

CASE STUDY: AINSLEY'S ANGELS



www.AinsleysAngels.org

Dyn365Pros Helps Ainsley's Angels Automate New-Member Onboarding and Management

By encouraging everyone to participate together in running events, Ainsley's Angels has built awareness about the special needs community and the importance of creating all-inclusive communities. Using Dynamics 365 and Power Automate to streamline the process of onboarding and managing volunteers and participants allows Ainsley's Angels to better serve their members, grow the organization and advance their mission.

"As a growing nonprofit with locations across the country, we needed a CRM that would enable us to optimize our relationships and interactions efficiently and effectively with our members."

JOE ORTH

Executive Vice President
Ainsley's Angels

Ainsley's Story: Ainsley is the daughter of Kim and Lori Rossiter. At age three, Ainsley was diagnosed with Infantile Neuroaxonal Dystrophy, a rare terminal illness that eventually results in global paralysis. When Ainsley went for her first jog during a local road race in 2008, she gave a radiant wind-induced smile that anyone would envy. In an instant, running provided the family with a therapeutic means to fight the devastation associated with learning and trying to live with the fact that sweet Ainsley had a terminal illness that would eventually take her to heaven in February of 2016. Since 2011 the Rossiters have been inspired to help others experience the same joy as Kim and Ainsley. That is when Ainsley's Angels was founded and today, Ainsley's Angels is transforming populations in hundreds of communities across the nation.



"Working with Dyn365Pros was terrific! The level of care that we got was undeniably great. The communication between both parties was clear and concise, and I always felt like our questions and concerns were addressed promptly, just as we discussed."

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The Challenge: New member growth was outpacing Ainsley's Angels' ability to manage onboarding, member management and reporting. With dozens of new members spread across 29 states and 100s of communities joining daily, old manual processes made it difficult to keep up. New members had to be tagged as runners, riders, or guardians. Emails needed to go out confirming registration and alerting ambassadors of new members. Manually adding new members to email groups based on location was labor-intensive. Reporting required exporting and reformatting CSV files from the website's back end.

How We Helped: Dyn365Pros met with Ainsley's Angels to perform a deep dive into their needs and process. Based on those discussions, Dyn365Pros designed and implemented a system utilizing Dynamics 365 Customer Engagement and Power Automate to achieve the following objectives:

- Consolidate and manage member data
- Import and segment runners, riders and guardian angels
- Send confirmation and follow-up emails to new members
- Alert ambassadors of new registrants in their area
- Create member groups to ease ambassador communications
- Structure CRM data for ease of queries and reporting
- Create dashboards visualizing critical member and ambassador KPIs

"We were surprised by just how much time we have gotten back with Dynamics 365 running the show. With phase 1 being complete, we have more time to focus on other tasks while trusting that the system is working and doing its job. We are looking forward to starting phase 2 and continuing to build out our CRM with the fantastic support from Dyn365Pros."

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The Results: Now, new member data automatically passes from a sign-up webpage to Dynamics 365 via Power Automate. New members become Dynamics 365 contacts, flagged by attributes such as their member type and location. New members receive confirmation and follow-up emails based on CRM templates and workflows. Ambassadors are introduced to their new members so they can get familiar with and share information on future races/events. Power Automate adds members to email groups without any user intervention. A custom table stores information about ambassadors and members in their territory. Dashboards and charts display real-time data about association members and ambassadors, such as member type and registration dates.



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