



SUCCESS STORY DEEP DIVE

iCatalyst helps domestic and family violence service provider simplify reporting and strengthen client care with Microsoft Dynamics 365

Every day, domestic and family violence organisations help people navigate some of the most challenging periods of their lives. From crisis response and court support to long-term healing and recovery, frontline teams rely on timely access to accurate information to deliver safe, coordinated care.

For one Queensland-based domestic and family violence service provider, those responsibilities were becoming increasingly difficult to manage. As the organisation expanded its crisis support, court support, police station outreach, and healing and recovery services, its existing case management system struggled to keep pace. Reporting became slow and unreliable, staff relied on manual workarounds to capture critical information, and even minor system changes required external developer support.

Looking for a more sustainable solution, the organisation partnered with Beyond CRM to implement a purpose-built case

management platform built on Microsoft Dynamics 365 and Microsoft Power Platform. Today, the organisation has greater visibility across its services, dramatically simplified reporting, improved day-to-day efficiency, and a secure, scalable platform that continues to evolve alongside its needs.

Following iCatalyst's acquisition of Beyond CRM, the domestic and family violence service provider continues to benefit from the same experienced consultants and sector knowledge, now backed by iCatalyst's broader capability and Microsoft AI Business solutions expertise.

The organisation's program manager said, "Knowing the platform had already been built for domestic and family violence services gave us confidence from the beginning. It already reflected much of the way we worked, and iCatalyst helped tailor it to our organisation."

OUTGROWING A SYSTEM THAT COULD NO LONGER KEEP PACE

As the organisation expanded its services and reporting obligations, its existing case management platform could no longer keep pace with the way teams worked.

As demand for services grew, so too did the need for timely reporting, flexible case management, and reliable access to client information. However, the organisation's existing system struggled to support these increasing demands. Large reports regularly slowed or crashed the platform, routine configuration changes required external developer support, and staff often relied on manual workarounds to capture information essential to service delivery.

"If we tried to run any large reports, our whole system would slow down or crash. It wasn't purpose-built for domestic and family violence services, so we had to use a lot of workarounds to record the data that was useful to us," said the program manager.

Rather than driving better service delivery, the platform had become a barrier to productivity. The organisation needed a solution that could evolve alongside its services while giving staff greater control over the information they relied on every day.

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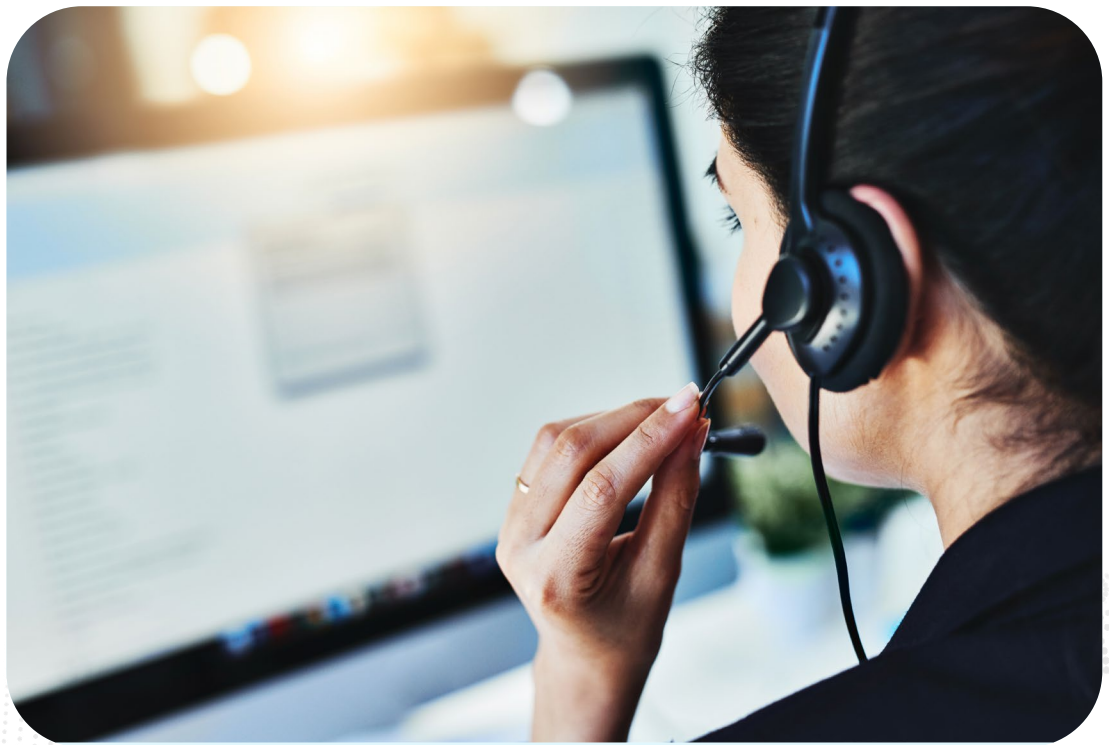
BUILDING ON THE STRENGTH OF MICROSOFT TECHNOLOGY

