MINISTRY FINANCIAL SERVICES SUCCEED WITH NEXT GENERATION CLOUD SOLUTION

THE CHALLENGE:

DDI-Connect™ has been in production within DDI's private cloud infrastructure for over 30 years. It lacked modern navigation features and user appeal. It was also difficult to maintain and becoming insufficient for the changing business landscape. DDI-Connect™ could not function as a true CRM, forcing some clients to supplement their operations with a separate CRM platform, such as Microsoft Dynamics or Salesforce.

The Requirements

DDI developed a strategy for modernizing DDI-Connect™ using Microsoft Dynamics and Business Central as the foundation. They needed secure, reliable cloud architecture, as well as a product that was efficient, intuitive, and optimized for their clients' particular needs.

The First Attempt

In 2017, DDI began converting their legacy software to the Microsoft ecosystem. DDI worked with a software consulting company aimed at producing a completely configurable solution. However, issues arose around functional integrity and project execution. DDI realized changes in approach were necessary to avoid risks to its reputation.

The New Approach

DDI partnered with eimagine to rescue the project and create a dynamic cloud-based system. eimagine eliminated several tools intended to preclude software coding and relied upon our certified Microsoft experts. As a result, the Next Generation of DDI-Connect™ platform not only meets but transcends the requirements for DDI and their clients.

ABOUT THE CUSTOMER

DiscipleData, Inc.

DiscipleData, Inc. (DDI) provides cloud-based software and services for nonprofit financial ministries. In continuous operation for over 50 years, the company is well-known as a trusted partner to faith-based organizations across the nation. Its flagship product is DDI-Connect™, a cloud-based software service that integrates CRM, investment and accounting faculties, and portal e-services.

> " *The relationship between our organizations has been very strong, while the development practices and technical results are even stronger. More importantly, we have a product that exceeds our clients' expectations, while enhancing their mission and enabling their growth. With the ability to now expand our product to additional non-profit and mission-minded organizations, we know selecting eimagine was a bullseye in allowing us to achieve our objectives.*

—Kevin Hesler, VP of DDI Operations

THE SOLUTION:

The eimagine team, certified in Microsoft Dynamics, partnered with DDI to develop and implement a new custom software solution. Through a series of critical architectural and design change recommendations, eimagine worked with DDI to create the Next Generation of DDI-Connect™, an updated platform which utilizes Business Central, Microsoft Dynamics and PowerBI. The solution includes the following aspects deemed as essential functions of DDI's Next Generation platform:

• Modern navigation and mobile capability

• Ready access to data

• Ease of producing reports and client correspondence

• Integration between D365/Business Central

• Scheduled job processing and reporting

• Reliability, security, and extensibility

DDI has been successfully onboarding its clients to the new platform.

KEYS TO SUCCESS:

In addition to the technical expertise, one can trace the smooth and successful completion of this project to business practices such as:

• Daily stand-up meetings and weekly status reports

• Monthly executive meetups

• Agile software development practices

• Robust and predictable QA to confirm functional development mapped to specification

• Business requirements/change control meetings

• Commitment to transparency, collaboration, and shared vision

THE RESULTS

DDI-CONNECT™ IS NOW A FULLY FUNCTIONAL CLOUD-BASED FINANCIAL SERVICES SOLUTION

Functionality is key:

DDI-Connect™ can work as a CRM to track data, serve as a product platform for loan/investment management, and as an accounting platform to govern internal financials associated with over $2 billion worth of assets.

User experience is paramount:

DDI-Connect™ demonstrates navigation consistency and ease of use throughout the entire platform for high client satisfaction.

A competitive edge keeps DDI at the top:

The new solution provides DDI with an advantage over competitors by performing a wide menu of functions in one consolidated, modern platform.