



Smart Funding: managing funded projects efficiently and transparently

WHITE PAPER



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Introduction

There are many possibilities for companies to receive funds. In Germany alone, there are over 2 500 funding programs for companies according to the German funding consultancy (Deutsche Fördermittelberatung). Digitalization, renewable energy, or helping companies get back on their feet after losses due to the pandemic – these are just a few cases when local, federal, and state governments as well as the EU provide funding to support the economy, especially small and medium-sized companies.

The chances to receive funds are quite high in many industries, like construction, agriculture, forestry, retail, and hospitality. But also registered clubs, associations, foundations, and public institutions often benefit. Especially when it comes to the topics of digitalization and sustainability, the funded budgets will likely rise even further in the future.



Although the German government offers plenty of opportunities to receive financial support and funds for innovations, many budgets remain untouched. The bureaucracy and the risk of back payments scare off companies. Funded projects must often comply with numerous requirements, and efficiency is imperative when realizing them.



Whenever a high level of organization as well as an exact overview over progress and costs are needed – in short: in complex situations –, digital tools are particularly valuable. In this white paper we'll therefore introduce you to a solution that makes the management and controlling of funded projects much easier: proMX 365 Smart Funding.

Challenges with funded projects

There are two big hurdles to take that discourage organizations to apply for funds and to realize the respective projects.



High administrative effort: added value vs. added effort

Federal or state governments, or the European Union provide companies and other organizations with money for their projects because they see how society benefits from them in the long run: a healthier environment, more jobs, higher tax revenues.

Of course, authorities need to be careful with giving out money. Citizens don't like to see their taxes wasted.

That is why funding programs are tied to certain conditions. Also, the requirements and the obligation to provide evidence are rather strict for those making use of funding. The effort for administration and documentation can be particularly challenging for small and medium-sized companies where employees often fill more than one role.



Risk of back payments: easy come, easy go?

In contrast to credits from financial institutions, companies usually don't have to repay governmental funds. Ergo, they always benefit from the funding financially. Unless they do have to pay back the funded money.

Funding authorities reserve the right to ask for back payments if agreed-upon terms are not met. That means, under certain circumstances, a company is obliged to reimburse part of the funded sum. For example, in case the financial means have not been used as intended, the funding budgets have been exceeded or the company does not or no longer meet the conditions to get funded.

The recipients of funding also risk back payments if they cannot, on time, provide full proof of correct spending of the provided money and of complying with the conditions of the project.

If the funded organization does not follow an order to pay back, consequently, it might not be allowed future funding.



proMX 365 Smart Funding for project management and funds controlling

proMX 365 Smart Funding was developed to support organizations with the management of funded projects and controlling financial aids. It functions as a tool that enables them to control funded projects efficiently and that makes cost and project planning more transparent.

Smart Funding allows documenting project processes without gaps regarding work effort and costs. At any given time, it offers you an overview of costs already spent and those that are planned, measured against the funding sums that are available for the respective project. This function to control costs guarantees clean final reporting and minimizes the risk of back payments.



Technical background

proMX 365 Smart Funding is based on the Microsoft project management solution Dynamics 365 Project Operations, an extensive all-in-one solution for professional service companies. It covers all project-related tasks, starting from sales and project management to billing.

proMX reduced the manifold functionalities of the application and kept only those useful for managing and controlling projects financed through funds. Project handling has been facilitated and processes for reporting and financial controlling added.

Benefits

Like any Microsoft solution, proMX 365 Smart Funding can be integrated with other Microsoft services and applications smoothly. The seamless connection to Outlook, Teams, and SharePoint is particularly practical in project business.

For users that are already familiar with Microsoft applications, access to proMX 365 Smart Funding will be easy. Furthermore, non-programmers with some basic IT skills will quickly learn how to build own dashboards or adapt existing ones.

The solution is suited for all users involved in project work:

Project managers, team members, and the company's management. proMX 365 Smart Funding supports each user type with the features they need for their work.

