

## Centra Pulse improves Management Information and Productivity through its use of Microsoft Dynamics CRM



Enhancing Life Chances

### Background

Centra Pulse (formally Invicta Telecare) is a not for profit organisation which is part of The Circle Group, one of the UK's leading providers of affordable housing, established in 1986.

Centra Pulse provides telecare support that enables over 125,000 vulnerable people both young and old, to live safely, happily and importantly, independently in their home.

### The Solution

Over the years Centra Pulse has invested heavily in advanced technology and communications equipment, to ensure a reliable and cost effective service is provided to its customers.

Centra Pulse's sales and marketing team looked to Microsoft Dynamics CRM in order to have a system to monitor and record enquiries and manage sales made for the company, as well as to ascertain where the most effective marketing was being done.

The CRM system was replacing complex spreadsheets used across the team.

### Using Microsoft Dynamics CRM

Centra Pulse took out a trial of Microsoft Dynamics CRM Online and turned to CRM consultants Caltech IT Limited, Silver Microsoft Dynamics CRM experts, to help to implement the solution.

Caltech IT Limited took a structured approach to the implementation using Microsoft SureStep. Centra Pulse provided detailed processes with key functions that CRM would need to manage.

Sturgess confirmed, “Caltech IT Limited was dedicated to making sure the CRM solution was right.”

### Significant Benefits

“Centra Pulse uses Microsoft Dynamics CRM to record enquiries and sales which helps to look at sales team goals and conversion rates, as well as providing an employee development tool. Centra Pulse also uses Microsoft Dynamics CRM to manage marketing campaigns which provides the ability to report on the effectiveness of marketing activities. Customer details are maintained so that Centra Pulse is able to supply excellent customer service,” explains Amy Sturgess, Telecare Sales Manager.

Microsoft Dynamics CRM has delivered significant benefits.

Microsoft Dynamics CRM has removed the need for double-keying and improved the information captured and tracked during the sales enquiry process. It has helped to decrease time spent producing Management Information and it has enhanced reporting capability to allow detailed Sales & Marketing analysis and strategic planning.

Amy Sturgess further explained, “Centra Pulse is able to provide reports via Microsoft Dynamics CRM and therefore is able to provide more accurate projections for budgeting. Productivity has also improved as the process within Microsoft Dynamics CRM is more efficient and reliable than previous methodology.”

Sturgess confirmed that the best advantage Microsoft Dynamics CRM has provided is a more intelligent knowledge of the statistics.

Sturgess concluded, “CRM has enhanced the intelligent data that Centra Pulse can now analyse and really focus on delivering great customer service at ease, rather than getting tied up in inefficient data logging methods.”