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*Rachel Churchman, IMS Manager  
The Health and Safety People*

## Overview

### Industry

Business Risk Assessment  
Consultancy & Training

### Business Situation

The Health & Safety People sought a new relationship management solution to help them improve their process efficiency, achieve greater reporting insight & share data throughout the organisation.

### Solution

Microsoft Dynamics CRM was deployed as an on-premise solution to over 60 users.

### Benefits

- Improved team communication through easy access to data
- Increased process efficiency through CRM workflows, automated processes & accounting software integration
- Real-time measurement of progress across all key performance indicators
- Targeted marketing campaigns
- Increased client visibility

The Health and Safety People Ltd (THSP) help businesses carry out their legal responsibilities in line with health and safety, employment and environmental legislation.

Their services include:

- Documentation and advice on safety, health, environmental compliance and employment law
- On-site safety audits
- Risk assessment surveys including fire, asbestos, dust and noise
- Accident investigations
- Legal indemnity insurance
- Accredited training courses across a wide range of health and safety and environmental subjects including first aid, plant equipment, safety awareness and site waste awareness
- Consultancy services to enable clients to attain ISO 14001 and BS OHSAS 18001

THSP's experience ranges from managing safety on the construction of some of the country's biggest and most prestigious projects, to helping small trades, restaurant owners, automotive mechanics and many more, effect cultural changes in their organisations. They make sense of the laws that govern all UK businesses and stand by their customers when they are needed.

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***This has included using automated emails in our telesales department allowing the team to stay focused on making calls and scheduling appointments.”***

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## **The Situation**

THSP were using Office Talk to manage their communications and contact relationships but a series of limitations were encountered as Rachel Churchman, THSP’s IMS Manager explains.

‘Office Talk was not adapting to meet our changing needs and its inflexibility was proving to be a risk for THSP.

The system was used by our internal team but information also needed to be shared with our external consultants and trainers; tasks were often duplicated before they could access this detail.’

THSP sought to identify a new solution that would:

- Provide a central database for all THSP client and contact data that would remove duplication of effort and be easily accessible to all internal and remote users
- Adapt to all their existing processes and enable workflows to be better optimised and streamlined
- Create better business intelligence through organisation-wide reports
- Deliver improved performance and instil confidence among users

## **The Solution**

A number of CRM providers were considered but THSP’s management team soon identified their preferred solution.

‘We found that Microsoft Dynamics CRM could achieve all of our priority requirements and could also be integrated with our Sage 200 accounting system to reduce data handling and improve consistency of customer data’, said Rachel.

Microsoft Dynamics CRM was subsequently chosen by THSP and deployed to over 60 internal and external users.

## **The Results**

In the 18 months since Microsoft Dynamics CRM was implemented Rachel says the team are delighted with the progress it’s enabled them to make.

‘The main benefit of using Microsoft CRM is being able to share the same detail with all our staff - wherever they work.

Everyone can now view an account history when they need to - our external workers no longer need to phone the office to ask for information; this has helped to bring the two teams together.

The integration between CRM and Microsoft Outlook works extremely well, in fact this is so good some of the team choose to work with CRM in Outlook alone!’

THSP had been using Microsoft CRM for about 7 months when Preact came on-board. An earlier provider successfully implemented the system but struggled to keep up with the company’s support and development requirements.

‘Preact immediately added value to our CRM and enabled us to get a lot more from its functionality’, Rachel continues. ‘An example of Preact’s input is how we use CRM to manage our training sessions.

‘We’d customised a CRM entity to track our courses and associated these with venues, trainers and delegates. However, delegates often attend several courses on the same day but our original implementation didn’t allow us to effectively connect these bookings.

‘Preact developed the functionality we needed to group courses, reflecting each delegate’s unique training path. This has enabled us to improve our pre and post-training communications.’

Microsoft CRM workflow automation has made a significant contribution to improving THSP’s process

***“From my experience I would recommend Preact to any organisation implementing Microsoft Dynamics CRM.***

***They tailor their approach effectively and have proved to be very innovative in developing and applying solutions.***

***Most importantly – they want to help their clients to experience the very best that CRM has to offer.”***

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efficiency as Rachel highlights.

‘CRM workflows have reduced the amount of double-handling tremendously. It’s enabled us to automate many of our routine tasks so our staff can concentrate on client focused activities.

‘This has included using automated emails in our telesales department allowing the team to stay focused on making calls and scheduling appointments.

CRM workflows have also helped us improve our training processes by prompting and creating tasks for our courses that involve accreditation bodies, trainers and post-course certificates.’

Microsoft Dynamics CRM has helped to connect THSP’s internal and external teams but retaining control of data remained an important consideration as Preact’s IT Manager, Ian Mennie explains.

‘To help THSP safeguard their data Microsoft CRM has been developed to restrict access to specific records. A combination of a record sharing plugin, javascript and security profiles rules have been applied that ensure users only gain access to authorised data.’

An improved reporting function was a priority requirement for THSP and Rachel says Dynamics CRM quickly provided the analytics they wanted.

