

PRAGMATIQ

COMPANY CASE STUDY

# LAGAN'S FOUNDATION



## COMPANY BACKGROUND

Lagan's Foundation is a charity that supports families who have babies and children up to 5 years old, diagnosed with heart defects or feeding difficulties. Their purpose is to provide unique at-home and in-hospital care to support parents in their caring role.

The charity has grown quickly since it was established in 2013, supporting a large number of families across the North-West. In order to support them, Lagan's required a bespoke CRM solution which Pragmatiq was able to deliver



### CHALLENGES

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- › Needed to upgrade their current systems to a more centralised and efficient approach
- › Searching for information in the previous system was time-consuming and laborious
- › Lacked visibility of their key channels and the ability to identify new opportunities
- › Aim to provide structure and visibility across key stakeholders, streamline their Carer & Volunteer application process and declutter an overwhelming database



### SOLUTION

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- › Identified how records were managed and displayed, mapping out a new process to show required data only
- › Redesigned and customised the user interface to display only relevant information
- › Architected a solution to manage and track the Carer & Volunteer application process
- › Integrated Microsoft Forms and Dynamics 365 using Power Automate
- › Implemented a SharePoint integration to store relevant documents



### BENEFITS

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- › Improved visibility & access to information
- › Improved productivity
- › Increased user adoption
- › Optimised application process – significantly reduced the Carer & Volunteer application time and reduced the potential of gathering duplicate information

## CHALLENGES



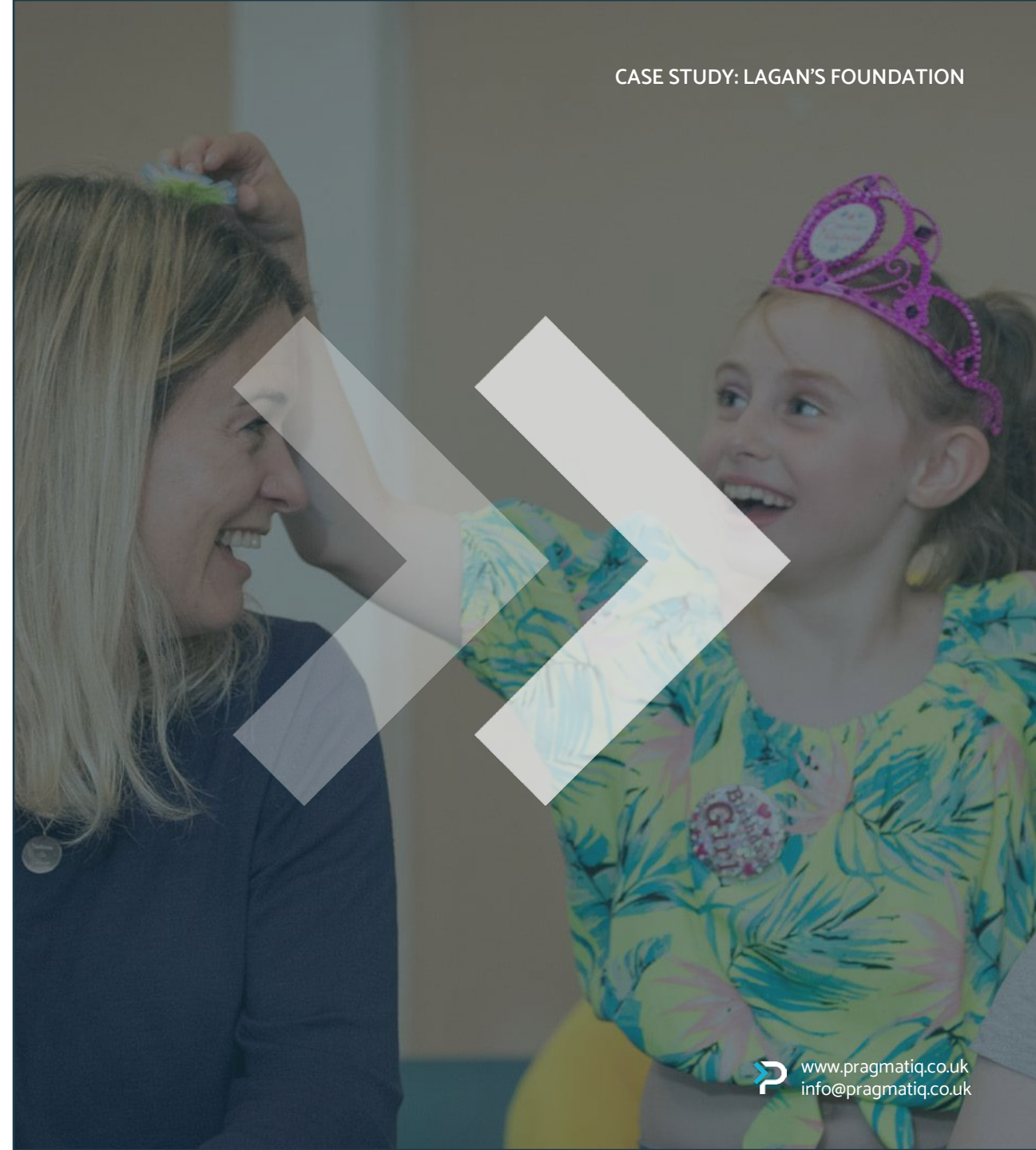
To support the Lagan's Foundation's growth, the organisation identified the need to upgrade its systems to a more centralised and efficient approach. Lagan's required a platform that would provide the structure and visibility across their key stakeholders (families, children, medical representatives, etc.), streamline their Career & Volunteer application processes, and declutter an overwhelming and poorly designed existing database, to improve access to key information.

