pact

CUSTOMER:
Pact Group

INDUSTRY:
Health & Community Services

LOCATION:
Dunedin, New Zealand

PRODUCT:
Sage CRM

Mental Health Support Group Makes a Pact for Better Patient Service

"The client management system has enabled Pact to be seen as a service leader in a way that we weren't before. We're recognised for having IT knowledge and skills, as well as supporting people with disabilities."

DONALD SHAND, DIRECTOR OF OPERATIONS, PACT GROUP

THE SCENARIO

Pact relied on manual, paper-based methods to manage its client relationships. Each and every client had a file containing many documents that was used to record interactions, observations, incidents and activities as the client moved from one programme to another. Reviewing an individual's progress required locating and searching the physical file. Reviewing the progress of a group of clients required examining each and every individual's file. There were no shortcuts.

It was a labour intensive method that made it difficult to gain a quick overview of an individual's involvement with Pact. It also made reporting to government funding bodies extremely difficult. Donald Shand, Pact's Director of Operations, explains, "The people who come to us are often referred from two or three sources and there may be funding associated with each source. So a single client, for example, could have elements of funding from Social Security and from the Ministry of Health. They may also have their own personal allowance. Therefore, we need to be confidently able to track all the revenue associated with a person, as well as all the inputs such as staff time and resources applied on their behalf."

"Throughout the person's stay we also have to collate and monitor progress reports from various sources such as mental health clinicians within the hospital systems, from GPs (general practitioners) and our own in-house specialists. It's quite a complex set of inputs," Shand notes.

In 2008, in an effort to ease the paperwork burden, improve the quality of customer services and improve reporting accuracy, Pact decided to invest in a software programme that would allow staff to record, track and manage all client activity in progress. Ideally, to cater for the diversity of skill levels among volunteers and staff, the solution would be one that offered as close a match as possible to the organisation's existing paper trail.

ABOUT PACT GROUP

Pact is a New Zealand-based not-for-profit organisation that provides support for approximately 800 people with intellectual or other disabilities and for those recovering from mental illness. Its extensive range of programmes include supported housing, day programmes, vocational assistance, community support, respite care and carer support, peer support and youth holiday programmes. The organisation operates three main branches which are located on the West Coast, Otago and Southland regions, and employs more than 300 staff.

ABOUT ENABLING

Enabling is the recognised leader in the provision and support of business management applications throughout Australia and New Zealand, especially in the areas of technical and development expertise, solution design and long-term customer service. With offices in Melbourne, Sydney, Brisbane, Auckland, Wellington and Christchurch, we have both strength in numbers and depth of expertise to support organisations of all sizes and with a multitude of requirements.

ABOUT SAGE CRM

Sage CRM is an easy-to-use, fast-to-deploy, feature-rich, low-cost, Internet-based CRM solution designed to introduce the real benefits of CRM to your organisation. Sage CRM uses industry-leading technology to foster better business practices and effortless information exchange throughout your organisation.

With Sage CRM, you can quickly analyse, manage, and synchronise sales, marketing and customer care activities across all points of contact. Regardless of how, when or where your customers, partners, and prospects choose to interact with your company, Sage CRM gives you a decisive advantage by providing comprehensive, easy-to-use tools to successfully manage these relationships. Sage CRM offers a full range of hosted or onsite deployment options, which means you get complete flexibility to run your business your way.

Integration with Sage ERP Accpac

Integration between Sage CRM and back-office accounting and financial applications provides organisations with a holistic CRM solution that offers a complete view of all customer interactions that is essential for making more insightful business decisions.

SOFTWARE CHOICE
- Sage CRM

THE REQUIREMENT

Initial investigation of off-the-shelf patient management and customer relationship management (CRM) packages failed to identify a suitable candidate, so Pact turned to IT business application specialist, Enabling, for help. Having been in discussions with Pact for more than a year Enabling was familiar with the organisation's requirements and capabilities.

Enabling recommended Sage CRM as a powerful software platform which also offered the flexibility for customisation to meet Pact's very specific client reporting requirements. In addition, Enabling suggested integrating the CRM application with Pact's website using Sage CRM Self Service. This would provide authorised staff and healthcare professionals with secure access to the client records from any location.

"With Sage we could have a readily learn-able product that was easy to operate and suitable for a largely unskilled workforce. All that was required was assistance from Enabling to conduct some modest in-house development," Shand says.

In late 2008, Enabling consultants began working with Pact staff to build a limited prototype of the system. One of the first challenges was to examine almost four boxes of client records and associated information that had been collated by Dita Ciulacu, one of Pact's volunteers. The boxes gave the team an idea of the enormity of the challenge ahead of them.

"The question was how we were going to collect this electronically so that it made sense to unskilled users," Shand adds. "What the Enabling team brought to the discussion was an intervention logic. They asked us what we were trying to achieve, then they applied logic to the design."

Over the next few months software wizards were developed to make the system as easy as possible for staff to use. Security measures were defined and built, and over 300 paper forms consolidated to fit the new processes. As the application was readied, rigorous testing and staff training were carried out, and in early 2009 Pact's Sage CRM system went live.

"What we achieved is a non-daunting user experience that allows a tech support worker with minimal skill to navigate a system that's reasonably intuitive – one that doesn't present too much difficulty when they need to do their own bit of data entry or when retrieving information," says Shand.

THE SOLUTION

Within a short number of clicks, managers and staff now have access to a wide range of client information. It's a much faster and more accurate way of finding out what is going on. Data can be analysed by site, worker or client, and the system provides performance metrics relating to activities such as turnaround time for clients.

The circumstances surrounding incidents such as threatening or unacceptable behaviour can be examined to try to identify contributing factors. The system even includes an alert facility that automatically emails Shand whenever an incident is reported.

"What it enables me to do is to see in real time what is happening with the clients and staff at any given moment. It helps me to feel connected with the operation without having to be everywhere at once. I feel that I'm reliably hooked into some very real information," he explains.

Reporting has improved in accuracy and in timeliness. Data for a key quarterly report required by the Ministry of Health, for example, is directly drawn from the system.

"It's saved a huge amount of time."

"The data was all available before. The difference that Sage has made is in terms of accessing and actually gleaning intelligible information from the data. We have reliable data sources that we can work with. It's an inordinately helpful position to be in," says Shand.

He is also quick to acknowledge the importance of Pact's IT service partner, Enabling. "They have been a really excellent organisation to work with. Enabling has been instrumental in us getting more out of the product than we otherwise might have. They're been consistent in their follow through, haven't oversold their capability and we've been continually surprised by the quality and depth of their team. From my perspective, they've been the perfect IT partner; a steady guide rather than an imposer of product," Shand concludes.

THE RESULTS

One surprising benefit of the system has been the development of greater IT confidence among Pact's staff. The system's ease-of-use and intuitive information flow have transformed the attitudes of staff who've never or rarely used computers in the past. Other, more experienced users have embraced the opportunity to become subject matter experts for their region. Dita Ciulacu, the volunteer who helped to define the information requirements of the CRM, found her expertise in such great demand that she eventually accepted a staff position with Pact. She's also been engaged as the Pact representative working with the Ministry of Health to assist other non-government organisations get their client management systems up and running.

In the years since deploying the CRM, Pact has periodically introduced modifications to the software in a bid to help users do even more. Shand believes this process of continual improvement will remain, noting, "Sage CRM is quite robust in terms of its ability to be adapted."

THE FUTURE

"At present, the core software gives us plenty of capabilities to work with and we know that we can further adapt and flex it for our own needs. It's a very useful capability to be able to develop more and glean more."

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