

## North of England Procurement Collaborative upgrades Microsoft Dynamics CRM with Caltech



North of England  
Commercial Procurement Collaborative

### Background

North of England Commercial Procurement Collaborative (NOE CPC) is a collaborative procurement organisation which provides the delivery of quality health products and services at the lowest available prices for its member organisations, based on framework agreements which its members can buy into. It is able to provide its members with significant cost savings.

NOE CPC was established in 2007 and is wholly owned by the NHS. It comprises of a team of expert procurement and commercial professionals from the private and public sectors, as well as a team of supporting data analysts. It is based in Sheffield, and has a membership approaching 80 NHS organisations, spread across England from Salisbury to North Cumbria.

### The Solution

#### Microsoft Dynamics CRM

NOE CPC has been using Microsoft Dynamics CRM since 2008, and was using version 4. Over the years Microsoft Dynamics CRM has progressed over several versions, and it has been enhanced with many new features and it is now unrecognisable from the version 4 instance.

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The system has worked well for NOE CPC over the years, however the users started to feel that the look and feel was outdated and that it was difficult to use. They felt that version 4 offered little advantage for them and mobile capability was unavailable. Ian Andrews, Interim Head of e-Commerce & Information at NOE CPC confirmed, *"The upgrade of Microsoft Dynamics CRM was part of a broader infrastructure upgrade programme. The version 4 solution was old and was moving out of support."*

Despite the version 4 perspective, NOE CPC wanted to enhance the software as they could see clear benefits for being on a later version, which would help the users in their everyday working lives.

The decision was to upgrade Microsoft Dynamics CRM to make it a more appropriate fit, and enable the users to get used to the new interface.

NOE CPC turned to Microsoft Dynamics CRM Silver Partners, Caltech IT Limited.

### Using CRM

Microsoft Dynamics CRM manages all communication and is the backbone business solution at NOE CPC. Dynamics CRM is used to track each contract, the savings per customer and all account management functions. It also ensures that the deliverables are managed accordingly, taking into account NOE CPC employee numbers, the number of projects and

timescales. This helps NOE CPC ensure that it can deliver each project on time by spreading the workload accordingly, and Microsoft Dynamics CRM facilitates this time management.

Ian **Andrews confirmed**, *“The initial implementation of Dynamics CRM was fine, but over the years lots of bugs started to show and some custom scripts were outdated.”*

## The Solution

Ian **Andrews states**, *“The clearest advantage of the upgrade is that Dynamics CRM integrates with the 2013 Microsoft Productivity Suite. Now, we can redefine processes. The users realised that we had taken Dynamics CRM and made it better for them with the new interface and resolution of bugs during the upgrade.”*

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Ian **continued**, *“There was a great interface between Caltech and NOE CPC, which means that as users raised queries, they were dealt with swiftly and effectively. This value that Caltech provided cannot be understated, as users felt that the new system was seamless, and they could get on with their roles. Furthermore, people wanted to experiment and everyone has found the upgraded CRM more intuitive and clearer.*

*This gave us confidence in Caltech, as the team demonstrated competence and skill with our complex project needs, and the upgraded solution we now have, resembles what we wanted.”*

*Caltech worked hard to upgrade the Dynamics CRM solution and Andrews agreed, “Caltech say what they are going to do and then do it. There is no fuss, no stress, no drama, and I would cheerfully work with them again.”*

**The upgraded solution has improved NOE CPC’s business practises and Ian says**, *“We are in the 2<sup>nd</sup> decade of the 21<sup>st</sup> century. If you can’t turn data into intelligence you will be left behind. CRM is an excellent tool for achieving that.”*

## Next Steps

There is a lively debate about moving forwards at NOE CPC. The engagement with users is considerable and there is lots of enthusiasm. People feel happy with the upgrade and can see how Dynamics CRM can start to help their working lives. A second project has commenced to now start to enhance the system **and redefine processes which couldn’t have worked in the old version.**

**Phil Callaghan, managing director at Caltech CRM confirmed**, *“It has been a pleasure to work with NOE CPC and we are pleased we were able to provide a successful upgrade.”*