

COMPANY CASE STUDY

MACINTYRE



COMPANY BACKGROUND

MacIntyre is a national charity, providing learning, support and care for children, young people and adults with learning disabilities. The charities services range from employment, supported living, registered care and more. Established in 1966, MacIntyre has grown to support people across the country and has recognised the need to implement a Bespoke CRM solution to aid their growth.



CHALLENGES

- › Previously managing data and communication across disconnected systems, such as excel spreadsheets and email
- › No centralised database of customers, stakeholders and current contracts
- › Referral and Tender Management process also previously managed manually
- › Cumbersome reporting process and lack of management visibility for making strategic business decisions
- › Needed to implement a solution to automate these manual processes



SOLUTION

- › Designed and implemented a Bespoke CRM solution, built on Microsoft Dynamics 365
- › Reviewed the opportunity and pipeline management process
- › Integrated Outlook and Dynamics 365
- › Reviewed the referral and Vacancy Management Process and implement functionality to provide visibility of this
- › Implemented Power BI



BENEFITS

- › Optimised referral and tender management process
- › Improved operational and process efficiency
- › Increased employee productivity
- › Increased insight for management decision making
- › Enhanced data security

CHALLENGES



Prior to engaging with Pragmatiq, MacIntyre was managing data and records across disconnected systems, such as excel spreadsheets and email. These complex spreadsheets could only be accessed and understood by specific people in the organisation, meaning challenges arose when key information was required quickly. By managing data in this way, it also meant there was no centralised database of customers, stakeholders and current contracts, making contract management overcomplicated and thus increasing the potential to miss out on opportunities for potential funding, donations, etc.

In addition to this, internal communication and correspondence with customers and stakeholders were via email. This manual process hugely impacted productivity, as key information was stored within lengthy email threads. It also increased the chances of data duplication due to not having the ability to track what has been actioned and what tasks are left outstanding. Lack of visibility amongst the rest of the team was also a concern of the charity and one of the key goals to be achieved with a new CRM solution.

As a national charity, MacIntyre receives referrals and apply for tenders from across the country. The Referral and Tender Management process was previously managed manually, with no way of tracking the status of referrals and upcoming renewals and proactively reminding employees of due dates. The challenges around this process became apparent when deadlines were approaching and due to lack of tracking, had to be completed in a short timeframe. MacIntyre recognised that this process could be optimised and was one of the main goals to be achieved through the implementation of a Bespoke CRM solution.

Another inefficient element was the manual reporting process. Each month, hours would be spent gathering data from multiple places, tracking key figures and then pulling reports together. This cumbersome process resulted in wasted time and a lack of management visibility for making strategic business decisions and forecasting; such as number of referrals, current contract values and vacancy management as a part of the charities 'supported living' service.



SOLUTION



After gathering MacIntyre's detailed requirements, we designed and implemented a Bespoke CRM solution, built on Microsoft Dynamics 365. This would support the management of Sales and Business Development and replace most of the manual processes the organisation previously used.

Firstly, we reviewed the opportunity and pipeline management process which was previously tracked via spreadsheets and email. Within the system, we introduced the leads and opportunity functionality, enabling MacIntyre to track all opportunities across their business development activities; this increased visibility for users and ensured that information is stored in one place for easy access and tracking.

Alongside this, we introduced an integration between Outlook and Dynamics 365, allowing any email correspondence to be tracked and associated with the opportunity, overcoming the previous challenges around email communication. We also implemented functionality to support with Tender Management, allowing MacIntyre to track key stages of the tender process, relevant documents, deadlines and sign off points.

We then reviewed MacIntyre's Referral and Vacancy Management Process, which monitors their vacant accommodation, as part of their supported living service and any referrals they have which require this service. Previously, this process was managed manually via spreadsheets, making it hard to gain full visibility of vacancies and spaces to be filled. We implemented functionality within Dynamics 365 which enables vacancies to be tracked within the system and referrals to funnelled into this particular area. This provided full visibility around gaps to be filled and a structured process to do so, alongside providing a focus for business development activities.

Another key element to the CRM solution was Contract Management. We implemented functionality within Dynamics 365 which enables MacIntyre to track their current contracts and the details within those contracts for all the commissioning authorities that they work with. This enabled Sales management to track revenue related to new services, existing services and uplifts across all the business areas and authorities that they work with.

Finally, we implemented Power BI, transforming the previous cumbersome and time-consuming reporting process. We created a management dashboard giving visibility into leads, opportunities, contracts, vacancies, referrals, tenders, etc. As a result, managers would gain increased insight into data, allowing them to make more informed strategic decisions.



“We commissioned Pragmatiq to provide us with a bespoke Customer Relationship Management (CRM) system using Microsoft Dynamics. The team at Pragmatiq very quickly gained a thorough understanding of our complex delivery model and created a solution that has had a positive impact and really added value to our work. Pragmatiq were focused in their approach and delivered to tight timescales, as well as being a pleasure to work with.”

NATALIE MACPHERSON - DEVELOPMENT DIRECTOR AT MACINTYRE

BENEFITS



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

- > **Optimised referral and tender management process** – As a national charity, referrals and tenders span across the country, so having visibility and control of their referrals and tender management process is essential. Dynamics 365 has provided a structured approach to this process, enabling MacIntyre to gain control, track stages/renewal dates and follow up on tenders and referrals; ultimately closing more business.
- > **Improved operational and process efficiency** – By implementing a CRM solution, MacIntyre now has all data stored on one system. Dynamics 365 has increased visibility for the whole team, streamlined operational efficiency and has reduced the need for data duplication in multiple spreadsheets.
- > **Increased employee productivity** – The leads and opportunities functionality within the CRM has provided structure to the business development process, so users are able to view open opportunities and prioritise which to focus on. Key communication and files were previously sent by email, which wasted time searching for information. Due to the Outlook and SharePoint integration, files are now integrated with the system so employees can easily access key information. This increased productivity and reduced admin means employees can spend more time on the key tasks within the business.
- > **Increased insight for management decision making** – We implemented Microsoft Power BI to enhance reporting capabilities, a time-consuming process which was previously completed manually. MacIntyre can now access data in one central application, real-time and make key decisions based on accurate data, which isn't time-consuming to pull together.
- > **Enhanced data security** – We leveraged the security model within Dynamics 365 and customised it to fit MacIntyre's specific needs. This ensured confidential data could only be seen by those with specific permissions and enhanced the charities overall data security.



“We took the time to really get a solid understanding of all the different elements within MacIntyre. This enabled us to design and develop a solution that focuses around driving efficiencies, tracking key elements of their business and gaining a clear insight into their revenue and finance performance.”

JAMIE EVANS – TECHNICAL DIRECTOR AT PRAGMATIQ

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