

COMPANY CASE STUDY

ARTHUR ELLIS: MENTAL HEALTH SUPPORT



COMPANY BACKGROUND

Arthur Ellis: Mental Health Support is an organisation, providing support to both children & adults to help recover, manage and maintain their mental health. The organisation recognises that only 1 in every 8 adults receive treatment for their mental health, and nationally, 75% of all children and young people are unable to access any support at all. Therefore, in 2017, Arthur Ellis was founded to help the nation become #IndependentFromIllness. Since then, the organisation has grown to support people across the country and has recognised the need to implement a Custom Business Solution to assist their growth.



CHALLENGES

- › Previously managing all data and records in complex spreadsheets
- › Required a new solution to manage their records, sessions, billing process and reporting
- › Arthur Ellis: Mental Health Support needed a system that would provide a stable platform to build on and enable them to be as efficient as possible, as the organisation grows



SOLUTION

- › Implemented a Custom Business Solution
- › Developed a structured application process for mentors
- › Implemented an Outlook Integration
- › Implemented a Xero Integration to support the billing and invoicing process
- › Implemented Dashboards within the system, enabling management to gain a comprehensive real-time view of all key data



BENEFITS

- › Time saved on admin
- › Improved information accuracy and process efficiency
- › Enhanced professionalism
- › Increased visibility
- › Enhanced data security
- › Future-proof system

CHALLENGES



Prior to working with Pragmatiq, Arthur Ellis: Mental Health Support (AEMHS) were managing all data and records across static and linear spreadsheets. These spreadsheets were lengthy and complex, meaning challenges arose when key information was required quickly. By managing data in this way, it also meant that duplication was a risk and increased the chances of errors being made in the system.

For AEMHS, there are multiple types of key records that are managed; Clients (Service Plans & Session), Corporate, Supporters and Mentors. By using spreadsheets to store these records, it became difficult to link them together which also increased the time taken to gather information. Having the records related and easily accessible was one of the key goals to be achieved in the solution we implemented. Alongside this, any notes around the support sessions were stored in spreadsheets. For every one of these, three Word documents were manually generated and filled out, then key information inputted separately. This was a time-consuming process and notes were difficult to refer to.

Another key element of AEMHS' process is the Referrals they receive. These were previously submitted on the website, however, there was no integration to the rest of the process due to using manual systems (spreadsheets). This meant that any information was captured in an email and would need to be manually inputted into the system. Additionally, when this referral then became a client, the record would need to be moved through the different stages of the on-boarding process. Again, this would be undertaken manually and would require new records to be set up each time, with the notes being stored against them.

Another inefficient element was the billing and invoicing process. Due to the various service plans available and the different methods of paying (per session, as a course or an organisation covering multiple sessions), this process was cumbersome. Manual effort was required to gather the data from the spreadsheets, calculate the invoice, send and track the progress. Another one of the goals to be achieved with the solution was to streamline this element and make it more efficient.

Finally, AEMHS faced challenges with reporting and had no way of gaining a real-time view of their key information. Each month, time would be spent gathering data from the spreadsheets, reviewing the figures and pulling reports together. This process resulted in wasted time and a lack of visibility for making strategic business decisions. Through the implementation of a new solution, the organisation required a quick view of key statistics – those who they are supporting, overall client needs and trends, past/future sessions, etc.



SOLUTION



After gathering AEMHS' requirements, it was clear that their needs did not match standard Dynamics 365 functionality. Instead, we designed and implemented a Custom Business Solution with only the functionality they required, which could be expanded as the organisation grows.


Within the Custom Solution, AEMHS can manage all stakeholder records and have links between them. For example, a Client record can have their supporters and mentors linked or session notes can be tracked directly against a Client's Service Plan record, improving the speed to access the information. Additionally, related documents can be linked to the record, as the seamless integrations between Office 365 and Dynamics 365 are leveraged, increasing efficiency and productivity.

We developed a structured application process for mentors. This enabled AEMHS to gain an overview of their applications, what stage they are in and make sure they are being moved through the process effectively. This also enabled that the right level of information and documentation was being captured in the recruitment process, to ensure compliance.

