



## Customer Story

### Coast Mental Health

Nonprofit



# Transforming Operational Efficiency and Data Integration for Coast Mental Health



## Customer Profile

Coast Mental Health is a non-profit and registered charity based in Vancouver, British Columbia, serving people living with mental illness since 1972. Their mission centers on supporting, advocating for, and promoting recovery through a comprehensive, person-centered approach that emphasizes hope, compassion, courage, respect, and collaboration. They operate 52 facilities and manage over 1,400 homes, making them one of Canada's largest non-profit housing providers for people with mental illness.

## Goals

- Improved Data Consistency
- Enhanced Operational Efficiency
- Scalable Growth
- Empowered & Trained Staff

## Industry

Nonprofit

## Country or Region

Across Canada

## Partner

**Endeavour Solutions Inc.**

[www.endeavoursolutions.com](http://www.endeavoursolutions.com)

[www.purelycrm.com](http://www.purelycrm.com)

## Executive Summary

Coast Mental Health is a non-profit organization dedicated to expanding supportive housing, programs, employment, education services, and fundraising initiatives. As the organization grew, it became evident that existing software systems could not support real-time, strategic, data-driven decision-making. To address these challenges, they sought a unified platform to eliminate cross-departmental data silos and enable integration across business applications, including installations, data migration, customization, and integration.

## Business Challenge

Before the upgrade, Coast Mental Health relied on an older version of Microsoft Dynamics CRM On-Premise, which presented numerous obstacles. Persistent technical issues, system instability, and limited accessibility hindered daily operations. The legacy CRM lacked scalability to support growing demands and future program expansion.

Reporting was inefficient and required extensive manual effort, making it difficult to generate meaningful insights or evaluate program effectiveness. Many staff still maintained client information and reports on paper, a practice that compromised security, degraded efficiency, and threatened data accuracy and legibility. Additional issues included security vulnerabilities, compatibility challenges, lack of vendor support, reduced productivity, regulatory compliance risks, and frequent data loss.

## Solution

Coast Mental Health partnered with **Endeavour Solutions** to implement the "Microsoft Cloud CRM 2.0," a custom-configured Microsoft Dynamics 365 CRM integrated with the Power Platform. The new architecture included Power BI for executive-level reporting, Acori for supportive housing management, and integrated finance and HR systems.

Together, the teams facilitated business and IT stakeholder workshops to ensure the solution met Coast Mental Health's specific operational and strategic objectives. The collaboration yielded a revised approach for configuring, setting up, and training users on the new platform. Endeavour Solutions supported data migration, designed a complex custom security framework, and provided detailed training for all users.

## Customer Story: Coast Mental Health

*“Our previous system lacked scalability and efficiency, but with Endeavour’s expertise, we now have a powerful tool that will dramatically improve the flow of information and accessibility.”*

Coast Metal Health

### Transform with Training

Endeavour Solutions delivered a comprehensive, structured training plan aligned with Coast Mental Health’s internal change management processes—a novel approach compared to previous system rollouts. This structured training, totaling 232 hours, helped facilitate higher user adoption and proficiency by integrating with the organization's culture and workflows rather than imposing disconnected lessons.

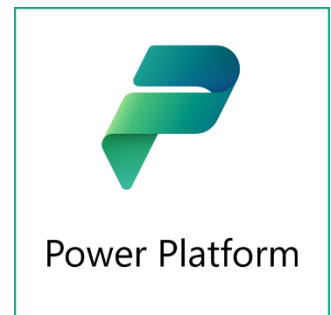
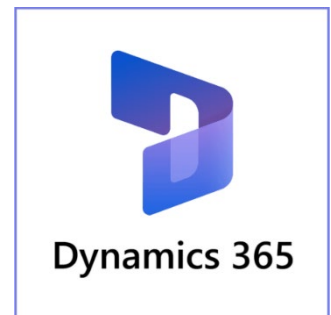
### Turning Vision into Value

Coast Mental Health's collaboration with Endeavour Solutions and the Purely CRM team has been transformative, leading to the creation of a beautifully designed Microsoft-based Case Management application pivotal in enhancing service quality and patient care. The well-defined training plan ensured a smooth transition, allowing over 700 staff members to quickly adapt to the new system.

Since going live, the new Microsoft CRM system has provided enhanced system stability and accessibility, allowing all departments to rely on consistent, up-to-date information for decision-making. Robust security features, including granular access controls and real-time system monitoring, ensure data protection and regulatory compliance.

Improved integration fosters better communication and collaboration across teams, while automation and consolidated workflows reduce administrative burden. Reporting and analytics capabilities now provide deep insights into client outcomes and program performance, empowering strategic adjustments.

Training investments have achieved strong user adoption, increasing data quality and organizational consistency. The flexible design of the CRM platform also supports future growth, scalable expansion, and ongoing innovation to meet evolving community needs.



### About Endeavour Solutions

Endeavour Solutions is a Microsoft AI Cloud Partner and leading CRM consultancy specializing in Microsoft Dynamics 365 across North America. With offices in both Canada and the United States, Endeavour offers a full suite of services—including consulting, implementation, upgrades, custom development, data analytics, training, and ongoing support for Dynamics 365 CRM and related Microsoft platforms.

Our firm is recognized for its award-winning expertise and commitment to helping mid-sized organizations improve their sales, customer service, and marketing performance. Endeavour’s proven track record, industry recognition, and deep Microsoft knowledge make it a trusted partner for driving CRM success.