Before engaging with Pragmatiq, Lagan's relied on an unstructured and unreliable Carer & Volunteer application process. The main channel for Carers & Volunteers to apply was online, submitting a form which then would be sent directly to the organisation's previous system. Challenges arose when these applications needed to be tracked on progress and followed up, yet there was no way of segmenting this data in the system and viewing what stage applicants were at.

Another inefficient element was access to key information. Within the previous system, all information relating to any record (child, family, donor, volunteer, worker, etc.) was previously shown on one screen, with no structure or way of defining a record type. This meant that searching for information was time-consuming, laborious and as a user, the experience of navigating this data was overwhelming. Donor engagement and fundraising were also problematic, as the charity lacked visibility of their key channels and the ability to identify new opportunities.

Overall, the key goals to be achieved with the solution we implemented are outlined below:

- Increase operational efficiency
- Improve the speed of access to key information
- Optimise the application processes



## SOLUTION



Lagan's Foundation recognised that Microsoft Dynamics 365 would be the solution to achieve the above goals, so we worked with Lagan's to understand their current processes and implement a solution.

After gathering business requirements and identifying how the information was managed and displayed for records, we mapped out a process to segment the data and show only what was required. To accomplish this, we introduced additional elements to the system, enabling applications to be tracked and taken from one stage to the next, a process that was previously not managed. By redesigning and customising the user interface to only display relevant information, we added structure to a previously overcomplicated and overwhelming process. Users would now be able to segment data and identify the key relationships between records. For example, a user could view a child record and see the family relation, doctor, nurse, and social worker records that were associated with that child.

We then reviewed their current application processes for Carers and Volunteers and identified clear stages within them, enabling us to architect a solution that managed and tracked the application process end-to-end. An integration between Customer Voice and Dynamics 365 using Power Automate was created, so when an interested applicant submitted a form on their website, an application record within Dynamics would be populated with the relevant data in a clear and structured way. This provides Lagan's with visibility of the current stage and information already gathered, enabling them to quickly identify further information needed, track the application and promote this through to live Care or Volunteer.

On top of this, we implemented a SharePoint integration to store relevant documents such as certifications, forms of ID, etc. against the relevant records such as applications, Volunteers, Carers, etc. Again, ensuring that all the relevant information is in one place and enabling Lagan's employees to access the information quickly.

In addition to this, we implemented the new Microsoft Dynamics 365 Unified Interface, meaning that the performance of the system improved, the information could be accessed quicker, and data appears cleaner and less cluttered, making it simpler to work with. This upgrade also enabled more functionality and supported us to design a system for Lagan's that was efficient and dynamic.



**“This project was not only rewarding for the client but also for us internally. Early on we could clearly see how we could take a usable system to something that provides structure to their daily tasks, and believe we have implemented a system which their staff enjoy using every day and will make Lagan's Foundation more productive as an organisation.”**

JAMIE EVANS – TECHNICAL DIRECTOR AT PRAGMATIQ

## BENEFITS



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

**Improved visibility and access to information** – The information is now displayed in a less overwhelming manner, enabling users to clearly identify relationships between records in a timely manner and spend less time searching through irrelevant information. The enrichment of this data also improves uses for fundraising and marketing purposes.

**Improved productivity** – By restructuring some of the internal processes, including the application processes, workers now have a clear structure around their daily workloads and can easily identify records that require further action. For example, they can see what stage of the process an application is at and what information is left to collect. This also improves productivity and provides management with clear visibility of the organisation.

**Increased user adoption** – The system has been specifically designed to hold data in an intuitive way, leading to strong user adoption. Users can also personalise their views to display only what is relevant to them, in contrast to their previous ‘one size fits all’ scenario.

**Optimised application process** – Due to a lack of structure before, applicants’ information, training, and journey were complex to track. The structured process within Dynamics optimises both the internal and external application experience, reducing wait time around applicant response and reducing the potential of gathering duplicate information.



“Pragmatiq were recommended to us via a networking connection in Manchester. Upon speaking to the company, they seemed very knowledgeable and confident they could repair our unusable Dynamics system which had been built by a different partner.

From the first face-to-face consultation, it was clear to see Jamie had the full knowledge around our intentions and understood our business model and had actually created something similar in the health profession elsewhere. From that point, we felt confident to progress into a full development project. The results were quick and impressive, offering us a totally up-to-date platform with all of the automation we had originally asked for.

We are keen to continue to work with Pragmatiq and look to develop the system again in the future.”

CARREN BELL – FOUNDER OF LAGAN’S FOUNDATION

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