We also implemented an Outlook Integration, enabling any upcoming sessions that Mentors schedule, to sync with both their calendar and the session record in the system. Previously, when a session was booked it would require manual effort in both diaries and increased the chance of errors or duplication. Within the new solution, this process is now structured and automated, saving admin time and ensuring that they can be easily monitored.

A Website Integration was also established around the Referral Forms. Due to the amount of information gathered at this stage, the previous manual process of inputting data was time consuming and inefficient. This integration means that when a referral form is submitted, it integrates directly with Dynamics 365 and creates a Referral record. Following this, when a referral is qualified, a service plan is automatically created, using Power Automate, which future sessions can then be added to. Also, around the Referral Forms, additional security has been implemented by leveraging the security model within Dynamics 365 and customising this to fit. This means that different levels of mentors have only the permissions they require and ensures compliance across the organisation.

To support the billing and invoicing process, a Xero Integration was included, allowing sessions to be tracked and billed for automatically. The system now recognises the different service plans, can gather all the sessions in a set time period and then invoice for them. Finally, we implemented Dashboards within the system, enabling management to view key data in real-time; completed sessions, service plans, overall client needs, etc. As a result, management have an increased insight into the business, allowing them to make more informed, strategic decisions and save time manually generating reports.



“Our mission is to ensure that meaningful mental health support is accessible and we aim to see everyone within 1 week of referring to our service. With demand for mental health and emotional support increasing exponentially through the coronavirus pandemic, we really needed to get systems in place to help us cope with the high demand whilst delivering against our mission and growing our team. This is why we decided to engage with Pragmatiq, to help us build a bespoke system that would fulfil those elements. It was clear that an off-the-shelf package wouldn't give us the security, efficiency and ease of use that our Dynamics system would. The work was planned out really effectively, giving us guidance based on their experience, which also made for the system to be built quickly with only small adjustments necessary before going live. Since the system has been built, our admin time has been significantly cut down, helping us to stick to our mission, even when we grow. Ultimately providing people with mental health and emotional support as quickly as possible.”

JON MANNING - CHAIRMAN & CEO AT ARTHUR ELLIS: MENTAL HEALTH SUPPORT

BENEFITS



Through the implementation of our solution, the following benefits were realised:

- > **Time saved on admin** – As a result of the Custom Business Solution and Integrations within the Microsoft ecosystem, Arthur Ellis: Mental Health Support now saves considerable time on administration tasks. These vary from manually keying in data from website referrals, creating and filling out session notes, sending out session invites and completing the billing process.
- > **Improved information accuracy and process efficiency** – Previously, most of the information was stored in spreadsheets and lacked structure. By implementing a Custom Business Solution, Arthur Ellis: Mental Health Support now have all data stored on one system with systemised processes in place. This has increased overall visibility, the accuracy of information and made the organisation more efficient.
- > **Enhanced professionalism** – As admin processes are now much quicker and automation is in place (such as the invite scheduling for sessions) the journey for a client is now quicker and ensures that the mentors have everything they need in one place, enhancing the professionalism of the organisation.
- > **Increased visibility** – Key information is now displayed in a less overwhelming format, enabling users to clearly identify relationships between records in a timely manner and spend less time searching through irrelevant information. Displaying key data in dashboards within the system also enhances the reporting capabilities, a previously time-consuming and manual process which Arthur Ellis: Mental Health Support spent a considerable time completing. As a result, management can now make more informed decisions and see everything they need, in one place.
- > **Enhanced data security** – We leveraged the security model within Dynamics 365 and customised it to fit Arthur Ellis: Mental Health Support specific needs. This ensures confidential data can only be seen by those with specific permissions and enhances the charities overall data security and compliance.



“This project is a good example of how the Power Platform can support an organisation that doesn’t fall under traditional Sales or Customer Service. The solution we have delivered enables Arthur Ellis: Mental Health Support to work smarter, by reducing admin time around session bookings and payments, along with giving management better insights into the business operations.”

JAMIE EVANS – TECHNICAL DIRECTOR AT PRAGMATIQ

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