Tribal Government Adopts Modern CRM Software to Accelerate Member Services

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Dustin Stark, IT Director, Choctaw Nation

Business Needs

The Choctaw Nation of Oklahoma is the country's third-largest Native American tribe. Based in Durant, Oklahoma, it is also southeast Oklahoma's largest employer, with more than 6,000 employees. Looking to the future, the tribe is working on a 100-year plan to ensure the success of the Choctaw people for many generations to come.

Its citizen registry tracks tribal members, voter registration status, and services including emergency services, public safety, education, and other social services. To enroll members and track membership status and details, Choctaw Nation used membership management software created for small organizations. However, it could no longer handle the capacity required for the more than 200,000 Choctaw Nation tribal members worldwide. The tribe faced these issues:

- **Slow service.** Members experienced delays and long wait times. Because of the way the system performed searches for data, responsiveness was painstakingly slow.
- **Delayed decisions.** The membership department provides periodic reports on census-type data such as births and new member enrollments. It also fulfills requests for custom reports from external agencies and other tribal departments for grant development, capacity planning, and other purposes. Melissa Jones, Director of the Tribal Membership Department at Choctaw Nation, explains, "Ad-hoc reports required custom queries and, typically, assistance from a consultant. Extremely lengthy processing times tended to slow down everything, including decisions."
- **Legacy software that was difficult to manage and use.** The software was unable to adapt to changing business requirements. Says Dustin Stark, IT Director at the Choctaw Nation, "Our internal developers found it difficult to modify the code for even basic changes. We needed a solution that would be more adaptable, enabling our internal staff to make minor modifications."

To further help the tribe support the success of its people, leaders envisioned a centralized solution for consolidating and accessing member information. "Based on past experience, we knew that integrating information from various departments with our existing membership management software would have been significantly more difficult and costly than we were willing to face," remarks Stark.

Solution

After considering a variety of software products, Choctaw Nation selected Microsoft Dynamics CRM. The tribal IT department worked with Microsoft partner Arctic IT to implement it on-premises. Arctic IT is a systems integrator and has a gold competency in Customer Relationship Management.

Even though Microsoft Dynamics CRM 2011 was available, the team decided to first deploy Microsoft Dynamics CRM 4.0. During the deployment, Arctic IT trained tribal IT staff on the technology so that they could later extend it into new areas and tailor the software with as little help as possible from a third party. This hands-on training equipped tribal IT to subsequently perform a very smooth upgrade to Microsoft Dynamics CRM 2011.

"Arctic IT's expertise in how tribal governments work and the ability of Microsoft Dynamics CRM to support our unique requirements gave us a huge amount of assurance that we would have success," says Stark.

Benefits

By using Microsoft Dynamics CRM, the Choctaw Nation membership department has the solution it needs to improve service and its IT department can independently tailor and manage it. Says Stark, "Microsoft Dynamics CRM is now a pivotal element in our 100-year plan to ensure the success of the Choctaw people."

Reliable Tribal Information System

With the performance and reliability of Microsoft Dynamics CRM, Choctaw Nation is now much more comfortable with its membership management solution. "I know that we made the right choice for our system," says Stark. "We know that Microsoft will continue to innovate and support its CRM software. With other

Fast Facts		
	Legacy membership application	**Microsoft Dynamics CRM**
Time required to create reports	About 3 hours	Less than an hour; in some cases, just a few minutes
Lengthiest report to run	15 minutes	2 minutes
Running other reports	Varied, up to several minutes	Seconds

providers, that may have been a real concern."

Support for Compliance

By taking advantage of specific features in Microsoft Dynamics CRM, Choctaw Nation now automates and tracks the process of registering members with the Federal Bureau of Indian Affairs. "We use the solution to standardize the workflow and produce the documentation in the format the bureau requires, which really helps improve the registration process," states Jones.

Better, Faster Member Service

With a system that is more responsive, the Choctaw Nation membership department can now serve members more quickly. One manually intensive enrollment step used to require the use of a typewriter and digital scanner. The new membership management solution automates and vastly streamlines this process, displaying all the needed information in a single screen, saving almost 10 minutes per family member.

The user interface also contributes to better member service and a low learning curve. "The user screens have such a clean, user-friendly appearance that everyone quickly learned their way through the application," says Jones. "Everything goes much more smoothly and quickly with Microsoft Dynamics CRM. We can support ad-hoc queries by using the Advanced

Find feature in Microsoft Dynamics CRM, and we seldom call on IT for help."

Adaptable Solution That IT Can Tailor and Administer

Since going live with Microsoft Dynamics CRM 2011 in March 2011, Choctaw Nation IT staff have handled minor changes. "With minimal time investment, our own staff can configure and tailor the solution to fit our needs," notes Stark. "In fact, we gain a lot of independence and flexibility with Microsoft Dynamics CRM. If we eventually need support, we aren't locked into a single provider."

Foundation for a Central Membership Repository

Choctaw Nation carries a vision for developing a central repository for information related to its members. Says Stark, "My hope is to consolidate, in one place, all the data our Chief and other leaders need to make the best decisions possible for the good of the tribe. For example, we might foresee an increase in the need for energy assistance, which would improve budgeting and planning. By using Microsoft Dynamics CRM, we can see various relationships in a single view; now, we need to work on connecting the databases that will better inform it." With plans to soon roll it out to a set of social services, Stark says, "I see Microsoft Dynamics CRM as the software of choice to help the tribe realize our full membership services vision."

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