



Crow Wing County

Agile Technology Solutions

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Case Study Snapshot



Crow Wing County revamped its internal technology processes and created a centralized, secure portal for residents and contractors to obtain county land and highway permits.

The Situation

The first situation focused on the IT department of Crow Wing County, which used various legacy systems to receive and act on IT work order requests and assignments.

The second situation had considerably more complexity. Crow Wing County used multiple systems for permit applications and inspections, leading to inefficiencies and difficulties in managing data. What Crow Wing County employees needed was a more efficient way of serving each other and those living in the county. This included automations for each permit type to anticipate county regulations, fees, and on-site inspections.

The Solution

A two-pronged approach was taken to address the unique needs of the complex systems used by Crow Wing County. First, Forvis Mazars helped build a new IT help desk system using Microsoft Dynamics 365 Customer Service.

Second, a two-phased resident and contractor-focused project was completed to retool select county permitting processes using the self-service portal capabilities in Dynamics 365 Customer Service. This included an integration to collect permit payments within the portal experience. The new system transitioned the county from multiple, disconnected platforms to a streamlined, centralized system. It offered contractors and residents a timesaving

solution with step-by-step guidance to confirm all aspects of permit regulations were communicated.

The Benefits

Since implementing Dynamics 365 Customer Service for self-service portal functionality for permits and help desk ticket management, Crow Wing County has greatly improved efficiency. Onboarding new employees has been simplified, with many functions now available in the centralized system. The IT team gained actionable insights through advanced reporting and dashboards. County permitting efficiencies included improved customer experience, alignment within land services permit assessment processes, and visibility for the highway department to engage quickly and route requests to appropriate resources.

“The professionals at Forvis Mazars have been instrumental in updating our systems and helping us improve workflows.”

– Jason Walkowiak, IT Director, Crow Wing County



The Full Story

Crow Wing County is a county in the East Central part of the U.S. state of Minnesota with a population of over 62,000 residents. The customer relationship management (CRM) team at Forvis Mazars first started working with the Land Services department in the summer of 2020, focusing on the implementation of Microsoft Dynamics 365 and a custom portal.

IT Help Desk Solution

The IT department of Crow Wing County had issues with disjointed and outdated systems for processing help desk tickets to serve the IT needs of over 600 county employees and associated agency and department professionals.

It should be noted that change is challenging even when legacy platforms no longer seem useful. Through the change, the team at Forvis Mazars collaborated with Crow Wing County staff to understand their needs and then align the new CRM application to meet their needs and drive efficiency. Jason Walkowiak noted that the team went beyond looking for solutions that fit. “The technology consultants at Forvis Mazars were great at thinking outside the box. They listened to understand and consulted with purpose.”

The new IT help desk powered by Dynamics 365 Customer Service provides ticket management capabilities like support for complex branching processes, configurable queues, email automation, rule-based ticket routing, ticket reassigning, and escalation. The system also provides customizable dashboards and reporting.

For example, the IT team can easily find the “top 10 ticket types” for IT-related cases so the team can proactively address common issues. The IT department also has access to a trove of knowledge articles stored in the system, allowing easy access to help the team implement solutions to reduce ticket volume and improve efficiency.

The Forvis Mazars team knew that the county needed their setup of Dynamics 365 to have purposefully designed, streamlined workflows to make key information easier to access and manage for both internal and external users. The multifunctionality of Dynamics 365 provides:

- Automated pre-defined system alerts to help troubleshoot and resolve common issues faster
- Custom reports to help the IT department track key metrics
- AI-driven analysis of the help desk team’s performance
- Automated triggers for request approvals and ticket routing
- Custom self-service portal functionality to assist with smoother, faster permit application processes

Permitting Solution

Another major CRM project was the implementation of Dynamics 365 to help modernize and streamline Crow Wing County permitting processes. This project retooled select county permitting processes to help residents and contractors



The Full Story

move faster through the process. The solution addressed several challenges, including:

- **Fragmented Systems:** Previously, Crow Wing County used multiple systems for permit applications and inspections, leading to inefficiencies and difficulties in managing data. The CRM system helped streamline workflows and reduce redundant steps.
- **Complex Application Processes:** The detailed and varied application processes for different types of permits, e.g., residential versus commercial building development, landscaping rules near waterways or septic planning, etc., were cumbersome for applicants and county staff. The custom portal guides users through the application steps, helping to simplify the process.
- **User Experience:** Applicants faced difficulties navigating the application process and understanding local regulations. The portal's user-friendly interface, progress bar, sample diagrams/files, and prompts for regulations help improve the user experience, making it easier for applicants to complete their applications.
- **Payment & Application Tracking:** The previous system lacked a streamlined payment process and tracking capabilities. The invoice generation process factors the unique permit fee structure and identifies when a property may be missing additional permits to complete its application. The new portal allows applicants to receive invoices and choose different payment options. In addition, applicants can save and return to incomplete applications, and county staff can track the approval process within Dynamics 365.
- **Interdepartmental Coordination:** Different departments, e.g., Land Services, Highway Department, had their own systems and processes, leading to siloed operations. The CRM system facilitates better coordination and communication between departments as new property development often requires permits from both land and highway. The technology solution provides a more cohesive approach to managing applications and services.

The Results

With help and support from Forvis Mazars, Crow Wing County experienced internal and external wins with Dynamics 365. The IT department noted that having a centralized hub for data management has been a significant advantage, streamlining processes, reducing redundancy, and providing a single system for employees to train on and use. For IT support, staff can easily submit a ticket via email, SharePoint, or voicemail, and the system helps track ticket history and generate reports for better decision making. For external users, the self-service portal provided a one-stop solution for permits and applications, elevating efficiency and community satisfaction.

The permitting solution identified many complexities within the regulations that were often local knowledge to the planning department or environmental services inspectors. The portal effort exposed these details and included strategic engagements within the process as each individual permit was selected. It provided a unique step-by-step guide to residents and contractors to collect the correct data throughout the application, expediting the permit approval process.



Business Technology Services at Forvis Mazars can help support your organization with enterprise resource planning (ERP), customer relationship management (CRM), advanced technology, and managed service solutions. Our end-to-end services include technology assessments, design, implementation, upgrades, training, monitoring, and support to help clients achieve their digital transformation goals.

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