How We Installed, Use and Have Gained Efficiencies With Microsoft Dynamics CRM

Transcript taken from Caltech Forum 2010, March 2010

Client :   Affinity Healthcare
Vertical Market :   Health
Requirement :   Focused marketing efforts
                         Money saving on marketing campaigns
                         Focused sales drive
                         Integration with legacy systems to ensure data is up to date
Solution: Microsoft Dynamics CRM Hosted

Benefits to Affinity Healthcare of Microsoft Dynamics CRM delivered by Caltech CRM :

- A system that does everything they required without onerous change management procedures
- Effective marketing and sales management, with a shorter sales cycle
- Transparency of employee effectiveness

"If you asked us to say what it was like before we used CRM we couldn't answer – we couldn't do our jobs as effectively if you took it away."
Michelle Winn

Background

Affinity Healthcare is a leading provider of mental health services for the NHS in North West and East, also developing into Midlands and Yorkshire. Affinity Healthcare sells mental health services to the NHS. Cheadle Royal was the first hospital that Affinity Healthcare operated from, then Darlington and now another hospital in Preston. Affinity Healthcare employs 1000 people, with only 7 employees in sales and marketing.

Affinity started to use Microsoft Dynamics CRM in October 2007. Michelle Winn of Affinity Healthcare states, "If you asked us to say what it was like before we used CRM we couldn't answer – we couldn't do our jobs as effectively if you took it away."

The services that Affinity Healthcare offers include but not limited to, psychiatric care, forensic services, eating disorder care. Within the NHS there are different people holding the purse strings, different people referring, and different people heading up these services in the NHS.

Michelle Winn continues, "Data specification in our system is efficient. We have high quality data and high level data that is very specific. We use this data to record sales and market the business, as well as helping to run conferences, and sending out invites. We want people to be engaged with our emails and thus have set our data so that it ensures specific information for various services. We have all our NHS organisations split out by region as that's how we work at Affinity."

Michelle Winn continues, "When I access my database it brings up all my data, all my regions. Affinity Healthcare also wanted to be able to target 'types' as we have lots of different services. There are currently 53 different types of organisation in our CRM system and it is separated focusing down on what matters to that contact."

Affinity Healthcare also has other systems that run the hospital such as billing and hospital record systems. CRM is tied to the hospital management system to keep the data fresh and updated and ensure that Affinity can collate the information they need to gather more contacts.

Michelle Winn explains, "It's about getting those on ground level to forward or refer clients to us. Caltech totally understood what we wanted to do with the system and managed that thoroughly for us. Rob Walwyn project managed the implementation flawlessly."

The accounts system is also linked to Microsoft Dynamics CRM tracking the account code so that the account managers can ensure that they are aware if the client has paid and keep track.

Affinity Healthcare's data is detailed and was put into the system in a clear manner. It has sub accounts – hospitals, sub accounts, and then contacts who are of the highest importance to Affinity Healthcare. Michelle Winn explains, "The NHS organisational structure is complex so we designed Microsoft Dynamics CRM to work with that structure. We also have split out referrers and purchasers – people who bring us the business and make referrals and the purchaser the person who holds the budget. We need to interact with both of them."

Affinity Healthcare also provides services to prisons and courts as well; a newer business focus. This information is also stored in CRM and Affinity can target the right people with the right message.

"I've always been a big champion of CRM. It's made us more organised and able to track activities effectively."

Michelle Winn confirms, "When my Commercial Director wants me to target specific services and drive up business, I can send mini campaigns to my target contacts to get interest higher in that specific area."

"Caltech CRM has also saved us a lot of wasted time and money. As a business we had been running 10 to 12 marketing campaigns every month which would be sent via surface mail. Using CRM has saved Affinity Healthcare thousands of pounds. Microsoft Dynamics CRM has given us greater confidence for marketing, more focus and reporting and a paper free office – one system, one truth." Michelle Winn.

Next Steps

Priory Group agreed to the purchase of Affinity Healthcare in January 2010, subject only to clearance from the Office of Fair Trading. This clearance has now come through and on 19th March 2010 Priory completed the purchase of the company. From this date, Affinity's three hospitals Cheadle Royal Hospital, Manchester, Middleton St George Hospital, Darlington, and Sion House, Preston, transferred to the Priory.

Caltech CRM are now working with Priory Group, rolling out CRM for its staff. John Hesman CRM developer and Rob Walwyn project manager are working to Priory Group requirements and are involved in implementing its system and data. December 2010.

About Caltech

Established in 1999, Caltech has become one of the UK's leading suppliers and implementers of Customer Relationship Management software (CRM). Based near Leeds, it works with clients to manage their customer contact strategies, operational processes and daily business functions in order to maintain audience loyalty, increase awareness and ultimately drive sales. This is achieved by recommending, implementing, developing and integrating a variety of cutting edge database technologies that are most suited to the brief in hand, including; Microsoft Dynamics CRM, GoldMine, HEAT and ACT! By Sage.

Caltech is able to tailor every system to the specific needs of its clients whether it is an SME or large blue chip organisation and regardless of their IT capability. Long term and successful integration is when CRM works best so Caltech, unlike many of its competitors, is not just a supplier – the team works on an ongoing basis with every client to develop specific systems so they work hand in hand with existing software, from accountants systems to telephony packages, which can be adapted to meet ever changing needs.

Current Caltech clients include; Simply Biz, TNT, the NHS Information Centre and Hays Travel. Customer service is at the very heart of everything Caltech does – it sees clients as partners and is committed to meeting and exceeding expectations in the most effective way possible, leaving a real sense of confidence.

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