

# Agenda Builder

*Information Strategies developed the Agenda Builder using the Microsoft CRM development platform, which provides scalability, flexibility, and extensibility.*

## BACKGROUND

Oftentimes, Government organizations bring officials together on a regular basis to meet and vote on key measures critical to the smooth operation of the county, city, or state. Typically, departments or other organizational divisions are required to prepare agenda items and provide necessary backup information to the administrators and other internal organizations so as to make informed decisions regarding the operational needs of its departments. Some of the main needs of government organizations that meet to discuss these issues are reducing the time required to prepare for the meetings, providing greater visibility into the preparation process, and improving the accuracy of documents submitted.

## PROBLEM

Many government organizations, whether it be, at the county, state, or federal level, are in similar situations. Meetings are necessary for people from across an organization to come together to discuss and decide on important items. In many cases, vital preparation steps are forgotten until the last minute and employees don't always have a good way to share their progress on requirements. Managers have to constantly follow-up and review progress in order to prevent unwanted surprises and to ensure that no steps or requirements are missed.

The time and energy required to prepare for each meeting inevitably increases as the organizations grow and the need to serve constituents grows at an even faster rate. These government organizations needed a way to meet increasing demands without increasing administrative headcount.

Some of the key preparation requirements include:

- Users must be able to see the progress made by others within their department so that requirements can be completed in the proper order.
- Managers must be able to see progress to ensure that all requirements will be accomplished accurately and on-time.
- Managers must be able to reassign tasks when users fall behind and when employees are out sick or on vacation.
- Users need to track activities associated with preparing for each Court/Meeting session and be able to review past history in preparing for the current court date.

### **Solution at a glance**

Microsoft CRM based application that leverages .NET extensibility

### **Technologies Involved**

Microsoft Dynamics CRM, SQL Reporting Services, Microsoft Office SharePoint Server 2007 and Microsoft Excel

## SOLUTION

Information Strategies developed the Agenda Builder using Microsoft CRM and its integrated Workflow Manager as the foundation. The dramatic improvements in both process visibility and efficiency have reduced the time required to complete requirements, in some cases from days to minutes. Because of Microsoft CRM's tight integration with Microsoft Excel and Microsoft Word, users can continue to use familiar tools and templates to prepare requirements, making the implementation process painless and significantly reducing the training required to implement this valuable solution.

Business and data integrity rules for agenda requirements are enforced by the CRM Workflow Manager in conjunction with data validation and security logic within Microsoft CRM. Document Storage and versioning for artifacts is fully integrated through Microsoft Office SharePoint Server (MOSS) 2007. Requirement preparation activities and status dashboards are viewable based on security roles assigned within Microsoft CRM.

Furthermore, the employment of SQL Reporting Services allows many options for reporting and exporting data to include creation of PDF files and data transfer to other systems.

The primary purpose of the Agenda Builder is to enable users to easily track preparation progress, track activities and history, store applicable documents, review agenda items, and print required documentation. Key functionality includes:

- Dynamic Requirements building capability
- Outlook integration for tracking tasks, relating e-mails and documenting activities
- Progress Dashboards for status updates
- User defined queues for work routing and assignment
- Ad-Hoc Reporting Capability
- Easy exporting/printing to Excel, Word or PDF

## FURTHER IMPLEMENTATION

As State and Local Governments seek to benefit from the cost advantages and speed of implementing Microsoft based technology, the Agenda Builder provides a cost effective solution for reducing the time required to prepare for council, court, board, precinct or committee meetings. Information Strategies continues to be a leader in developing innovative solutions based on Microsoft CRM that help organizations meet increasing demands for better service and quality at a lower cost. We continue to enhance the functionality of the Agenda Builder as users recommend improvements to this versatile application which leverages the many strengths of Microsoft CRM technology.