developed so that data could be extracted and uploaded to the Government Data Exchange for billing against awarded contracts.

Apache continues to work with Endeavour Foundation, enhancing the solution to accommodate changes to the Government Data Exchange Platform and new functionality as additional business units are on-boarded.