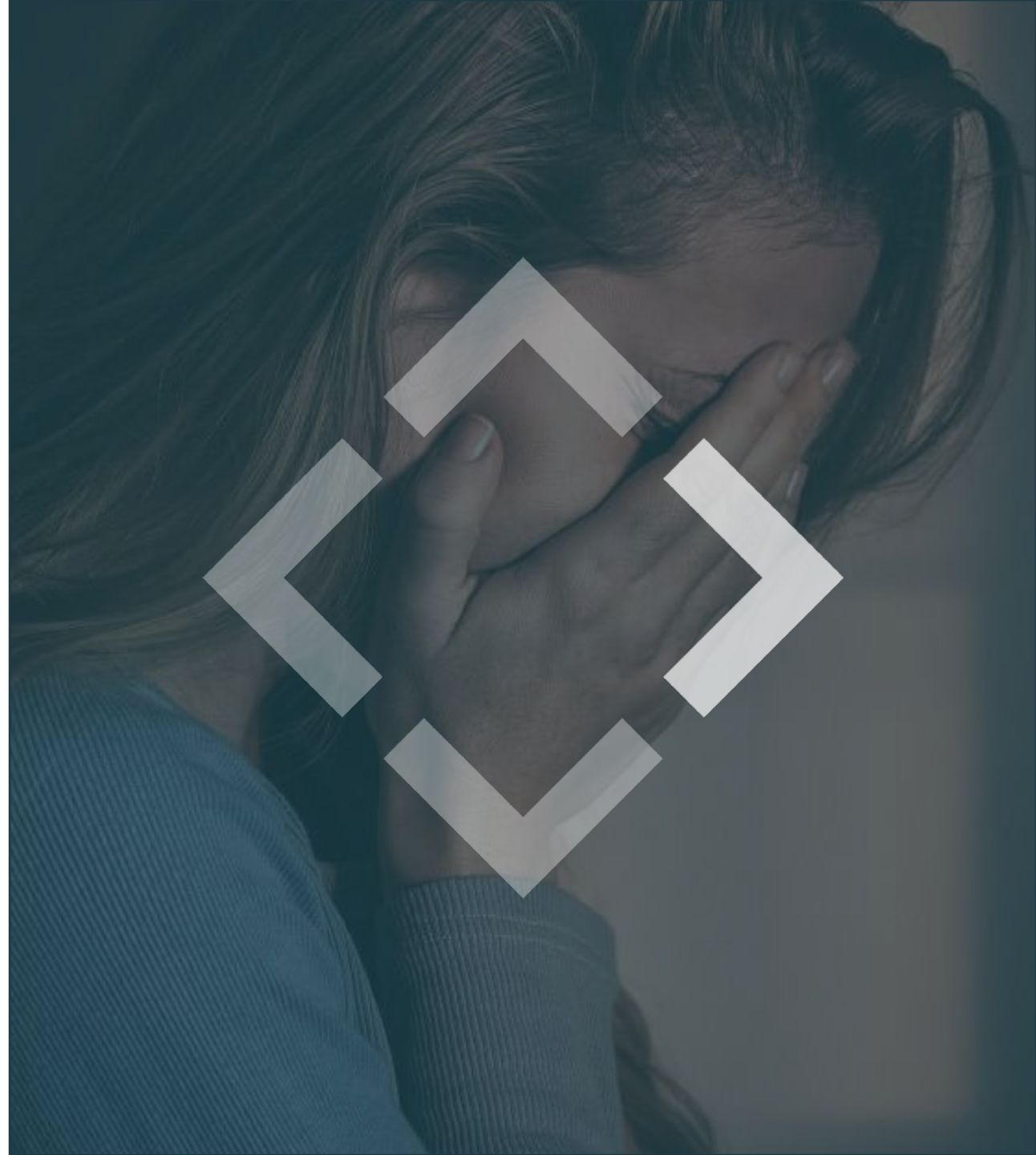


COMPANY CASE STUDY

TALKING MATTERS SEFTON



COMPANY BACKGROUND

Talking Matters Sefton (TMS) is part of the national Improving Access to Psychological Therapies (IAPT) programme. It is a free, confidential service designed to help anyone aged over 16 in the South Sefton, Southport, and Formby areas to deal with common mental health difficulties. These may include depression, anxiety, panic, phobia, obsessive-compulsive disorder (OCD), or post-traumatic stress disorder.

The service is overseen by the organisation Mental Health Matters, who recognised that their current setup did not meet the needs of Talking Matters Sefton and reached out to Pragmatiq.



