



Caltech CRM Delivers Expert Excellence through Microsoft Dynamics CRM



Background

The Information Centre is England's central, authoritative source of health and social care information. Acting as a hub for high quality, national, comparative data for secondary uses, they deliver information for local decision makers to improve the quality and efficiency of frontline care.

Their mission is to be the recognised source of relevant information to improve decision making in health and social care. The services they offer improve the use of data in health and social care. They define what is needed, allow it to be collected and ensure that it will lead to useful information. Information Centre support existing national policies and look at future information needs.

The issue

Information Centre had inherited a service desk system that really wasn't working for them. It had been used previously by other teams and had their information populated in it, and reports were difficult to generate. They sourced a supplier of CRM and had Microsoft Dynamics version 3 installed, but struggled using this effectively due to other systems not being integrated with CRM and also their lack of internal knowledge and training using CRM. With no support contract, CRM wasn't working for them.

Shelley Johnston Acting Knowledge Quality & Process Manager at The Information Centre for health and social care, says "We knew CRM could do so much more, and we were determined to get it right for us. I looked at the implementation tips from Caltech CRM and we started to talk to them to find out more about their solution and what they could offer."

Proposed Solution

Information Centre contacted Caltech. "They were like a breath of fresh air" says Johnston "Phil Callaghan, Dave Cockerham and the team took their time to understand our business and our process mapping. They get a real feel for what we wanted to get from CRM."

Caltech demonstrated CRM and show the functionality that would work for Information Centre. Rob Walwyn Caltech's project manager says, "We have really enjoyed delivering Microsoft CRM for The Information Centre. If there were any



hurdles identified on the project track, they were managed through successfully, working together with Information Centre and communicating with them.”

Ensuring Success

Caltech integrated the CRM package with Outlook, and gave lots of useful advice of who it works best for Information Centre. “The support contract was very helpful, you can just call and speak with the support at Caltech. There are very patient and nothing is too much trouble. Caltech really want CRM to work for you,” says Jean Penrose from Information Centre.

Expertise

Johnston goes on to say, “The expertise Caltech have with CRM is visible. They have a great team that work so effectively together. We found that everything is “doable” or there was a good work-around solution”.

The support development at Caltech mapped out all the workflows to ensure that the package would work well at go live.

Getting more from CRM

As well as upgrading their solution to version 4 Microsoft Dynamics, Information Centre also ‘added on’ a free of charge accelerator package – Event Manager.

“This is invaluable” says Johnston.

Prior to the event manager package, Information Centre had an access database which was working on its own and data had to be manipulated and pulled out of it. Caltech have ensured that the branding and text was ready for Information Centre to use easily on go live. The Event Manager system is up and running and external delegates for events can register through this online and it feeds into CRM.

Johnston says “we now use this tool for managing all our conferences, delegate badges and lists.”

The benefits The NHS Information Centre have from working with Caltech are:

- Exceptional support
- No over-convoluted processes around SLAs and other processes
- Training
- Experience of working with other customers and their wealth of expertise
- They are using CRM systems themselves



Future-proof

Spending time with Caltech and developing through install has given Information Centre more expertise in house to use the system.

Information Centre has plans for their marketing communications team to start using the system shortly, and there will be no need for information to be held in spreadsheets. CRM will be tracking who came to an event or received information and CRM will also be used to send data out to key people, easily segmenting those contacts to who the information is most pertinent to.

The team at Information Centre is constantly changing and their systems need to be future-proof. Shelley Johnston feels that using Caltech has done just that.

Information Centre recognises that the uses for CRM are endless and they are looking forward to working with Caltech to develop their service management usage of CRM and deliver more for Information Centre.

Phase II

Update : December 2010

Caltech CRM are updating codes and streamlining the NHS Information Centre's CRM system further. There are more reports required thus more information capture requirements, and some system changes to support altered processes. John Hesman CRM developer, David Taylor technical director and Rob Walwyn project manager for Caltech CRM are successfully managing this through.

About Caltech

Experts in the application of CRM (Customer Relationship Management); highly skilled in the software we implement, Caltech work hard with clients to understand their business requirements and deliver to their needs.

Established in 1999 and based in Yorkshire, Caltech are specialists in CRM and we are totally focused on our customers. We have consistently, and successfully, implemented CRM solutions from small 2 – 3 person companies, to some of the largest organisations in the FTSE 100.