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Patrick Bonner, Head of British Gymnastics Foundation

Overview

Industry
Charity

Business Situation

British Gymnastics Foundation sought a new solution that would help it simplify its processes and offer self-service web portal capabilities.

Solution

Microsoft Dynamics 365 Sales with Managed Service.

Main Benefits

- More efficient handling of processes consuming fewer resources.
- Quicker completion of grant applications using online Dynamics 365 portal
- Better reporting and timely insights through connected data
- Incremental improvements made through managed service subscription

Based at the National Sports Centre in Lilleshall, Shropshire, British Gymnastics Foundation (BGF) is a charity set up by British Gymnastics to provide a range of programmes that promote wellbeing through gymnastics and related exercises in the community. This includes Love to Move, a dementia-friendly seated gymnastics programme.

The charity also provides grants to gymnasts in need of financial support, and it carries out a range of fundraising activities through events, sponsorship and donations.

BGF was using Sage CRM to handle its core activities but sought a more scalable solution that would work with its existing applications as Patrick Bonner, Head of British Gymnastics Foundation explains.

“Due to limited support we had to move on from Sage CRM. We were looking for the safety of the cloud and out-of-the-box integration with the Microsoft products that we widely use including Outlook and SharePoint. Demonstrating GDPR compliance was another critical requirement for us.

Microsoft Dynamics 365 was an obvious fit and it also offered the added attraction of a connected web portal that could reduce our reliance on paper-based forms.”

BGF implemented Dynamics 365 and deployed a self-service portal that is used by its customers and other external users.

“Thousands of our Love to Move programme sessions have been delivered by approved third parties within care homes.” says Patrick. “The registration and licensing journey can be complex, but we believed Dynamics 365 portals could simplify this. With Preact’s help, our portal has been successfully rolled out and has quickly transformed the handling of these processes.”



“By moving the handling of grant applications to our [Dynamics 365] portal we expect to save up to four days resourcing of a highly skilled person each quarter.”

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Head of British Gymnastics
Foundation

“We receive registrations from local authority employees, physicians and care providers to join the programme. As we are working with vulnerable elderly people it is crucial that our registration process is consistently followed to ensure quality is not compromised. This includes training each person who will deliver the programme and making sure they are fully insured. To meet our criteria, steps include completing an application and uploading supporting documentation. Once this is complete and training has been undertaken, applicants are able to purchase a delivery licence.

Each step is tracked in Dynamics 365 which has been adapted to reflect our rules and checks for the programme. As this data is submitted and shared through our portal, everyone has found it easier to navigate the application process. This is also helping reduce the traffic of phone calls as many questions can be answered online.

With each Love to Move engagement tracked in Dynamics it means we are better able to understand the most profitable accounts and how many people they are supporting. Previously, it would take days or weeks to crunch the numbers. Now this is readily available. These insights are especially valuable when we are negotiating with prospective new contractors by providing a benchmark comparison.”

British Gymnastics Foundation’s portal also handles applications for its Hardship Grant resulting in further productivity gains as Patrick highlights.

“Our grant is available to British Gymnastics members who are at risk of dropping out of the sport due to financial hardship. From more than 200 people who have received funding, 98% of those who were likely to leave, remained involved 12 months later. We are very proud of these outcomes, but we had to acknowledge that our application process involved too much administration; this included applicants mailing us their documentation and frequently incurring extra costs for special delivery. Through our Dynamics 365 portal, all applications are now submitted online, and these can be completed in just 15 minutes.

BGF has grown from just a couple of people, but we are still a small charity that is continually looking to increase our scale. Previously, we didn’t provide an acknowledgement of these grant applications. As the process is now handled within the portal, applicants can see where they are at. For example, they can instantly see if their endorser has provided information to support the application. This is supported by automated workflows in Dynamics that are triggered if steps are not completed. For example, this will send a reminder message to their coach, or another named endorser, if they haven’t yet supplied the requested detail.

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Further administration savings have been made by broadening use of the portal to include BGF’s volunteers. With volunteer data unified in Dynamics 365, a history of each interaction can be instantly checked by all parties which has replaced a legacy spreadsheet.



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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

Reflecting on British Gymnastics Foundation's implementation of Dynamics 365, Patrick praises its partner.

"We don't have an internal IT team which presented some challenges for us to test the user journey but Preact were great throughout this process and they've remained quick in responding to our requirements. Their team has demonstrated a good grasp of our processes and priorities without us needing to spend time providing lots of written detail. This has resulted in work being completed at a good pace.

We continue to work with Preact through their managed service which very clearly lays out what hours are available to us through their own customer portal. I know that I can always pick up the phone when there is a business-critical issue and in my dealings with their consultants I appreciate their critical evaluation of our requirements. By understanding our system and knowing the product, they'll quickly provide an impact assessment by flagging the pros and cons of the changes we've requested.

I have found Preact to be large enough to cater for our requirements but small enough to care. They seem to have low staff turnover which means we often speak to the same people who understand what we need and why. This is a marked difference in approach compared to many IT providers I've experienced, which tends to be at the opposite end of the spectrum!

Our vision for this project was to connect with our customers in a way that makes them feel valued and understood, with a personalised touch. This is being realised through Dynamics 365, but we have ambitious plans to do more which includes connecting our web forms and bringing in our fundraising activities."

We thank Patrick for sharing his experiences with us. To learn more about British Gymnastics Foundation and their great work, visit: www.britishgymnasticsfoundation.org