



## LSU Agricultural Center Supports Community Outreach and Government Reporting with CRM

### Overview

**Country or Region:** United States

**Industry:** Education—Higher education institutions—Universities; Education—Higher education institutions—Public research centers

### Customer Profile

The Louisiana State University Agriculture Center (LSU AgCenter) provides agricultural research and educational outreach programs to help better the lives and economic well-being of the people of Louisiana.

### Business Situation

The center relied on multiple, disparate systems, limiting its ability to provide reporting to local and federal funding sources.

### Solution

With help from a Microsoft partner, the LSU AgCenter implemented Microsoft Dynamics CRM and tailored the solution to track time, expense, and community outreach efforts and to perform government reporting.

### Benefits

- Improve reporting and accountability
- Enhance organization and constituent insight
- Ease IT development and support

*“The ability to customize Microsoft Dynamics CRM to meet our unique needs, and to be able to do so with very little effort, was a big part in our decision to implement it.”*

*Sarah Johnston, IT Manager, Louisiana State University Agricultural Center*

The Louisiana State University Agricultural Center (LSU AgCenter) provides agricultural research and educational outreach programs, such as 4-H, to the people of Louisiana. With its funding coming from both local and federal government, government reporting is a top concern for the LSU AgCenter. But with multiple, disparate systems in place for tracking employees' time, expense, and outreach efforts, the organization lacked the ability to provide comprehensive reporting, hindering its accountability. To address this challenge, the AgCenter deployed Microsoft Dynamics CRM and tailored the solution to the needs of its outreach programs. Now, with one system in place, the LSU AgCenter has eased government reporting, providing reports on an as-needed basis; improved business insight; and eased its development and IT support requirements.

“When it comes to reporting, we now capture the wide range of data that we need—from client demographics all the way to the particular type of crop that a client grows, such as soybeans or cotton—so that we can see where the money is going.”

Sarah Johnston, IT Manager, Louisiana State University Agricultural Center

## Situation

The [Louisiana State University Agricultural Center](#) (LSU AgCenter) is one of 11 institutions within the Louisiana State University System. With more than 1,000 employees, the LSU AgCenter provides the people of Louisiana with research-based educational information that helps improve their lives and economic well-being. The LSU AgCenter includes the Louisiana Agricultural Experiment Station, which conducts agricultural-based research, and the Louisiana Cooperative Extension Service, which extends the knowledge derived from research to the people of the state through educational outreach programs.

Managing these outreach programs, the LSU AgCenter maintains a team of more than 400 extension agents who support community educational programs that span agriculture and natural resources, family and consumer sciences, and 4-H. Through these outreach programs, agents make around 1.8 million client touch points per year. Some of these touch points can include:

- Corresponding through email or a phone call.
- Visiting a crop producer’s on-site operation to identify a crop infestation.
- Conducting nutritional education and food safety programs.
- Providing citizenship and leadership development opportunities to youth through 4-H.

And, as a part of offering these outreach programs, which are local, state, and federal funded, LSU AgCenter must be able to document and then report to government and other funding agencies, such as the National Institute of Food and Agriculture (NIFA), on its interactions with the public and how it is spending public funds. To do this, the LSU AgCenter relied

on four custom-developed systems; several smaller, ancillary systems; and a range of manual and paper-based processes. Says Sarah Johnston, IT Manager for the Louisiana State University Agricultural Center, “To document and gain any real insight into the people we work with and justify our outreach work to our funding agencies, our agents were required to perform duplicative data entry in multiple systems. This duplication of effort was an inefficient use of resources, and the multiple systems prevented us from having any real-time insight and hindered our accountability.”

With shrinking government budgets following the global economic downturn, the need to improve its accountability became increasingly pressing for the LSU AgCenter. “Although many of our funding sources only needed reports at the end of the year, it was not uncommon for other constituents to ask for reports on a quarterly or half-yearly basis, which required us to provide estimates based on our total pipeline,” adds Johnston. “Because there was little consistency in employees’ reporting cycles, that pipeline was not always accurate. And with government budgets diminishing, we needed a way to justify our spending so that we could maintain the funding we did receive and be well positioned to get more funding when it was made available.”

At the same time, the ability to capture a comprehensive and relational set of data was limited. For example, agents were unable to associate a date with their entries or make notes to distinguish the entries. Agents also only had functionality to record client touch points, rather than associate those touch points with a client record to gain any real insight into that relationship.

With a need to drive higher levels of accountability and secure its funding, the LSU AgCenter understood that it would need to consolidate to one system and provide the ability to capture a more comprehensive data set through that system.

## Solution

In looking for a single system to manage its outreach work and improve government reporting, the LSU AgCenter chose [Microsoft Dynamics CRM](#). Says Johnston, “The ability to customize Microsoft Dynamics CRM to meet our unique needs, and to be able to do so with very little effort, was a big part in our decision to implement it. I don’t think we could have done so with any other solution.”

To deploy the solution, LSU AgCenter initially worked with [CoeSolutions](#), a Microsoft partner, during the planning stages and then carried through to deployment with its own IT team. Currently, 400 extension agents use Microsoft Dynamics CRM every day. Beginning at the start of the work year, these agents use the system to build a plan of work for the coming year. When agents begin the year, they can record their work against that plan. The data that agents record can include time, expense, and contacts, such as youth recruited through a 4-H program.

