



# GIFTS

## CONSULTING SERVICES

### OPTIMIZATION ANALYSIS

#### Benefits

► **Efficiency**

Let GIFTS do the work for you!

► **Experienced Professionals**

Leverage our in-depth product knowledge to create the best solutions for your organization

► **Data Integrity**

Ensure your system is accurate and up-to-date

#### Cost

Two days @  
\$1600 per day

#### Contact Us

### Optimized Products Lower Total Cost of Ownership

A key advantage of working directly with MicroEdge product specialists: We know our product better than anyone else. That means we are uniquely qualified to analyze your GIFTS system, and optimize it for your workflow and operations. As a result, you reap the rewards of increased efficiency, which enables you to dedicate your staff to other activities. These benefits not only reduce your overhead, they lower the total cost of ownership of your system and increase the return on your technology investment.

### Service Description:

Our Optimization Analysis Service is designed to help you get the most from your technology investment and improve your operational efficiency. A MicroEdge product specialist will work directly with your staff to conduct an on-site review of your grant-making operation, examine your current usage of GIFTS, identify bottlenecks and problem areas, and help you optimize the features and power of GIFTS. After establishing the guidelines for streamlining your processes, we can also design training sessions to align staff with your new procedures.

### What Will be Covered:

We focus on five key areas of your grants management process and your use of GIFTS: Grant Making Process, Coding Structure, Reporting, Correspondence and Data Integrity.

### Grant Making Process

The product specialist will analyze your giving programs and current workflow to optimize how requests are handled – from the point of receipt, to approval or declination, to the conclusion of your grant management cycle. The product specialist will identify the bottlenecks and problem areas of your GIFTS system.

### Coding Structure

The product specialist will analyze your current reporting needs with you to ensure the appropriate classifications (coding tables) are being used. Once the requirements for your coding tables are identified, we will assist you with modifying, creating, replacing, and transferring your codes.

### Reporting

The product specialist will review the reports you currently use for daily, weekly, monthly, and yearly reporting and make recommendation on the most efficient way to create these reports. The product specialist will also assist you with creating report templates using Saved Search and Saved Views and will give you the tools necessary for creating future reports on your own.

### Correspondence

After reviewing and refining your workflow, the product specialist will review your correspondence templates to ensure all the necessary information is being captured for automated emails, letters, and write-ups. The product specialist will analyze your current Template Library to ensure that the templates are technically sound.

### Data Integrity

The product specialist will look over the data in your GIFTS system. They will run various queries to identify duplicate entries that could compromise data integrity and will assist you with consolidating duplicate records. The product specialist will evaluate the health of your database and determine a proper course of action for fixing and preventing data corruption.

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