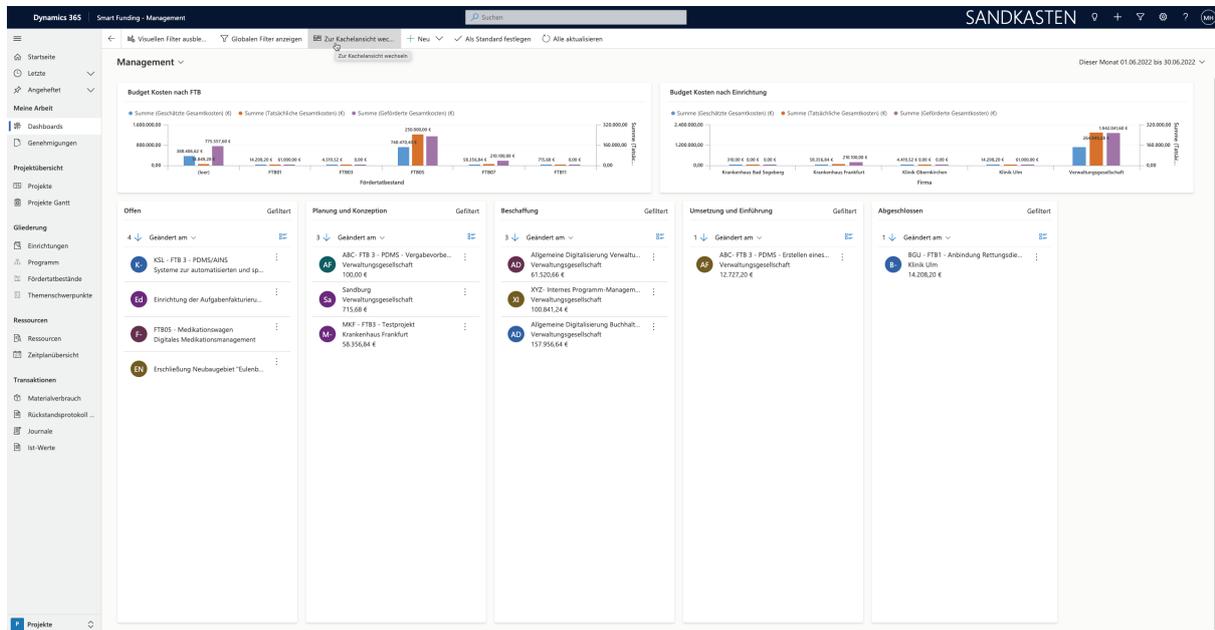
| User type | Management (CFO/chief of project controlling) | Project manager | Team member |
|--------------------------------------|---|--|--|
| Needs | Overview of status quo of projects and their costs | Project management functionalities; current overview to recognize problems early on and to be able to intervene flexibly | Overview of own tasks, time and expense tracking |
| Advantages with Smart Funding | <ul style="list-style-type: none"> ✓ Current budget overview ✓ Visualization of project progress ✓ Minimized risk of back payments ✓ Usage of multiple funds at the same time ✓ Fast creation of final reports without gaps ✓ Business analysis capabilities ✓ Overview of scheduled resources | <ul style="list-style-type: none"> ✓ Reduced risk of errors ✓ Better overview of all projects ✓ Central document storage ✓ Time savings ✓ Flexible customization to organization structure ✓ Precise task planning ✓ Visualization of project progress ✓ Risk management | <ul style="list-style-type: none"> ✓ Simple usage ✓ Clear team and project assignment ✓ Well-defined to-dos incl. deadlines ✓ Fast time tracking ✓ Central document storage ✓ Introductory learning path |

