

Driving Efficiency in Crisis Care with Microsoft Power Platform

Solari Crisis & Human Services is an award-winning, non-profit organization dedicated to helping individuals experiencing crisis situations. Their services include mental health support and crisis intervention, notably operating the 988 Suicide and Crisis Line across multiple states. Their mission is to assist individuals with immediate crisis response services and find long-term solutions through their Crisis Response Network and Community Support Network programs. Solari has recently undergone significant growth and expects to secure additional state contracts, enabling them to serve a wider range of communities.

Solari initially partnered with Compass365 in 2020 to assess and recommend a migration path for their SharePoint 2013 environment. This partnership has grown stronger over the years, and in 2023, the two organizations collaborated to modernize Solari's HR onboarding process, leveraging Microsoft Power Platform to build a comprehensive HR onboarding and offboarding solution.

THE CHALLENGE

Solari's previous onboarding/offboarding process was manual and relied on a SharePoint form and email task lists. This approach was cumbersome and required substantial follow-up to ensure task completion. Solari has grown from around 200 employees in 2020 to a current workforce of over 800 in 2024. Additionally, the organization frequently hires for project-specific needs, adding surges in onboarding and offboarding demands. With Solari's rapid growth, managing the onboarding and offboarding process became even more complex.

To address these challenges, Solari engaged Compass365 to work collaboratively with their HR and IT teams. The partnership aimed to create a scalable and efficient system to meet Solari's current and future needs.

SUCCESS METRICS

1. Modernized an outdated onboarding/offboarding process to improve efficiency and speed.
2. Created a user-friendly Microsoft Power App solution requiring minimal training for new users.
3. Leveraged Microsoft 365 tools that Solari already owned to minimize costs.

INDUSTRY

Non-Profit - Crisis and Human Services

PLATFORMS AND SOLUTIONS

- Microsoft 365
- Power Apps
- SharePoint

"Compass365's communication was great. They were really responsive. This allowed us to make changes quickly."

Laura Balis, Project Manager, IT,
Solaria Crisis & Human Services

ABOUT COMPASS365

Compass365, a Microsoft Solutions Partner, combines our years of Microsoft expertise with proven methods to improve the way companies work, operate, and confidently get value from their Microsoft investments.

THE INVESTIGATION

During the discovery phase, Solari outlined their current processes and identified pain points, such as the variety of roles they hire for and the lack of visibility into the current process. Compass365 recommended a job-description-template approach. This involved creating customizable templates based on the role, with automated notifications for each task, a dashboard for tracking progress, and a central repository for all onboarding and offboarding workflows. This approach would allow Solari's HR team to add new positions and workflows easily as the organization continued to grow.

Solari also wanted to leverage Microsoft 365 tools like SharePoint and Power Platform to maximize their existing Microsoft investment.

THE SOLUTION

Compass365 and Solari developed "PEOPLink," a Power App solution designed to streamline onboarding and offboarding processes. When an offer is extended, HR staff selects the appropriate position from the template library within PEOPLink, and a corresponding set of tasks is automatically generated. Notifications are sent to relevant departments, such as IT, Finance, and Billing, ensuring everyone involved is aware of their responsibilities. Reminders are also sent as needed, and HR staff have access to a dashboard showing the status of all active processes and outstanding tasks. The offboarding process follows a similar workflow.

The PEOPLink app is user-friendly, with minimal training needed. This eased the adoption across departments and contributed to high satisfaction rates. It has greatly improved visibility and tracking for all departments involved in the onboarding/offboarding process and has provided centralized access for HR and IT to manage and monitor progress across touchpoints.

The project took roughly six months to complete (September 2023 – April 2024), including time for user acceptance testing (UAT), deployment, and knowledge-transfer sessions. The close collaboration between

Solari and Compass365 was instrumental in creating a solution that met Solari's needs, with an emphasis on accessibility and improved user experience.

"The Compass team did a good job of asking us the questions that we never thought of. That helped, I believe, make the solution better."

Mark Griffiths, Chief Information Officer,
Solaria Crisis & Human Services

The Power App solution has enabled Solari to meet the growing demand for their critical services. In June 2024, Solari was chosen to manage the suicide and crisis lines for the state of Colorado, which required onboarding over 180 employees within two months. Compass365 is honored to have supported Solari's growth, providing them with a flexible and scalable solution that meets their unique needs.

The PEOPLink app provided a user-friendly, efficient solution to support Solari's HR needs and enabled the organization to focus on their mission of delivering critical crisis and human services. The strong communication and collaboration between Compass365 and Solari laid a foundation for future projects that can further enhance Solari's capabilities as they continue to expand.

"Feedback from every department involved has been positive. HR appreciates the central interface to track and manage everything in one place, and the IT team is thrilled to have a single system to monitor all hardware assets, ensuring everyone knows each step and touchpoint in the process."

Nathan Hearn, Senior Director, Business Intelligence,
Solaria Crisis & Human Services