



Long-term Grant Projects Can Be Easily Organized with eWay-CRM

GRANTEX is a European firm helping businesses with grant writing. Over the years, their services have expanded to include accounting, payroll and tax consulting, legal services, auditing, and insurance. Their projects require systematic organization, and it was difficult to keep them in order. Until they started using eWay-CRM.

The initiator of the implementation of the new CRM software was the grants division, where it usually takes several years to close projects. Keeping track of deadlines and communication is crucial for success in such long-term projects. Without a suitable tool, this is very complicated in a large team.

Thanks to eWay-CRM, GRANTEX has automated projects so that grant specialists do not have to monitor deadlines manually, everyone knows the status of the project, what needs to be done, etc. Today, after more than 3 years of using eWay-CRM, none of the staff would go back to using Excel.

GRANTEX saves its clients almost a billion

At the very beginning, in 2012, GRANTEX specialized only in grant writing. Since then, their specialists have helped more than 1,700 projects obtain more than \$800 million in grants. Today, GRANTEX can save its clients more than \$10 million a year.

After its success in grant writing, it is not surprising that GRANTEX has grown to include other divisions and provide additional services. But behind success, there is always a lot of effort, and it pays to prepare for the company's future growth. For example, with a suitable software tool that can simplify the organization.



Team collaboration is complicated with Excel

Successful closure of grant projects usually takes several years and is often organizationally demanding. When communicating with grant providers, grant specialists must meet deadlines and maintain documentation.

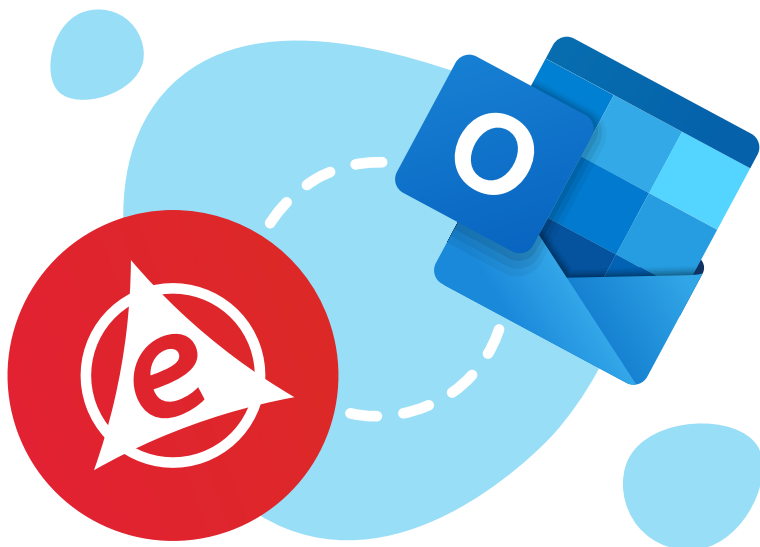
Before GRANTEX was interested in acquiring CRM software, they used to manage projects in Microsoft Excel. Its undeniable advantage is its ease of use. Most new employees already know how to use it.

Despite their efforts to make the setup as efficient as possible, GRANTEX soon realized that Excel was holding them back. Increasingly, employees were unable to share information effectively, which sometimes hurt communication with clients. This is where the impulse to look for a new CRM eventually came from, as the team needed to have information available in one place so that everyone was able to access it at the same time.

The integration of eWay-CRM with Outlook is essential

Although Excel did not prove to be a perfect project management tool at GRANTEX, the company is a satisfied user of Microsoft 365. So, one of the key aspects of selecting eWay-CRM was that the system works as a natural part of Outlook. This means that

employees work in the environment they are used to and do not have to switch between different applications.



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We are used to the Microsoft 365 office suite, and when the opportunity came up to integrate it with the CRM system, eWay-CRM gained a huge advantage over the other systems we were choosing from.

Ondrej Horcicka,
partner and head of
the grants division at GRANTEX

However, employees do not always work in the office, so GRANTEX also appreciated eWay-CRM web and mobile apps, thanks to which they can work from anywhere - from home, on the road, or at a client meeting.

eWay-CRM covers the entire life cycle of GRANTEX projects

To better help employees manage grant projects, the team decided to make major modifications to the module Projects. The idea was to accommodate 10 custom workflows set up for specific types of grant proposals. But after continuous testing, it became clear that 4 universal workflow types would serve the needs of all grant projects best. One type for each stage of a grant project's life cycle. Employees can thus immediately see the status of each project.



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Projects help us keep track of deadlines and manage tasks.

Ondrej Horcicka,
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Projects in eWay-CRM help GRANTEX to keep track of deadlines, manage tasks and project budgets, or plan staff time resources. As a result, they now have the basis for making informed decisions about whether they can accept a new contract, whether they can promise a delivery date, or whether they need to hire new colleagues.



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Thanks to this data, we are now able to evaluate quotations much more accurately, estimate the capacity of our employees, and thus decide whether we can afford to accept a given order, whether we can promise a client a delivery date, or whether we need to hire new colleagues.



CRM is key to unlocking business growth potential

Microsoft Excel limited GRANTEX in sharing information and did not offer automation options, such as reminders of important deadlines, when processing grant projects. It was only eWay-CRM that made the company's growth manageable organizationally. And it offers great potential for future development as well.

According to the company's partner and head of the grants division, Ondrej Horcicka, the most recent improvement is the integration of their website with eWay-CRM. Thanks to this, entries from the web form are automatically converted into deals in eWay-CRM. The integration also enables more efficient tracking and evaluation of marketing data in Google Analytics.

There are many more planned improvements. GRANTEX aims to automate company processes as much as possible. There is still a long way to go. But it is already clear that eWay-CRM has helped GRANTEX manage its growth organizationally.