Features preview

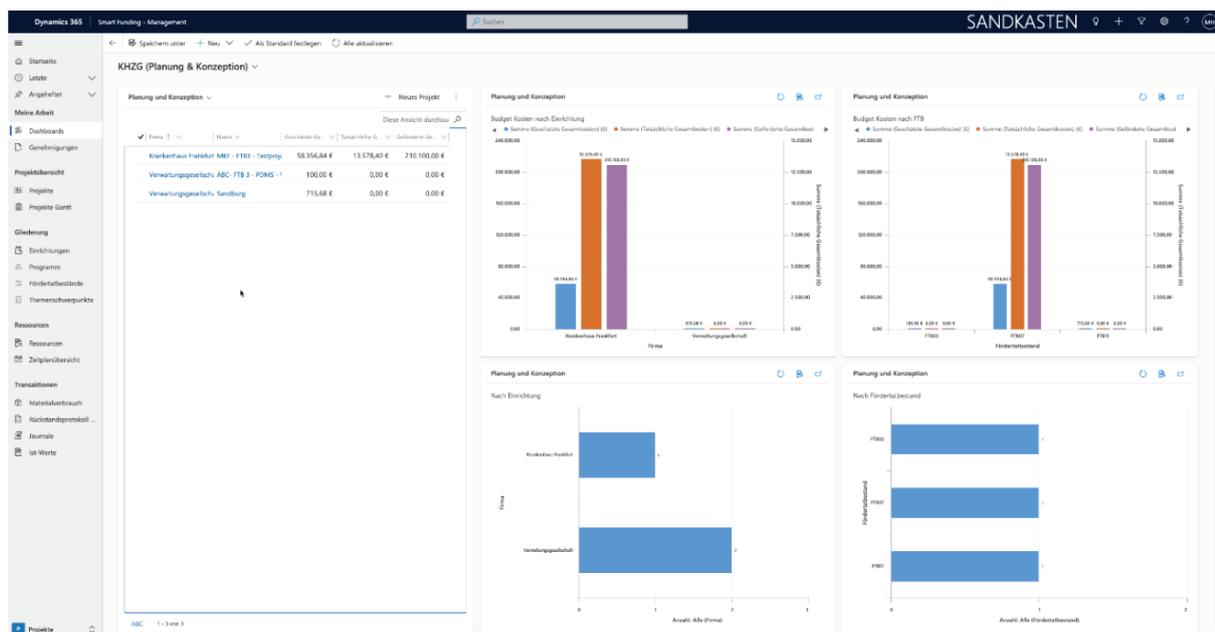
The right professionals will help you install proMX 365 Smart Funding in almost no time.

Administrators can assign user roles in the security and permissions panel. That way each user only sees what they are meant to see and can only make changes where they are meant to make them. The menu adapts to the individual user. Typical user groups are management, project managers, and project members.

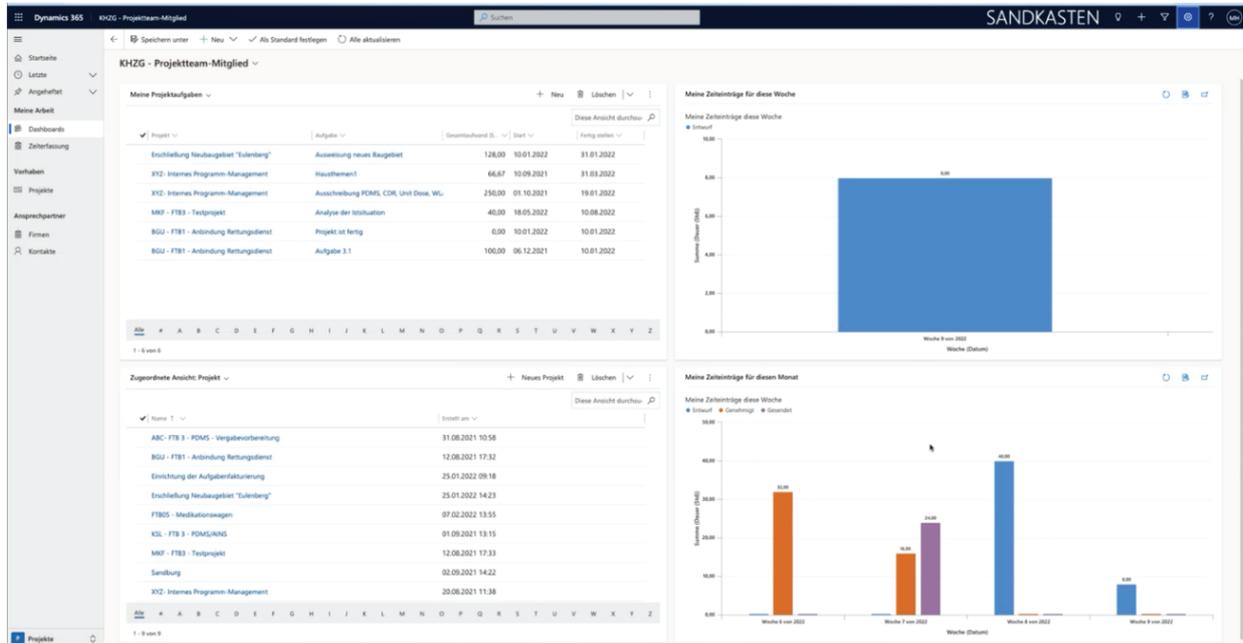
Users are usually greeted by a dashboard with displays of diagrams of figures and facts that are most important to them.



The management dashboard displays an overview of the status quo of all ongoing projects, especially regarding costs.



Project managers can keep an overview of their projects on their dashboard.



