

## ENSURING PROJECTS A FOLLOW-UP



The EDF Foundation has been supporting projects for 30 years.

The Foundation acts in favour of community and social issues through 3 priorities: social inclusion, autonomy, humanitarian aid.

EDF foundation needed a one-top solution to be able to:

- Handle the flow of requests
- Sort the projects by theme
- Ensure an efficient follow-up

### HOW DID WE HELP SOLVING ISSUES?

- ✓ All the requests are collected through a **single entry point**. A tailor-made form is filled in to provide a project description, an evaluation submitted by different parties.
- ✓ All the **requests** received by email are **transferred** to the Optimy Solution via a dropbox email address.
- ✓ Incoming **requests are filtered** based on pre-defined criteria.
- ✓ Projects submitted are **directly routed** by program to the dashboard of the concerned program manager for review.
- ✓ Each program manager can follow all activities from a **single dashboard**.
- ✓ A **PDF** of each project is **generated** with key information: the association supported, the partners, the budget etc.
- ✓ **All documents** attached to each project are efficiently **stored**: letters, publications, agreements, budget plan, etc.
- ✓ **Systematic and personalised emails** are sent to the project owner at each step of the process for every project.
- ✓ Throughout the project length, **internal extra fields** are used to share information between the users.
- ✓ Each project is **directly assessed** by the program manager via the **statuses**.
- ✓ Users can easily generate **tailor-made and up-to-date reports**: number of incoming requests, number of projects by theme, etc.

### ABOUT OPTIMY

50%

TIME SAVED

150+

ORGANISATIONS

98%+

RETENTION RATE



«The Optimy software is the right solution for streamlining the request submission, we therefore operate with greater effectiveness by speeding up our procedures. And now, we can also manage projects overtime.»

Nils Pedersen, Philanthropy Manager, EDF Foundation

REQUEST A DEMO