

## Integrated Reporting System Helps Financial Services Company Fulfill Its Mission to Serve the Community

### Client

The client is a leading provider of financial and real estate resources for non-profit organizations in the upper Midwest. Specifically, our client provides mortgage loans and specialized real estate development services that help build stronger non-profits to serve low-income communities.

### Executive Summary

Existing applications included custom developed loan servicing software, not for profit accounting software, an internet based time and expense entry application, and spreadsheet based project billing. Our client was looking for an integrated solution to increase operational efficiency and equip the client with the ability to provide a holistic view of leads, opportunities, loans and projects. Given their public mission, the solution had to be cost-effective, expandable and easy to use. The Revere Group designed, developed and implemented a solution integrating a new off the shelf industry specific loan application, Dynamics GP, Dynamics CRM and an add-on to Dynamics GP called WennSoft that handled the time and expense entry and invoicing needs. This fully integrated solution allows the client to enter the data once and then report on any data that is entered.

### Business Challenge

Replacing an aging set of discrete applications and manual processes caused significant amounts of double keying and the inability to have a comprehensive view of the business. The two main business lines (loans and projects) had significantly different needs and were both expanding. These business drivers, coupled with a limited budget, led our client to look at two different possible models to pursue. Another Dynamics GP reseller proposed a quick implementation of the basic modules, with the hope that the pieces would fit together. The Revere Group proposed another model – Solution Design that determined up front how all the applications would meet the business needs and work together.

### Solution

Revere recommended that the client starts with an initial project to define a solution. During this project, we identified the organizations business goals and from there derived the business requirements to accomplish those goals. From those business requirements, The Revere Group defined an application solution set that covered all aspects of their business (prospecting, opportunities, loans, projects). It allowed for business line and geographic growth.

The overall solution included a best of breed commercial loan application that could be used to handle current and other types of commercial loans. Wennsoft was included to handle their project based time and expense entry, project accounting and invoicing needs, Dynamics GP was selected to be the accounting backbone of the solution, the Analytical Accounting and Grant Management modules were included to provide information needed regarding their grant portfolio, and Dynamics CRM would provide lead and opportunity tracking including the data that they track to report to grant and governmental agencies regarding their impact in the community. This comprehensive solution design was matched against the business needs and provided a roadmap of how the solution met the current and future business needs.

### Results

“We decided to hire The Revere Group because they had the right technical skills, the right industry skills and the right approach to solving our business issues - spending the time up front to design a comprehensive solution. I feel comfortable knowing our technology investments meet our needs, are integrated correctly, and will help us grow and prosper for years to come.” – The client’s CFO



## For More Information

For more information about The Revere Group's services and solutions, call 888. 4REVERE.

## About The Revere Group

The Revere Group is a North American Business Unit and a majority-owned subsidiary of NTT DATA, a multinational organization.

Founded in 1991 and headquartered in Chicago, The Revere Group is a leading global business and IT solutions consultancy that specializes in assisting high performing mid-tier and fast growing companies. Revere provides industry, process and technology expertise with a proven service approach—Think, Build, Source—to pave the way for your success. Revere focuses on five key business challenges to increase your business agility and bottom line results: [Operational Efficiency](#), [Analytics and Collaboration](#), [Interactive](#), [Enterprise Platforms](#) and [Managed Services](#).

For more information about The Revere Group, go to [www.reveregroup.com](http://www.reveregroup.com).

## Results

Now, the client is able to enter information in one location with minimal re-entry. A reporting engine will be created to operate the business with the concept to be a dashboard based operation where reports and graphs can span any operating entities either business operations or geography based.

The client has also been able to automate many of the manual error prone processes and can now quickly and easily view operational and financial data that used to take days to prepare. Systems are linked together and there is now a single source of data for each area of the organization. Basic reports have been created, and the process will now move to creating complex reports and views that integrate information from the new sources systems (i.e. comprehensive view of opportunities and active projects by service line).

## Think. Build. Source.

As your trusted advisor, Revere provides industry, process and technology expertise with a proven service approach—Think, Build, Source—to pave the way for your success.

**THINK** – Companies continually face the challenge of aligning their business objectives with their IT strategy. An effective roadmap with a strong business case delivers a path to achievable goals with measurable results. Revere helps identify and link people, process and technology, bringing clarity to your business and IT initiatives.

**BUILD** – A successful implementation is the driving force behind all that Revere does. We deliver the right solution on time and within budget. Disciplined project management skills and business aptitude ensures the success you rely on.

**SOURCE** – The right balance of sourced functions can improve your IT service levels and return on investment, allowing you to more effectively meet your business needs. Revere helps identify a strategic sourcing model based on internal capabilities, external resources and cost.