

California Association Brings
Experience and Education to
Public Water Agencies with
Microsoft Dynamics CRM

Case Study



**Association of
California Water Agencies**

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At A Glance

Since its inception more than 100 years ago, ACWA has been a guiding force in California water policy and continues to help shape laws, regulations, and vision for advancing a sustainable, comprehensive water plan for the state's future. With its implementation of Microsoft Dynamics CRM, ACWA streamlined and automated maintenance of member information, event registration, and revenue reporting of registration fees in ACWA's Intacct accounting system.

Software & Services:

- Microsoft Dynamics CRM Online
- Adaptive Insights
- Intacct
- Power BI
- Armanino consulting services, development and implementation services

Benefits:

- Eliminates the need to spend weeks reconciling conference registration data with the accounting system
- Provides accurate member, registration, and revenue data in real time
- Automatically updates the CRM, registration, and accounting systems whenever a change is made to one of them

Business Challenge

The Association of California Water Agencies (ACWA) is the largest statewide coalition of public water agencies in the United States. Its 430 members are collectively responsible for 90 percent of the water delivered to California's cities, farms, and businesses.

To fulfill its mission of assisting its members in promoting the development, management, and reasonable use of water at the lowest practical cost in an environmentally sustained manner, the ACWA organizes conferences, educational seminars, and training events for its members. The association plans and executes two major annual conferences, arranges numerous topic-specific workshops each year, and offers other professional development programs to meet member needs.

Previously, ACWA relied on disparate systems to manage member information, event registration, and revenue recognition for registration fees. None of the systems were integrated with each other, making data reconciliation manual, time-consuming, and frustrating. "It was a headache to reconcile the membership data with registrations created on the event website and reconcile the registration fees with our accounting system," says Christopher Do, chief technology officer with ACWA. "It was also getting too expensive to maintain our old membership system. Every time we needed to add a field, we had to contact the vendor, making customization a nightmare."

Solution

The association decided the time was right to implement a new customer relationship management (CRM) system and integrate it with Intacct, a newly deployed, cloud-based accounting system. "After looking at 40 different vendors, we chose Microsoft Dynamics CRM Online," says Do. "Dynamics CRM was our top choice for many reasons, including ease of support and customization."

Having chosen its new CRM system, ACWA knew it needed a strong, experienced partner to implement the CRM, create a new web-based event registration system, and integrate both systems together with each other and with the Intacct accounting system. "We were looking for a partner with the ability to deliver the project on schedule and support us after the implementation," says Do. "We selected Armanino because the firm had the deepest experience with Microsoft Dynamics CRM implementations." Armanino was also ACWA's implementation partner for their Intacct accounting system and Adaptive Insights financial planning and analysis.

With cloud computing being one of the organization's strategic objectives, ACWA decided to deploy the cloud-based version of Dynamics CRM hosted on Microsoft Azure. The new CRM system helps ACWA track all

of its member information, as well as survey responses, membership in elected boards, and representative information for each district.

In addition to implementing the CRM system, Armanino developed a custom web application for conference registration and online payments. The new registration system supports ACWA's unique requirements, including kiosk functionality for checking in at conferences and printing badges and tickets.

Results

“It used to take weeks to reconcile the figures after a conference. Now, I can look at my phone at any point and see an accurate count of exactly how many people have registered and how much conference revenue we have.”

-Christopher Do
Chief Technology Officer
Association of California
Water Agencies

Today ACWA has a seamless process for tracking member information, registering members for events, and recognizing the revenue in the accounting system. All data is available in real time and changes made are reflected automatically in their CRM, website, and accounting system. “It used to take weeks to reconcile the figures after a conference,” says Do. “Now, I can look at my phone at any point and see an accurate count of exactly how many people have registered and how much conference revenue we have.”

In addition to the enormous time savings, ACWA also appreciates the new member portal where members can update their own information as well as the ability for one contact person at an agency to register multiple people. “These are a few of the new features that our members really like,” says Do. “We’ve gotten a lot of positive feedback from our members on the new system.”

Do credits Armanino with helping the association achieve a smooth, pain-free deployment. “Unlike most vendors I’ve worked with, Armanino has strong, senior people who know what they are doing,” says Do. “They were well prepared, asked the right questions, and helped us stay on time and budget.” At the first conference ACWA held using the new system, Do reports that the registration module worked seamlessly.

Next Steps

Encouraged by the easy customization potential with Dynamics CRM, ACWA is considering adding enhancements to further improve the member experience. “One enhancement we are excited about is automatically capturing attendance at sessions where ACWA members can earn continuing education units (CE),” says Do. “If we automatically capture the information, we can provide members with faster and easier access to their CE status.” Additionally, the ACWA team is looking forward to the possibility of rolling out CRM on mobile devices for field representatives as well.

As ACWA continues to improve upon the new system, it knows that Armanino is there to help. “Our Armanino consultants feel like a part of the ACWA team,” says Do. “We really believe they have our best interests at heart.”

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About Armanino^{LLP}

Armanino^{LLP} (armaninoLLP.com) provides an integrated set of accounting services—audit, tax, consulting and technology solutions—to a wide range of organizations operating both in the US and globally. You can count on Armanino to think strategically, to provide the sound insights that lead to positive action. We address not just your compliance issues, but your underlying business challenges, as well—assessing opportunities, weighing risks, and exploring the practical implications of both your short- and long-term decisions. When you work with us, we give you options that are fully aligned with your business strategy. If you need to do more with less, we will implement the technology to automate your business processes. If it's financial, we can show you proven benchmarks and best practices that can add value companywide. If the issue is operational, we'll consult with your people about workflow efficiencies. If it's compliance, we'll ensure you meet the requirements and proactively plan to take full advantage of the changes at hand. At every stage in your company's lifecycle, Armanino can help you find the right balance of people, processes and technology.

About Armanino's Microsoft Dynamics Practice

Armanino is one of the largest Microsoft Dynamics partners in the nation as a value-added reseller (VAR) and implementation partner for Microsoft Dynamics CRM, Dynamics AX, and Dynamics GP. Additionally, the firm offers the Microsoft Dynamics AX for High Tech Industries™ Certified for Microsoft Dynamics (CfMD) solution. This product helps software and internet, semiconductor, medical device and electronics manufacturers to empower their sales forces, cut costs and time-to-market, improve forecast accuracy, and manage distributor relationships and supply chains. As a Microsoft Inner Circle member, Armanino is among the top one percent of partners around the globe.