How we built an app that modernized document management and automated report generation to bolster productive workflows

Process Transformation

The client

A non-profit organization operating in the western half of the United States serves small, rural communities through programs and services that deliver technical and financial assistance. They develop partnerships with these communities to identify needs, set goals, and determine action plans. Their major programs include housing, lending, environmental infrastructure, and community development.

Industry Not-for-profit

About
- 200+ active grants & contracts
- 180+ Professionals
- 120 Funders

Contracts are an important part of our client's organization, as they manage all projects and partnerships through them.

The challenge

The Grants and Contracts (GCA) team needed a solution that modernized how they interacted with hundreds of active contracts. Their legacy system was complex, making data entry inconsistent and data retrieval difficult. For reporting purposes, other organization members had to go through the GCA team to access contract details, creating a bottleneck.

They turned to us to implement a new system allowing a consistent and intuitive overview of their contracts while simplifying reporting methods.

The solution

We implemented a solution to transform their legacy system and bolster productivity, emphasizing an easy and intuitive end-user experience. We approached this challenge using SharePoint Framework webparts integrated with a powerful Azure SQL database to display a full-fledged business application within a SharePoint site.

The app provided a concise overview of the organization's contracts while ensuring data entry and extraction was quick yet consistent. It transformed the reporting process through a report generator functionality. We also used Logic Apps to automate contract lifecycle reporting and mandatory tracking emails.

Notable features:

- Homepage filters to search for and display contract details, with built-in contract editing functionality
- Quick view panel to provide frequently needed contract information
- Report generator to pull reports as needed or create custom reports

"They wanted to deeply understand our work so they could provide us with the infrastructure we had been missing. It was a pleasure to work with them!"
- Assistant Director of Grants and Contracts

The Results

The new system uncovered the value of shared information for our client. With our solution, they now had a single place to capture, view, and use their contract data throughout the lifecycle of an agreement. With end-to-end visibility and broader access to reporting, users now have easy and intuitive access to the information they need daily.

Legacy systems, repetitive tasks, and disarranged data. These are a few of the workflow issues slowing down organizations. If you're struggling with inefficient processes, we can help!

Book your consultation