

CASE STUDY

A nonprofit's mission is only as strong as its ability to execute on it.

When intake is in spreadsheets, follow-up is in email, and no one has a complete view of a client's journey, people fall through the cracks. Homeward Bound came to Armely to fix that.

Does this describe your organization?

- Client intake lives in spreadsheets that different staff maintain differently
- Case managers can't see what happened with a client before they got involved
- Funder reports take days to assemble from multiple disconnected sources
- Leadership has no real-time view of program performance or capacity
- New staff take months to learn informal processes that aren't documented anywhere
- Follow-up falls through the cracks because no system tracks what's due

What Armely built for Homeward Bound

Homeward Bound is a nonprofit organization providing housing, supportive services, and resources to people experiencing homelessness. Managing client journeys across multiple programs and locations required a platform built for their complexity.

Armely implemented Microsoft Dynamics 365 to unify client intake, case management, program tracking, and reporting. Staff now work from a single system that guides every interaction, connects every record, and surfaces what each client needs next.

Before	After
Client intake tracked across spreadsheets, email, and disconnected databases	Unified Dynamics 365 environment for intake, case management, and client records
Staff spent hours on manual coordination and duplicate data entry	Automated workflows reduce manual work and eliminate duplicate entry
No visibility across programs or locations into client status	Real-time dashboards give leadership visibility across all programs
Reporting to funders required manual data assembly each cycle	Funder reports generated directly from live system data
New staff learned processes informally with no system to guide them	Standardized intake forms and workflows in D365 guide every interaction
Document storage disconnected from client records	SharePoint integration connects documents directly to client records

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