Upon logging in, the people involved in projects can view all their assigned tasks as well as their time entries.

These dashboards don't require any coding knowledge to be individualized and extended by custom data, for example from Microsoft Power BI.

The "My work" area in the left menu of the app also adapts to the user group. There, team members can access time tracking; project managers can access submitted and approved time entries, and management can access approvals.

Project management

proMX 365 Smart Funding can be used as soon as your funds get approved. A project in Smart Funding is covered during the start, implementation, and the final documentation.

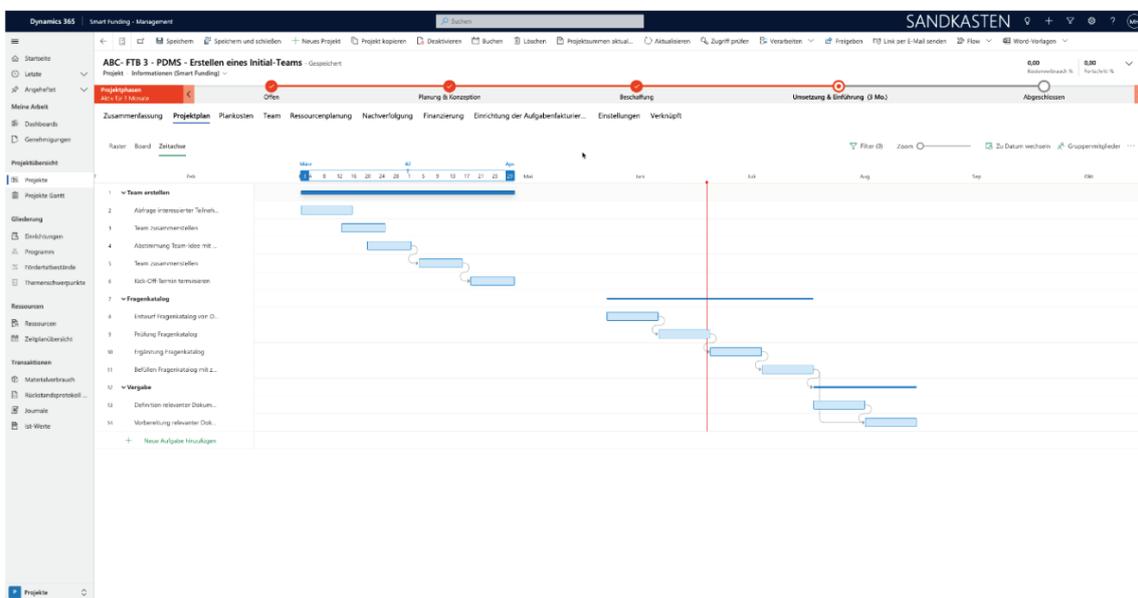
In the project view, all important data can be stored, for example the type of funding program, a description of the initiative, and the assigned project manager. Data regarding time and costs can be viewed, too: start and end date of the project, project progress, current personnel and material costs, the next planned steps or whether the project is still within or exceeding the funding budget.

The screenshot displays the Dynamics 365 project management interface. At the top, the title bar shows 'Dynamics 365 | Smart Funding | Management' and 'SANDKASTEN'. The main header area includes navigation icons, a search bar, and a 'Projekt' dropdown menu. Below this, a progress bar indicates the project's status: 'Offen', 'Planung & Konzeption', 'Beschaffung', 'Umsetzung & Einführung (3 Mo.)', and 'Abgeschlossen'. The current phase is 'Planung & Konzeption'. The main content area is divided into four columns representing different project stages: 'Team erstellen', 'Konzeption Anforderungskatalog', 'Vorbereitung Vergabe', and 'Vergabesteuerung'. Each column contains a list of tasks with their respective durations and status indicators. For example, under 'Team erstellen', tasks include 'Team zusammenstellen' (10 Tage) and 'Abstimmung Team-Idee mit DiKu' (10 Tage). The interface also features a left-hand navigation pane with options like 'Startseite', 'Letzte', 'Angabe/Zeit', 'Meine Arbeit', 'Dashboards', 'Genehmigungen', 'Projektübersicht', 'Projekt Gantt', 'Gliederung', 'Erstellungen', 'Programme', 'Händlerbestände', 'Themenschwerpunkte', 'Ressourcen', 'Zahlpläne', 'Transaktionen', 'Materialverbrauch', 'Rückstandsprognose', 'Journal', and 'Ist-Werte'. A right-hand sidebar contains a 'Filter' section and a 'Gruppieren nach Bucket' dropdown.