The organisation was introduced to iCatalyst through another domestic and family violence service already using iCatalyst's Microsoft Dynamics 365 solution. This recommendation immediately stood out because the platform had been designed specifically for organisations operating in the sector.

Rather than ask the organisation to adapt its processes to a standard CRM, iCatalyst configured Microsoft Dynamics 365 around the way the organisation already worked. Existing programs, funding streams, reporting obligations, and assessment frameworks all informed the solution's design, creating a platform that reflected real operational workflows rather than generic sales processes.

Through a structured discovery process, iCatalyst worked closely with the organisation to understand how teams delivered services, the information they needed to capture, and the government reporting frameworks they worked within. The implementation included configurable risk and needs assessments, secure case management, Microsoft Outlook integration, Microsoft SharePoint document management, and Microsoft Power BI reporting.

"Out-of-the-box solutions simply weren't meeting the needs of domestic and family violence organisations. iCatalyst needed to build on Microsoft Dynamics 365 in a way that reflected how these services operate," said Chris Maddern, SMB Engagement Lead at iCatalyst



TRANSFORMING REPORTING WITH MICROSOFT POWER BI

Access to timely, accurate information is essential for community organisations responsible for delivering government-funded programs. Whether reporting to funding bodies or answering operational questions, staff need to retrieve information quickly and confidently.

The organisation regularly reports on client numbers, demographics, service delivery, program outcomes, and funding performance. Under its previous system, producing these reports was slow and resource intensive, often disrupting other users and delaying access to critical information.

With Microsoft Power BI, reporting has become faster, more flexible, and significantly easier to manage.

“Reporting through Power BI has been one of the biggest improvements. Being able to get our numbers together quickly for quarterly reporting has been amazing,” said the program manager.

The benefits extend well beyond scheduled reporting. Staff can now retrieve information for individual programs, funding streams, and client cohorts without relying on external developers or manually compiling reports. The team can now directly answer questions that once required technical support.

Microsoft Power BI has transformed reporting from an administrative task into a valuable operational tool, giving staff faster access to meaningful insights while reducing the time spent preparing information for funding bodies.

“ Being able to get our numbers together quickly for quarterly reporting has been amazing”

GIVING STAFF GREATER CONTROL THROUGH MICROSOFT DYNAMICS 365

Beyond improving reporting, Microsoft Dynamics 365 has given staff greater control over the way they manage information, maintain the system, and support clients every day.

Staff can now manage many configuration changes internally, including updating program information and maintaining dropdown lists, reducing reliance on external development support.

Integrated Microsoft Outlook email tracking has removed the need to manually copy correspondence into individual client records, while Microsoft SharePoint provides a more intuitive way to manage supporting documentation.

“Being able to track our emails has been game changing. Previously, we had to copy and paste every email into a client’s notes. Now it’s all there automatically,” said the program manager.

“ Being able to track our emails has been game changing.”

