

BAAQMD Implements Dynamics CRM with A Focus On Flexibility



A Solution for Bay Area Air Quality Management District



The Bay Area Air Quality Management District (BAAQMD) is responsible for monitoring the air quality in the greater Bay Area. The Wood Smoke Incentive Grant program is part of an ongoing challenge to maintain better air quality standards for people living within the district. BAAQMD has offered public grants ranging from \$750 to \$12,000 to dismantle or destroy existing Wood Smoke devices, including fireplaces and wood burning stoves and replace them with cleaner heating options.

To manage this grant program, BAAQMD sought alternatives to expensive single-use systems. To meet this need, TrinityTG was selected to implement their Grant solution using Microsoft Dynamics CRM online. The Wood Smoke system was constructed in just 3 months without the need for traditional custom development. The solution successfully manages the grant and permit process and can now be easily customized to handle additional Grant programs for BAAQMD. Users benefit as well, they can rely on a single, familiar interface.

BAAQMD saved significant money on this project and will continue to save as other BAAQMD Grant Incentive Programs are rolled out, making the concept of “build once reuse many times” a reality. By utilizing a shared services environment, the various departments within the air district can share the CRM solution, eliminating the need for customized solutions per department, therefore lowering the risk of implementation and increasing the realization of ROI (Return on Investment). Employees can now process grant requests with just a few clicks, drastically reducing turnaround time from grant submission to applicant notification.

Microsoft CRM and Adxstudio Portal Performance & Reliability

While the public was aware that the program would be forthcoming, BAAQMD only announced the start of the incentive program to the public the day before the official launch date. As a result, a large number of applicants applied for the grant within hours after opening. To support this expected surge and high traffic, BAAQMD and TrinityTG

made a critical decision to double the CPU cores. This was easy to execute because BAAQMD had chosen to implement this solution in the Microsoft Azure cloud. Additional capacity could be added literally in just a few hours. If demand drops after rollout, de-provisioning of resources can be implemented, significantly lowering the cost of technical ownership.

Performance scaling with Dynamics CRM and Adxstudio within the Azure cloud allowed the system to process applications throughout this peak usage. Each application required that the applicant upload at least two pictures of an existing fireplace, resulting in thousands of uploads in just the first few days. Using the Azure cloud solution, BAAQMD was able to literally go into an administration panel and add storage in a matter of minutes. No hardware had to be purchased or installed, and no lead time was required.

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- *Over 2,700 registered applicants*
 - *Over 1,970 permit applications*
 - *Over 3,940 uploads within 2 days of launch*
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Development & Ease of Maintenance

At TrinityTG, we used an Agile approach, documenting the BAAQMD user's stories, test scenarios and business rules within the same CRM tool. Through the Agile methodology approach, we validated milestones and ROI every step of the way. After the Wood Smoke CRM application went live, BAAQMD decided to reorganize 20% of the screens to further streamline their work processes. Due to the flexibility and configurability of CRM and Adxstudio, all of this was accomplished without any technical staff. Behind the scenes, Adxstudio automatically generated device responsive HTML5 code which automatically rendered the updated application.

Flexibility & User Benefits

Using CRM and Adxstudio, a program administrator from the business area can move a project through the application process using a simple dashboard so that the applicant sees updated information about their project on the public portal.

With a dynamic dashboard and configurable workflows, you can embed business logic in a UI widget and have working functionality within a few minutes, all without coding. Steps can easily be added or removed, making workflow adjustments efficient and straightforward.

Since Dynamics CRM can use values from any field in the solution with a wide variety of criteria, configuration possibilities are endless.



More User Benefits

- With CRM, TrinityTG implemented role based security to restrict application functionality for different groups of employees, giving access to those who need it when they need it while avoiding the potential for security compromises.
- Password recovery and user maintenance are provided in a completely self-service mode, immediately out of the box, eliminating the need for custom coding and the expertise it requires.
- Another benefit is the ability to use a custom domain, unique to each client like BAAQMD. The custom URL helps reassure the applicant that they are providing their information to the appropriate authority.

Adxstudio Portal Technology Investment

Adxstudio Portal and Dynamics CRM provide an excellent platform for building web applications. With its modular open infrastructure, Dynamics CRM is more customizable out of the box than other platforms and can be configured by business users. The use of the CRM online deployment model enabled BAAQMD to reduce the burden of maintenance on its IT resources and streamline the overall permit intake process while providing a better user experience. TrinityTG consistently delivers enterprise solutions by offering powerful functionality without the pain and expense of a traditional SDLC implementation.

Trinity Technology Group

Trinity Technology Group has been building working IT solutions that solve real business problems for over 15 years in Sacramento. Our team of talented professionals – from business analysts to seasoned developers, quality assurance analysts to project managers – work hand-in-hand with you to create formal plans for each critical process and to deliver the solution your department needs.