The heart of the project is the project plan. It displays basic project management tasks easily and visually appealing.

There, projects managers can plan and structure their projects by creating and sorting project tasks, connecting dependencies between tasks, assigning resources to them, and determining or adjusting their duration.

The project plan can be displayed and edited in three different views: as a list, as a Kanban board (see screenshot above), or as a Gantt diagram.



Project plan as Gantt diagram

In the planning view, information all the way to the project task level can be accessed. That includes project assignments, dependencies between simpler tasks, and project progression. Permitted users have the opportunity to make changes to the plan directly.

Resource management

If it's not clear yet whom to assign a task, project managers can plan with generic resources. That means that a group of people – for example a developer, consultant or project leader – can be assigned as a placeholder. The system then calculates the respective rate automatically. Later a generic resource can be replaced by a real person with the respective qualifications.

As soon as tasks are assigned to resources, expenses will be calculated automatically depending on the duration of the task and the working time model of the resource. An example: a task has a duration of 10 days, the assigned resource works eight hours per day. Smart Funding calculates labor costs for 80 hours.

The “team” tab shows you which task has been assigned to which resource as well as the total labor effort (in hours) and the mandatory hours of the person in the project.

Project controlling

The calculated result of the project planning can be viewed in the tab “planning costs.” There, the system is constantly calculating all current project costs. Figures don't have to be added or updated manually. Instead the system resorts to existing information, for example the hourly rates assigned to resources. Material costs or calculated material costs can be added, too.

In addition to the expected total costs of a project, you can also view the cost distribution among days, weeks, months or years.

Time tracking

Project team members can document their project working times easily and without complications via time tracking. The form only provides them with the project tasks that were assigned to them by the project managers.

They track the start and end times of their work, a task description and the type of time entry (work, holiday, absence). Adding a comment is possible, too.

The project team member can view their time entries in a calendar or list view. As soon as a time entry has been submitted, status and color of the booking change and it can no longer be edited. Approving the time entry is job of the project manager.

Integration with Outlook and Teams

As part of every project, a lot of e-mails are written that often sit in your inbox unsorted. By integrating Dynamics 365 with Outlook both incoming and outgoing e-mails can be assigned to the right project in proMX 365 Smart Funding. That way all written (electronic) correspondence can be documented and accessed by everyone involved from one location. Assignment is possible with just a few clicks directly in Outlook.

You can also create a team for every project in Microsoft Teams and embed the project overview from Smart Funding as a tab. Tasks can be synchronized between the system and Teams, too.



Customer reference: Agaplesion gAG

As a clinic network with various hospitals all over Germany, we make selective use of funds. proMX customized the solution perfectly to fit our organization structure. It supports us greatly with always applying all funds at the right location to the right initiative.

Sebastian Kühn (M. A.)

Process Manager at Agaplesion gAG

About the company:

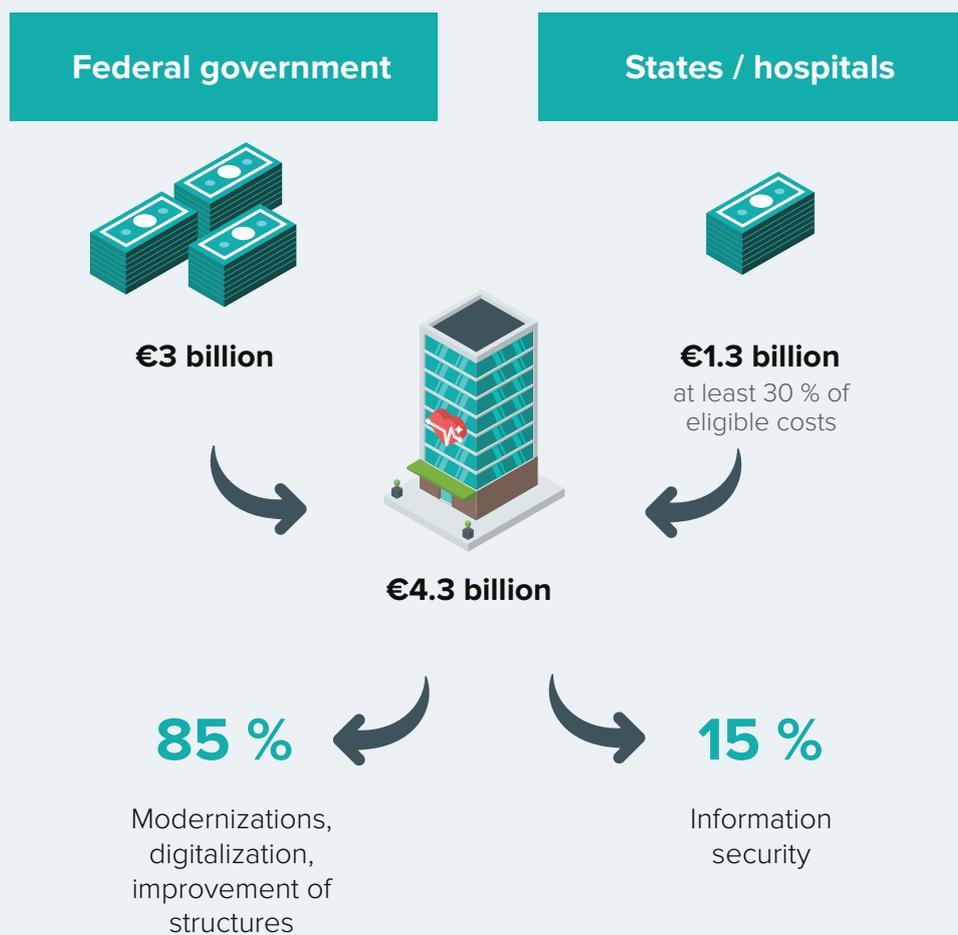
Agaplesion gAG is a Christian health group from Germany. Founded in 2002, today it maintains 20 hospitals in ten German states. Additionally, around 80 other facilities belong to Agaplesion, among them mobile nursing services, retirement homes, hospices and community health centers. The group employs around 20 000 people.

Initial situation:

In October 2020, the German Krankenhauszukunftsgesetz (KHZG, Hospital Future Act) came into force. The German government aims to speed up the slow digitalization of the care sector. As part of the KHZG, Germany and its states provide funds to facilities to improve their digital infrastructure till the end of 2024.



Facilities that received such funds, but do not offer certain digital services from 2025 (e.g. patient portals and digital medication management) will have to pay up to 2 percent of their bills by themselves.



Agaplesion too requested funds from different German states and is now required to take some big steps towards becoming more digital. Across all facilities, there'll be 600 different projects until the end of 2024.

Challenge:

Agaplesion needs to keep an overview over a large number of projects. The health group makes losses by paying installments, which is why it wants to avoid back payments at all costs.

Due to the many projects that have to be implemented and their respective significant budgets, the only solution that Agaplesion considered was a comprehensive project management solution. An overview of all projects and solid controlling capabilities were imperative.

Solution:

Agaplesion and proMX were introduced by Microsoft. The Microsoft partner implemented proMX 365 Smart Funding and adapted the solution to the requirements of the health group.

During the Corona pandemic, the company either introduced Microsoft Teams or increased its usage; therefore a Teams integration with Smart Funding was particularly important. Microsoft Outlook and other Microsoft 365 solutions are used in most facilities, which is why their integration was a priority, too.

For its documentation, Agaplesion values solid time tracking functionalities and an overview over costs based on bills, because many materials needed to be purchased for implementing the projects, e.g. hardware and software licenses. In Smart Funding related invoices can be tied to the projects. To achieve that, the app was connected to Microsoft SharePoint. That way for each project a folder was created that contains documents such as supplier contracts or bills.

The storage for documentation and communication via SharePoint were major benefits of proMX 365 Smart Funding.

Results:

proMX 365 Smart Funding offers Agaplesion gAG a technical framework for implementing its many internal digitalization projects as part of the funding program of the German Hospital Future Act (KHZG).

They were clustered based on the subjects and fundable initiatives of the KHZG. Agaplesion currently has more than 600 projects displayed in proMX 365 Smart Funding, starting directly from when the funds were requested.

Every project has a budget assigned to it that the respective project management works with. Over the next few years the group will be working on these projects. By connecting Smart Funding and SharePoint, proper documentation is guaranteed.

Agaplesion has already documented and finished some of its first projects funded by the KHZG.



We offer a helping hand in your digital transformation

The ideal digital transformation partner is not only an expert in theory and technology but also in its customer's industry. Our consultants are familiar with the processes, priorities and challenges of digital projects in the health care sector.

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