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CASE STUDY



EIMAGINE AND IDVA CONFIGURE SALESFORCE TO ALLOCATE FUNDING FOR INDIANA VETERANS

“*MFRF applicants and the MFRF team are benefiting from the new system. We can process assistance faster and connect them with a variety of different sources of help easier. The MFRF now has applicant records at our fingertips which makes handling veteran and vendor questions more efficient.*”

—Mike Thompson
Operations Director, Indiana Department of Veterans Affairs

THE CHALLENGE:

Previously the MFRF application was a 100% paper procedure, requiring manual input and management. As a result, the process suffered from:

- Slow turnaround times
- Lack of communication between systems
- Unnecessarily complex reporting structures

Slow turnaround - Verifying each applicant's eligibility was time-consuming and tedious. Veteran records were kept in physical file folders, each with several paper documents needing review to determine eligibility. The timeliness of these transactions depended on how quickly employees could manually process this paperwork.

Lack of communication - Interaction between departments was a struggle. IDVA partners with multiple organizations and vendors who need to quickly and accurately communicate with each other to process applicants. However, the inherent challenges of a manual system meant that stacks of paper from the various agencies often remained in silos.

Complex reporting - The system also had to deal with multiple spreadsheets which tracked all applications from the program's inception in 2007. Approximately 10,000 lines of data were contained in these spreadsheets. This was in addition to each applicant's file folder of paper documents. Gathering report data from this platform was time-consuming and cumbersome.

The COVID-19 pandemic brought additional challenges. Working from home meant staff had to bring home boxes of files, which was neither sustainable nor secure. COVID-19 also meant an influx of new applicants. Within a couple months, the workload increased exponentially, and the IDVA's need for a paper-free process was greater than ever.

ABOUT THE CUSTOMER

Indiana Department of Veterans Affairs - Military Family Relief Fund

Indiana Department of Veterans Affairs - Military Family Relief Fund (MFRF) has remained focused on aiding and assisting Indiana's veterans and family members or survivors, who are eligible for benefits or assistance provided by Indiana Department of Veterans Affairs (IDVA). The MFRF provides emergency assistance for essential household needs that have become difficult to afford.

THE SOLUTION:

IDVA partnered with eImagine to create a Salesforce system that would transform their paper-intensive application process to a single cloud platform solution.

eImagine configured Salesforce to provide:

- **Quicker Turnaround** - Ability to input applicant data, create profiles, and approve or deny an application within a single cloud-based system.
- **Improved Communication** - Ability to send application reminders, share resources from other agencies, and send event invites to veterans in Indiana.
- **Streamlined Reporting** - Easy access to digital records provided the ability to quickly and accurately report on agency performance, track funding allotment, and send results to respective agencies.

THE RESULTS

THE NEWLY CONFIGURED SYSTEM HAS ALLOWED IDVA TO GIVE **FINANCIAL SUPPORT TO MORE VETERANS IN A SHORTER AMOUNT OF TIME.** THE NEW SYSTEM ELIMINATES THE NEED FOR MANUAL SEARCHES THROUGH BOXES OF PAPERWORK. IDVA EMPLOYEES CAN NOW QUICKLY ACCESS VITAL DOCUMENTATION, GETTING MORE APPLICANTS TO THE AID THEY NEED.



Easier remote work.

With more work done from home offices, accessing records from the cloud makes information easy to retrieve. There is now no need to carry file boxes from one location to another to see basic applicant information.

Quicker turnaround time.

Team members can now share information in a matter of minutes, whereas the review process prior to Salesforce would take hours, if not days.



Customized dashboards.

Efficiency metrics such as the number of applications processed, award amounts approved, and regional allocation, may now be viewed instantly.

More efficient processing.

Within the first 9 months, the MFRF team processed 403 applications with a requested assistance amount of \$1,181,000 and approved 91 applications for a total of \$182,826 in assistance - all accomplished with the number of employee hours cut in half.



Helpful reminders.

Applicants have 30 days to submit applications. Salesforce helps IDVA keep applicants on track by sending reminders of approaching deadlines.



Salesforce empowers users to be more productive. It brings continuity, ensuring users follow a repeatable process. It is a single repository from which users can collaborate; eliminating the need for non-system communications and reports.