Case Study : Swiss Red Cross

HOW SWISS RED CROSS STREAMLINED WORKFLOWS AND IMPROVED EFFICIENCY IN ITS HEAD OFFICE

The challenge
Swiss Red Cross staff were swamped with documents and time-consuming workflows involving lots of emailing.

The solution
SRC implemented NGO Online to bring together program, project, and grant management in one integrated system, configured to their specific needs.

The outcome
Now SRC's head office and field offices work from the same system with instant access to all program documents, systematically organized. Annette can see the status of projects at a glance, and built-in workflows have cut out endless emails chasing approvals or updates. This has freed up her time and headspace to focus on the more complex parts of her role.

NGOonline
by precio fishbone

How Swiss Red Cross streamlined workflows and improved efficiency in its head office

The challenge: Complex workflows and document overload

As a program coordinator for Swiss Red Cross (SRC), Annette Vondeling oversees the operational and financial implementation of relief, recovery, and development projects in Nepal, Pakistan, and Indonesia. Designing and delivering effective projects in diverse, complex contexts with different partners involves a lot of internal collaboration and document-sharing. Annette liaises regularly with SRC's experts working at grassroots level, to ensure programs are implemented in line with SRC's and donors' quality standards.

"When starting a project – from writing a concept note, to a project proposal, to getting it agreed and implemented, to monitoring – there are many, many steps to follow. And there are many guidelines and templates to be used, and it's become more and more complex."

It was often hard for Annette and her colleagues to keep track of which was the latest version of a document, or who was currently working on it. Further issues arose when field offices sometimes used different templates to head office. And having to share all documents as email attachments clogged up staff's inboxes.

To ensure maximum efficiency and quality when delivering projects, SRC realized they needed better ways to

Annette Vondeling, Program Coordinator, Swiss Red Cross

manage document storage and sharing, and internal workflow processes.

The solution: NGO Online provides integrated program, project, and grant management systems

SRC chose NGO Online software because it offers an all-in-one solution designed specifically for large non-governmental organizations. It integrates program, project, and grant management systems, and could be configured to suit SRC's specific needs.

NGO Online was rolled out at SRC in December 2018, with training over three months for around 220 users. Introducing a whole new software system can seem daunting. However, Precio Fishbone worked closely with SRC to make the implementation and training as smooth as possible.

"Of course at the beginning of a change there's always a little bit of resistance. But we have a good SRC program manager who was responsible for liaising with Precio Fishbone for developing NGO Online for us, who's ready to help whenever needed. We received face-to-face training and they'd made some short video tutorials, and that was helpful. At the beginning it all takes longer until you get used to a new system, but once you get to know it, it's easier."

The outcome: Faster, more efficient processes transform workload management

Once the SRC staff had been trained on the new system, it transformed the ease and speed with which they can

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The outcome

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communicate with each other, share and collaborate on documents, and access vital information they need to carry out their daily tasks. The response has been over-whelmingly positive.

> **The major improvement is that we're all using the same system, the teams in the field and at head office. We're now better aware of what's needed for each step. It's a logical and systematic approach to how to manage a project. And it's much clearer now where things are filed. The resource library has all documents organized to follow our project cycle management approach and I find that very good."**

One of Annette's favourite features is the project summary function. This enables her to see at a glance the current status of projects in each country and issues needing attention. "I find it very handy that I can get a quick overview, so if I look at the Nepal page I can see what the activities and milestones are, do I have missed deadlines already, what are the high risks. I see the most important info about the project on one page. And if someone in-house asks me something about Nepal, then I can just say go to the general information on NGO Online and you can find everything there."

Having automated checklists to follow, and all templates and guidelines at her fingertips, means Annette has more time and headspace to focus on the more complex parts of her work. "It helps me in my work because I don't forget any steps, and I don't need to go and search for each template."

NGO Online's automatic workflow processes have reduced time and effort spent – not to mention emails – on sharing documents, and chasing updates and approvals. The benefits of electronic document sharing and access became even more important during the Covid-19 lock-down, with so many people working from home.

"We're not chasing paperwork any more. I'm no longer sending an email asking for someone to do this or that for an activity or milestone. And I don't need to email a document forward and backward to several people to get it approved. It's now all done through NGO Online, and that's a real added value."

To find out more about NGO Online's unique, comprehensive software solution for NGOs, get in touch:

ngoonline.net

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ABOUT

NGO Online is a cloud-based program, project and grant management IT solution specifically designed for international humanitarian and development NGOs.

NGO Online is developed by Precio Fishbone, a product and consulting company focused on SharePoint and Microsoft 365 based solutions. We have customers in Europe, Asia and North America supported by approximately 250 employees in Sweden, Denmark, United Kingdom, Canada and Vietnam.

Together with our partners, we have assisted some 1000 customers with their digital solutions.

Precio Fishbone is listed on Nasdaq Stockholm First North Premier.

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