

HEALTHY LIVING WESSEX IMPLEMENT SAGE CRM TO IMPROVE FIRM-WIDE EFFICIENCY AND PATIENT CARE

Jan Stevenson, Operations Manager at Healthy Living Wessex, talks about their business, what issues they faced and how they went about resolving them through the implementation of Sage CRM from e1 Business.

The Customer

Healthy Living Wessex is a not-for-profit Social Enterprise, funded through grants from organisations such as the Big Lottery and Sport England to deliver services in the local community for people to improve their health and well-being. We deliver weight management sessions and exercise classes aimed at people with health problems, such as heart surgery patients who need to take up gentle exercise with support rather than go to a gym. Support to people to take up exercise or change their lifestyle is given through Lifestyle Mentoring, where clients work on a one-to-one basis with a mentor who helps them to explore changes they can make that are realistic and achievable. Healthy Living Wessex also works with and is commissioned by Primary Care Trusts to deliver support for weight loss and exercise.

The Challenge

Statistical information regarding the take up of services was required to show achievement of the projects. This information was collected on an Excel spreadsheet and provided limited scope for managing large amounts of information. When the project became a Social Enterprise there was greater scope to grow the business which required much better management information. Quick access to data was also an issue for our staff when trying to deal with clients on the phone.

The Solution

The Primary Care Trust contract meant that we would be handling considerably more data and a spreadsheet would not cope with this. Healthy Living Wessex therefore needed a system which would handle large amounts of data, be used to quickly find the personal details of a telephone caller, could be used for several different projects, with the ability to expand as new contracts came on stream, and could provide management information reports easily from any of the data fields. We had considered an Access database which would have been cheaper than a CRM package. However, this type of database relied upon the person who set it up to be available to support and make changes and this seemed to be an uncertainty. Implementation also seemed to be slow. We decided on a CRM system as it offered easier customisation, better and more detailed management reporting and could be implemented quickly, so suited the immediate business need.

The Decision

Healthy Living Wessex looked at a number of CRM packages and chose Sage CRM because we already had Sage accounting and felt comfortable about using a similar package. We chose e1 Business to provide our Sage CRM package because of their track record and because we felt comfortable with their representatives when we met. We felt that we were given clear information about what the package could deliver and that the representatives quickly grasped an understanding of our business so that they could tailor it to meet our needs. We did not feel unduly pressurised to take on more customisation or services than was necessary.

"We felt that we were given clear information and e1's representatives quickly understood our business."

Jan Stevenson, Operations Manager, Healthy Living Wessex



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Implementation

Healthy Living Wessex uses Sage CRM to record information about all of the clients who use our services. People are usually referred to us by their GPs and CRM also holds contact data for all GP practices. Staff are logged in to CRM all day and have instant access to data when a client calls. Information updates are input whilst the client is on the phone. The system is used to track clients' progress in losing weight as information is fed back from weight loss groups. The system provides a comprehensive record of all contacts with a client whether by phone or letter. Some clients have questionnaires to measure their well-being prior to commencement of a programme and also at the end of the programme. The data from these questionnaires is loaded into CRM and can be reported on. That data can then be exported and transferred to the organisation who is evaluating our performance who can merge it with data from other Healthy Living Centres. CRM enables us to create template letters which can be sent to groups set up on the system. This is useful for marketing our new products or sending out the same letter to a number of people.

Implementation took about 6 weeks and ran according to plan. Throughout the implementation e1 Business made sure that they understood what was required and met our expectations. Everything went smoothly and we had very good training to use the system. We have had excellent support since the system was installed and queries are dealt with quickly and comprehensively.

The Results

Sage CRM has enabled staff to have instant access to clients' information and the progress of their referral when they phone. Comprehensive information can be obtained for our sponsors and the Primary Care Trust which enables them to be confident about the service we are providing.

Most importantly, we are awaiting the confirmation of two more contracts with the Primary Care Trust which are based around the use of the CRM package, and the management reporting that Sage CRM allows us to provide to the Primary Care Trust is a key factor in the award of these contracts.

Future Plans

We will be expanding the number of users when we are awarded the new contracts. We have also upgraded our licences to concurrent licences, which gives us a more flexible option for giving access to people who only need occasional use of the system.

We will also be using the CRM package to manage training events. This will include details of the venue, the trainers and the attendees. We will be using the fact that we have Sage CRM when we do marketing.

About e1 Business

e1 Business specialise in helping customers to improve their productivity and reduce costs through the effective implementation of business technology and strategies. Our expertise includes the Sage Customer Relationship Management (CRM) range, the Sage 200 Suite and Project Management software.

e1's customers' installations range from 5 users to over 2000, all requiring highly professional support, and we have experience in helping our clients to get the most out of their systems, with emphasis on increasing user adoption.

Working across a range of different industries, e1 has helped deliver measurable business benefits from its solutions. e1 Business is committed to providing solutions that fit your business and meet your on-going objectives.

Visit www.e1business.com for more information.

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