For each educational programming area, Microsoft Dynamics CRM provides custom functionality. For example, for youths participating in Shooting Sports, a 4-H program, an agent can record attendance at regular meetings, which can then be used to quickly and easily determine eligibility in local and state competitions. The LSU AgCenter’s Organizational Development and Evaluation department and managers can then draw on time and outreach information to evaluate employee

performance and quickly generate reports, including government reports such as those for NIFA. Says Johnston, “When it comes to reporting, we now capture the wide range of data that we need—from client demographics all the way to the particular type of crop that a client grows, such as soybeans or cotton—so that we can see where the money is going.”

Having met its need for increased accountability, the LSU AgCenter is now eyeing new possibilities with Microsoft Dynamics CRM. In future work, the organization will add the ability to perform evaluations of outreach programs through the system. Through program evaluations, agents will be able to follow up with people, such as those they have worked with through a nutrition program, to see if there has been any measurable impact on their overall health. The center is also considering the use of Microsoft Dynamics CRM to handle the tracking of proposals for grants and the related approval workflow for such proposals as they move to the Sponsored Programs office for review. In addition, the LSU AgCenter is planning to expand its deployment to include the research side of its organization, for example, to track cattle and related cattle research activities to ensure those activities comply with animal-research regulations.

## Benefits

With Microsoft Dynamics CRM in place, the LSU AgCenter now supports all outreach efforts on a single system and has greatly improved its ability to provide government reporting. In addition to being able to improve its accountability, the organization has enhanced insight into the organization and clients alike and has achieved that while easing IT development and support.

“Aside from the initial design work we did with our partner, it has only taken the time of one-and-a-half staff members to customize the solution and one-half a person to create business processes for an organization with more than 400 users.”

Sarah Johnston, IT Manager, Louisiana State University Agricultural Center

#### **Improve Reporting and Accountability**

With all outreach program work now captured in a single system, and recorded regularly and in detail, the LSU AgCenter can provide accurate reporting to its local and federal funding sources on an as-needed basis. Says Johnston, “While the state has undergone budget cuts, we have taken advantage of Microsoft Dynamics CRM to dramatically improve the accountability that we need to justify our spending and secure more funding when the economy improves.”

Johnston adds, “Because we can now report on our organization in real time and do so in a high level of detail, we can make a much stronger case for our services and improve our competitiveness for more opportunities.”

In terms of timesavings, Johnston expects the organization to be able to reduce the time to do federal reporting from as many as six weeks to only one week—a number that will only further improve as the organization continues to roll out new process improvements with Microsoft Dynamics CRM.

#### **Enhance Organization and Constituent Insight**

Having access to comprehensive organizational data, the LSU AgCenter also has better insight into its own operations. And by going from a system where each customer touch point was recorded separately to one where they are all recorded under the same contact, the LSU AgCenter has greatly improved insight into clients as well. “Managers can see what their agents are working on, and perhaps more importantly, we are now building useful profiles of the people we reach out to,” says Johnston. “Because of that, we can establish a more proactive business model wherein we truly understand our clients

and can engage with them on a more personal basis.”

Additionally, LSU AgCenter expects that as it integrates its outreach evaluation models into the reporting process, it will be able to quantify the results of such efforts. For example, if a particular farming technique results in a 5 percent yield according to research and agents work with producers to train them on that technique, then the organization can calculate the acreage of the producers who implemented that technique and attach a dollar value that represents increased production to that outreach effort.

#### **Ease IT Development and Support**

Switching from custom development to tailoring Microsoft Dynamics CRM has also proven to be a wise decision for the LSU AgCenter IT team. Says Johnston, “Aside from the initial design work we did with our partner, it has only taken the time of one-and-a-half staff members to customize the solution and one-half a person to create business processes for an organization with more than 400 users. And now that we’re live, the time to support it has dropped to only one full-time employee.”

#### **Additional Resources**

- [Try a free 30-day trial of Microsoft Dynamics CRM.](#)
- [Learn more about extended CRM.](#)

## For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers in the United States and Canada who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to:

[www.microsoft.com](http://www.microsoft.com)

For more information about Louisiana State University Agricultural Center products and services, call (225) 578-4161 or visit the website at:

[www.lsuagcenter.com](http://www.lsuagcenter.com)

For more information about CoeSolutions products and services, call (225) 293-8686 or visit the website at:

[www.coesolutions.com](http://www.coesolutions.com)

## Microsoft Dynamics

Microsoft Dynamics CRM is a complete solution that gives you a 360-degree view of your constituents' needs—from first contact through service fulfillment. Fast, flexible, and affordable, Microsoft Dynamics CRM streamlines important tasks, such as constituent services, grant writing, field inspections, investigation management, case management, call-center management, campus information sharing, emergency response, and much more.

Organizations realize higher levels of efficiency with improved workflow tools that enable cross-departmental collaboration and productivity. In addition to the core functionality available out-of-the-box, Microsoft Dynamics CRM is a robust development platform to develop applications to meet the processes and needs of your organization and the departments within it.

For more information about Microsoft Dynamics, go to:

[www.microsoft.com/dynamics](http://www.microsoft.com/dynamics)

### Software and Services

- Microsoft Dynamics
  - Microsoft Dynamics CRM

### Partners

- CoeSolutions