‘Our business intelligence and reporting insight has improved greatly since we deployed CRM to the extent that Microsoft Dynamics has become the ‘one truth’ for the company.

Dynamic reporting has proved a major benefit as we’re now able to measure progress on all our key performance indicators and have this linked directly with our Integrated Management System.

These metrics give us clear visibility into

our current order book and prospective future orders which has made a real difference to the efficiency of our resource scheduling.’

The integration between Microsoft CRM and Sage 200 is another example of how THSP have been able to improve their internal processes by removing duplication.

‘Previously we entered the same information in CRM and Sage but with the two systems connected we can raise orders in CRM and send them to Sage 200 without having to replicate the same entries.’

When Preact began working with THSP the development of this integration created an immediate challenge as Ian Mennie comments. ‘The link between THSP’s Sage 200 and CRM databases uses a series of process triggers that initiate action but we identified this had been developed in an unsupported manner.

To ensure scalability so that THSP could further develop this functionality we rebuilt the integration using a combination of Dynamics web services and CRM workflows.

As an example of the tighter integration this has created, credit limits are sent from Sage 200 to Microsoft CRM with a rule applied that prevent sales users from activating new quotations if the total price exceeds an account limit.’

Further integration between CRM and external applications have been deployed as Rachel highlights.

‘Preact have proved very adept at recommending, and working with, third party solutions that plug-in to our CRM database. An example of this is the CoreMotives marketing suite.

Using Microsoft CRM we’re able to segment our clients and create

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marketing lists and with CoreMotives integrated we're also able to track email campaign responses. With the two combined this is helping our marketing efforts be more focused and relevant.'

Overall Rachel says the system has lived up to all their expectations.

'Microsoft Dynamics CRM has quickly proved an excellent resource to all our users because it facilitates improved efficiency and visibility. Our customer service operation is greatly improved by using CRM.

'Like any system it relies on the quality of information input to produce the required results. Training has proved crucial for gaining user acceptance and reinforcing the importance of enhancing data quality with every input.'

THSP have utilised Preact's managed support service, CRM Fusion. In addition to phone help this includes a bank of consultancy hours that can be allocated each month to develop Microsoft Dynamics CRM as Ian Mennie explains.

'The Fusion agreement has enabled THSP to prioritise their CRM requirements and phase work over several months. Some examples of completed tasks include report design, plug-in development, coding javascript and developing new workflows. These tasks demand different skills that many organisations would have difficulty sourcing internally.'

Rachel concludes that Preact's approach has been an important part of their success with Microsoft CRM.

'Preact are very proactive. From their first visit they took the time to appraise our CRM database and gave us valuable advice for how we could immediately implement improvements ourselves.

'At every step of our working relationship they've kept us informed. We schedule regular calls with our account manager when we're working on CRM developments and this works extremely well to keep all parties updated.

'Preact's support team are quick to respond to our questions whenever we need help and have been excellent in providing technical solutions. Their practical advice and expertise has enabled us to develop our user skills and help ourselves wherever possible.

'From my experience I would recommend Preact to any organisation considering implementing Microsoft Dynamics CRM, or already working with the system. They tailor their approach effectively and have proved to be very innovative in developing and applying solutions.

'Most importantly - they want to help their clients to experience the very best that CRM has to offer.'

## For more information

To find out more about Preact and Microsoft Dynamics CRM please call 0800 381 1000 or +44(0)1628 661 810

Or, visit [www.preact.co.uk](http://www.preact.co.uk)

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## About The Health & Safety People

Since 1992, THSP has been delivering health and safety services to businesses throughout the UK and Europe.

Today, THSP assist a diverse range of businesses with their many corporate responsibilities by providing them with the level of support needed to manage their health and safety, HR and environmental issues.

Their hands-on approach is highly valued by clients requiring assistance with major issues as they arise.

THSP work with clients to assess training needs and deliver a wide range of courses including e-learning and a wide range of accredited training.

Quality is paramount to THSP. Accreditations include ISOs 9001 and 14001, OHSAS 18001 and Investors in People.

### [www.thsp.co.uk](http://www.thsp.co.uk)

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## About Preact

Preact is an independent Customer Relationship Management consultancy working with all types of business in the private sector as well as charities and educational organisations.

As multiple award-winning CRM architects, Preact have been helping all types and sizes of businesses achieve success from their CRM strategy since 1993.

By taking a product agnostic approach to pre-sales we help organisations develop a CRM solution that will meet their immediate requirements and support continued business growth.

All of our project team hold the highest accreditations. These include Microsoft CRM Implementation, Customisation and Developer Certifications, Microsoft Surestep Project Management and Prince2 accreditations, Scribe Certification and awards for customer service and sales achievement, ensuring that each requirement is expertly managed at every stage.

Preact provide assistance across all Microsoft Dynamics CRM implementation phases including scoping, database development, CRM integration, user training and technical support.

### [www.preact.co.uk](http://www.preact.co.uk)

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