Risk and needs assessments have also been transformed. Previously completed using lengthy Word documents that were manually uploaded and difficult to navigate, assessments are now captured directly within the system, making information easier to complete, access and manage.

PROTECTING SENSITIVE INFORMATION WITH MICROSOFT’S SECURITY FRAMEWORK

Supporting people experiencing domestic and family violence requires more than operational efficiency. It requires complete confidence that sensitive information is protected.

Built on Microsoft’s enterprise-grade security framework, the solution provides role-based access controls, comprehensive auditing, and record traceability, helping organisations understand who has accessed information, when it was accessed, and what actions were performed. Microsoft Defender and Microsoft Purview further strengthen governance and compliance by supporting security auditing and monitoring.

iCatalyst also adapted standard Microsoft Dynamics 365 functionality to better suit the needs of domestic and family violence organisations. For example, standard CRM behaviours that could introduce unnecessary communication risks were redesigned to better protect vulnerable service users.

By combining Microsoft’s security capabilities with deep sector expertise, iCatalyst delivered a solution that balances accessibility for frontline teams with the robust governance required for highly sensitive client information.



INVESTING IN BETTER OUTCOMES

For many not-for-profit organisations, investing in a new platform requires careful consideration, and this organisation was no different. Importantly, the long-term benefits delivered by the iCatalyst solution have extended well beyond simply replacing an ageing system.

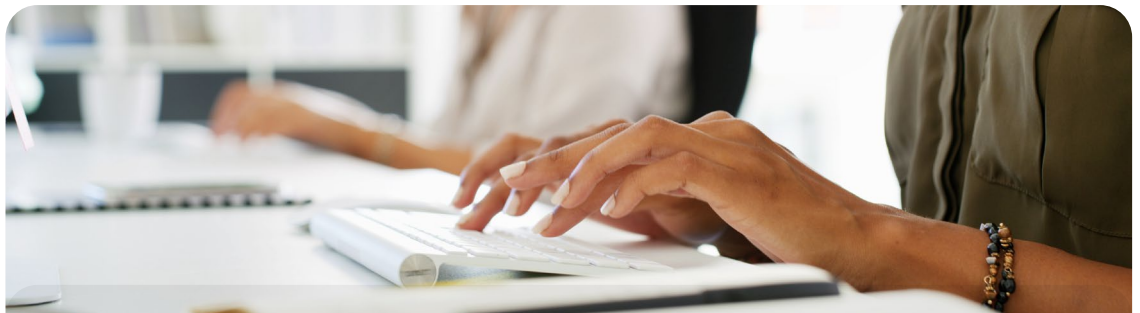
Specifically, Microsoft Dynamics 365 and Microsoft Power Platform have provided a secure, scalable foundation for future growth, while iCatalyst's sector expertise means the organisation can reduce administration, simplify reporting, and give staff greater control over the information they rely on every day.

"Finding the funding to make the change was the biggest challenge. Looking back, it's saved us more than that in the long run because we're no longer paying someone just to access or customise our own data," said the program manager.

As demand for domestic and family violence services continues to grow, the organisation now has confidence that its Microsoft platform, and its partnership with iCatalyst, can continue evolving to support both its staff and the communities it serves.

SOLUTIONS AND SERVICES DELIVERED

- Microsoft Dynamics 365
- Microsoft Power Platform
- Microsoft Power BI
- Microsoft SharePoint
- Microsoft Outlook integration
- purpose-built case management for domestic and family violence services
- configurable risk and needs assessments
- ongoing support, user training, and solution enhancement.



FEATURED CUSTOMER – DOMESTIC AND FAMILY VIOLENCE SERVICE PROVIDER

A Queensland-based not-for-profit organisation provides domestic and family violence support services to individuals and families across metropolitan and regional communities.

Its multidisciplinary teams deliver crisis support, court support, police station outreach, and healing and recovery programs for women, children, and families, while working closely with government agencies and community partners to improve safety and long-term wellbeing.

Contact our team today.

Contact us

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