



## Overview

**Industry**  
Charity

### Business Situation

Age UK Islington sought more flexible CRM system that would help it better serve its local community and meet the requirements of its stakeholders.

### Solution

Microsoft Dynamics 365 with Managed Service.

### Main Benefits

- Paperless processing across service operations.
- Reduce time and cost to onboard volunteers
- Data driven insights to optimise its community services
- Increased participation in community projects
- More responsive service provided to clients

*“Dynamics makes it possible for people who aren’t technical experts to make changes. We have a nice balance between what we can do internally and what activities we involve Preact with. Our responsiveness to implement change has been a success story and much of this is down to Dynamics 365.”*

Andy Murphy, Chief Executive, Age UK Islington

Age UK Islington is a charity providing support to people in the London Borough of Islington, enabling them to use self-help approaches to manage their health and wellbeing.

With a focus on prevention, the organisation seeks to identify and facilitate the provision of the right support at an early stage, and if appropriate connect people with other services in the borough. This helps reduce the reliance on public funded services through GPs, A&E and Social Services.

### The Requirement

Age UK Islington contacted Preact in 2015 to discuss replacing its existing CRM system as its Chief Executive, Andy Murphy explains.

“This application did a lot of what we wanted but it offered very limited scope for customisation. We were also lacking insights from our data about which services we provided for each client. Overall, it wasn’t effectively matching how we operate as a business. We needed greater control over the system we use to effectively adapt to the changing requirements of our stakeholders.”

### The Solution

The organisation quickly identified Microsoft Dynamics 365 would be a more scalable solution.

“We were attracted by Microsoft Dynamics as a platform-based system which had the functionality we needed built in”, says Andy. “This would give us greater flexibility and connect with our other Microsoft services and applications. Crucially, we saw how Dynamics could be customised to fit our processes and pathways across the clients we work with.”



*"Microsoft Dynamics has been crucial in helping us standardise our work, while enabling us to personalise our responses to individual situations and client needs."*

Andy Murphy  
Chief Executive  
Age UK Islington

## The Outcomes

**Age UK Islington's service activity is now entirely managed through Dynamics 365.** This includes basic enquiries through to complex case work which may be completed over several months.

"We now have virtually paperless processes across our service operations which makes it much easier to escalate work with teams and individuals", confirmed Andy. "Microsoft Dynamics has been crucial in helping us standardise our work, while enabling us to personalise our responses to individual situations and client needs.

As we now track all essential detail about our clients in one place, we can get straight to the point. There isn't a need for clients to repeat the same information when they get in touch. That has created a better experience as people are assured of a more responsive service."

In addition to its full-time staff, Age UK Islington is supported by a team of more than 60 volunteers. **Andy says the organisation's use of Dynamics 365 has helped it reduce the time and cost of onboarding new volunteers.**

"It isn't feasible for us to spend several months getting each volunteer up to speed through complicated training. In Dynamics we've built in guidance and compliance checks across our processes. As well as providing the control and consistency we need, this directly benefits our community by extending the reach of services through our network of volunteers."

**Knowledge base capabilities in Dynamics 365 are another example of how Age UK Islington is reducing training loads for its volunteers.**

"We are contacted across a huge range of issues, so we are creating knowledge posts that cover frequent types of service requests.", explains Andy. "These 'how to' guides help our people respond quickly, but do so in a standard and consistent way."

**Andy believes the implementation of Dynamics 365 has had a transformative effect on the organisation's reporting.**

"Through our management reporting and internal analytics, we are better able to demonstrate how we use the charity's resources and funding in an optimum way. Including Power BI, we can easily monitor performance across our contracts and drill down into individual cases.

Our data is now providing us with a source of exploratory analytics to discover trends for what people in the community are looking for, and what problems are occurring. This gives us useful insights we can share to improve local services and it is a valuable layer of data exploration generated by the work we do and capture in Dynamics 365."



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Andy Murphy  
Chief Executive  
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## For more information

To find out more about Preact and Microsoft Dynamics 365 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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**To plan ongoing system changes, Andy and his management team meet regularly with Age UK Islington’s newly created team of specialist case workers.**

“Our specialists are frontline workers with experience that includes primary care and social care. Some work in embedded roles in multi-agency teams. Part of their role is to identify areas for integration and improvement which is reflected in the tools we use. Their perspective and knowledge are crucial in helping us adapt Dynamics 365 and drive enhancements that are in tune with what’s needed.”

**To apply these customisations and build new processes, Andy says Microsoft Dynamics 365 has proved to be intuitive.**

“Dynamics makes it possible for people who aren’t technical experts to make changes. As a result, we’ve been able to do a lot of this work ourselves. We have a nice balance between what we can do internally and what activities we involve Preact with. Our responsiveness to implement change has been a success story and much of this is down to Dynamics 365.”

**By unifying its data, and being able to quickly adapt its system, Age UK Islington has been able to step up its involvement in community development projects.** Andy highlights one example of how this has created new opportunities to secure additional development funding.

“In one instance we piloted the provision of Personal Health Budgets with Islington Clinical Commissioning Group. This involved collecting additional data to develop profiles of the people using the service. By adjusting our data capture and developing a separate entity in Dynamics 365 we were able to provide highly detailed feedback through to the programme steering committees. This is another example of how we are improving our service within the community, but I don’t believe it would have been possible to complete the work at this level without Dynamics.”

**In addition to managing its case work, the organisation also uses Dynamics 365 to track its client wellbeing plans.**

“These are long term plans we create with clients”, says Andy. “It reflects a trend in the healthcare system towards proactive action to avoid breakdowns in health. In considering their general wellbeing, each plan will highlight individual goals and aspirations, and identify barriers or problems.

This provides everyone with a point of reference, and it gives us useful context to review progress and respond to subsequent requests. We track each wellbeing plan and engagement in Dynamics 365. This includes individual actions for clients and details of what services they may need from us. Subject to consent, we are able to share these plans with GPs and keep them updated about how we are supporting their patients.”



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Andy Murphy  
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**Recently, Age UK Islington has deployed Dynamics 365 Marketing and Andy reports their early experiences have been positive.**

“We’ve found this effective to keep in touch by sending newsletters to our clients. The next step will be to expand our coverage to include practitioners. There is often high turnover in these roles so it is important we provide frequent reminders about what services we can provide.”

**Summing up, Andy highlights the support received from its Dynamics 365 partner.**

“Our arrangement with Preact has worked very well. Aside from using their helpdesk to troubleshoot any issues, we’ve used managed service hours as part of our forward planning. This has included helping us to prepare for the bigger Dynamics 365 updates.

We’ve gotten to know many of the Preact support team, and those helping us on the larger projects. I’ve always found them to be very approachable and it’s meant we have an easy type of relationship. This makes a big difference and certainly not all support companies are like this!

Their response times are good, and I find it refreshing that if they aren’t sure about something, they’ll be honest and up front to say so. This gives me a lot of confidence to know that I’m not going to be wasting time.

Looking ahead we are keen to test Dynamics 365 live chat and explore the platform’s artificial intelligence capabilities that should help us extract further insights from our data.”

We are very grateful to Andy for his time in sharing his experiences with us. To learn more about the great work delivered by the team at Age UK Islington, visit: <https://www.ageuk.org.uk/islington/>