CHALLENGES

- IAPTUS lacked configurability and did not match the specific Needs of Talking Matters, post the initial referral
- Previous referral process was time-consuming and manual which sometimes resulted in a backlog
- Clients required to answer a preassessment questionnaire, which was previously managed manually by an internal resource. This laborious process often resulted in the client not being seen as quickly as they could be
- Required a system that could automate and support this process
- Need for this solution was immediate and required within a matter of weeks



SOLUTION

- Implemented a solution built on Microsoft Power Apps, to manage the referral process
- Solution allows Talking Matters to automatically send a Customer Voice survey to a new client referral, with the responses then feeding back into Dynamics 365 system
- Solution creates a prioritised work list for staff members
- High-level information displayed against a client referral record, enabling staff to see at a glance those who are more at-risk
- Different views introduced in the system to enable internal staff to get an overview of the various stages that referrals were in and act on these as required



BENEFITS

- Quick resolution to an urgent need: Talking Matters approached Pragmatiq with an urgent need for the solution, which was delivered in just 3 weeks
- Timely response to referrals: Talking Matters Sefton now saves considerable time on administration tasks around the referral process and has reduced their lead time by half
- Increased visibility: Key information is displayed against the referral record, enabling staff to quickly identify clients that need urgent attention

CHALLENGES



Due to the nature of Mental Health Matters, the organisation must use IAPTUS; a specially designed system to deal with the majority of their services. However, it lacked configurability and did not match the specific needs of Talking Matters Sefton, post the initial referral where technology and automation were required to execute the preassessment process.

Referrals are an incredibly important part of Talking Matters Sefton's process and are also time-sensitive, as people are being referred due to mental health challenges and need support as soon as possible. Previously, this was a time-consuming and manual process which sometimes resulted in a backlog of referrals.

As part of the referral process, clients had to answer a preassessment questionnaire, which was previously managed by an internal resource, to arrange to speak to the client in person/over the phone. Due to the manual nature of this task, it often resulted in the client not being seen as quickly as they could be.

Talking Matters Sefton required a system that could automate and support this process. Questionnaires need to be sent to clients, with the responses and relevant data coming back into Microsoft Dynamics 365, alongside a prioritised queue of clients that need to be dealt with as a matter of urgency.

The need for this solution was immediate and it was crucial that Pragmatiq could deliver within a matter of weeks.

SOLUTION



We implemented a solution built on Microsoft Power Apps, to manage the referral process. The solution allows Talking Matters to automatically send a Customer Voice survey (preassessment questionnaire) to a new client referral. Once filled in and submitted, the response then feeds back into their Dynamics 365 System, creating a prioritised worklist for staff members to onboard new clients onto the service.

To trigger this process, every day Talking Matters exports data from IAPTUS and imports it into Dynamics 365. The automation then kicks in to automatically send the survey to referrals via email or SMS, depending on what information is provided.

This eliminated the manual effort that was previously required around the surveys and significantly cut down the time between the initial referral and the follow-up.

We also created a customisation in the existing Dynamics 365 system that presents high-level information against a client referral record, enabling staff to see at a glance those who are more at-risk.

Additionally, different views were introduced in the system to enable internal staff to get an overview of the various stages that referrals were in and act on these as required.



“Using the Power Platform has allowed the Talking Matters Sefton Service to assess clients presenting for mental health support in a timely manner, reducing the time from referral to assessment from 90 days to within the target of 42 days. The Platform flags risk to self or others meaning clinicians can prioritise contact, as necessary.

On at least two occasions this has led to the recognition and safe resolution of an immediate crisis situation.

It has also provided an opportunity to better manage staff wellbeing by allowing informed decisions on the choice of assessing practitioner, particularly for more complex presentations.”

AMANDA COMER - INTERIM HEAD OF TALKING THERAPIES

BENEFITS



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

- **Quick resolution to an urgent need** – Talking Matters approached Pragmatiq with an urgent need for the solution, in order to quickly manage a backlog of referrals and provide a systemised process for future. The Microsoft Power Apps platform provided a quick resolution, allowing the solution to be rolled out in just 3 weeks.
- **Increased visibility** – Key information is now displayed against the referral record, enabling users to clearly identify the needs of a client and the stage of the process they are in, to identify clients that need urgent attention.
- **Timely response to referrals** – As a result of the custom solution, Talking Matters Sefton saves considerable time on administration tasks around the referral process and has reduced their lead time by half. Due to the automation, clients now receive a preassessment questionnaire upon submitting a referral, rather than waiting for this to be manually arranged and processed.

KEY STATS:

- A 2-hour workflow has reduced to 30 minutes,
- The throughput of appointments has more than doubled as a result
- The waiting list has dropped from 11 weeks to 4.5 weeks, better than the NHS SLA and will be totally cleared within 6 weeks
- Clinicians spend more time on clinical work, less time on administration
- The solution was rolled out in just 3 weeks



“This project is a great example of how standard features within the Power Platform can be leveraged to help structure and automate processes to reduce manual work and eliminate inefficiencies in an organisation. For this client, it was extra important, as the time saved means people who need mental health support, are now able to be seen quicker. We are proud that we could support Talking Matters Sefton with this project.”

JAMIE EVANS - TECHNICAL DIRECTOR AT PRAGMATIQ





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