



## Proposal Management System



### Proposal Management System

#### The Summary

Client wanted to achieve enhanced efficiency and productivity through Proposal Management System which they are using during their fund raising campaign. AG Technologies developed the document management system to better organize and track prospects, document templates and best practices, and streamline the internal processes.

#### The Client

The client is based in US and one of the top academic and research institutions in the world, conducting path breaking research in medicine, science, the arts, and the humanities. It includes three undergraduate schools, thirteen graduate and professional schools, and a school of continuing education.

The client seeks to attract a diverse and international faculty and student body, to support research and teaching on global issues, and to create academic relationships with many countries and regions. It expects all its areas to advance knowledge and learning at the highest level and to convey the products of its efforts to the world.

#### The Business Requirement

The client approaches various institutions and individuals for donation as part of their fund raising campaign. There is a process driven effort involved in making proposals to prospects and Volunteer handbook which is distributed to the prospects.

Currently the team uses a combination of paper and electronic files to develop proposals, Volunteer Handbook and track activities etc. Their requirement was as follows:-

1. The client required a process where the team could collaborate more efficiently and use the document management capabilities of SharePoint to better organize and track prospects, document templates and best practices, and streamline the internal processes.
2. They also wanted the whole process of review and approval of handbook creation along with maintaining repository for all its updated versions to be automated

#### Project Summary

**Industry:** Education and Training

#### Client Profile:

The client is one of the top academic and research institutions in the world, conducting path breaking research in medicine, science, the arts, and the humanities.

#### Business Requirement:

The client wants to maintain a centralized repository for various templates they use and automate the whole process.

#### Solution Benefit:

- Increase efficiency of document development
- Easy search and reuse of content
- Organize and formalize data management
- Increase communication
- Reduce the amount of papers work.



## The Solution

AG Technologies using SharePoint developed a solution which defines the following path:

### 1. Proposal Management and Gift agreement creation

SharePoint will be used as centralized repository for different templates such as Introductory Letters, Thank you Letters, Gift Agreements, Briefing, Stewardship letters etc.

### 2. Volunteer handbook development process

SharePoint will be used for handbook collaboration between MG Team with managing the different version. The review and approval process will be automated using the workflow of SharePoint. SharePoint will be used as centralized repository for all the versions of Volunteer Handbook as well as their sections for reference purpose.

### 3. Analyze the briefing process

As part of the pilot, AG tech will only analyze the briefing process and evaluate the possibilities of integration with sources (e.g. Advance) for briefing creation as well as updating the briefing back into the Advance.

### 4. Email Integration

SharePoint will use the MS Exchange email server of CU IT for notification purpose. All the review and approval tasks assigned to users will be notified using the Email with link to specific document

### 5. Search

SharePoint will be used as centralized repository for different document and templates created by MG Team. SharePoint has state of the art search capabilities using which team members can search documents, templates and use them as references.

## Technology and Tools:

- MOSS 2007
- Microsoft SQL Server 2005
- Microsoft Windows Server 2003

## The Solution Benefit

- Increase efficiency of document development



- Easy search and reuse of content
- Identify and codify best practices
- Organize and formalize data management (Records Management)
- Increase communication within the team and with the rest of the campus
- Reduce the amount of paper work.