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Gordon Pearson, System Manager

Overview

Industry
UK Charity

Business Situation
Mencap sought a new relationship management solution to connect their team and improve communication throughout the organisation.

Solution
Microsoft Dynamics CRM deployed to more than 250 users.

Main CRM Benefits

- Secured increased local authority contracts through more efficient management of these processes.
- Improved service delivery.
- Greater transparency and communication between teams
- Increased reporting compliancy.

Background

The Royal Mencap Society is a leading UK charity working with people with a learning disability, their families and carers. Mencap works collaboratively, fighting for equal rights, campaigning for greater opportunities and challenging prejudice.

Mencap provides help through supported living and employment, organised activities, individual advocacy and outreach assistance.

Founded in 1946, Mencap is a membership organisation with a local network of more than 500 affiliated groups.

The Situation

The organisation works with local authorities to deliver contracts which include employment advocacy, supported living, day care services and consultancy services.

Its commercial team are responsible for securing and managing these contracts but as System Manager, Gordon Pearson explains prior to implementing a CRM solution they were struggling to manage these processes efficiently:

"Our commercial team are remotely distributed but they didn't have a single source of shared information so they were relying on spreadsheets and paper based systems to handle most of this work. As a result, critical information about our contracts was often hard to find because it was stored in various places. In short we didn't have the tools we needed."



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***Gordon Pearson
Systems Manager
Mencap***

The Solution & Results

Having previously seen the benefits of CRM, Gordon led a project to deploy Microsoft Dynamics to the Mencap commercial team:

“We found it very easy to get up and running with Dynamics CRM. Its reporting capabilities quickly made our team more informed, especially through dashboards which give us the information we need at the touch of button.”

“An example of this is how Dynamics is helping us comply with our contractual reporting obligations to local authorities. Previously it proved very time consuming to collate all the data we needed whereas now we can easily run these reports on-demand from CRM.”

Microsoft Dynamics has also enabled Mencap to improve its productivity as Gordon continues:

“By using Dynamics CRM we’ve been able to rid ourselves of numerous manual processes that involved a great deal of duplication. We’ve automated a sizeable number of routine activities which has eliminated that duplication of effort and it’s made a big improvement to the accuracy of our data throughout the organisation.”

This is evident in how Mencap has improved its contract renewal processes with local authorities.

“Previously this was somewhat haphazard as we didn’t always receive any warning when these contracts were due to expire. Also, with multiple data sources we’d often find several versions of the same document with varying expiry dates shown.”

“Now we’ve implemented Dynamics CRM and integrated Sharepoint it’s a totally different process. A single version of each agreement is easily accessible from one shared location. Through the automated Dynamics CRM workflows that we’ve configured our contract renewals is now an orderly process.”

From an initially small scale deployment Mencap has now extended Microsoft Dynamics CRM to more than 250 users across 9 teams including its marketing, business development, legal and finance departments.

CRM is also helping Mencap’s servicing team respond to requests from people with learning disabilities, their carer’s, family members and other contacts:

“We now have a clear visibility of all service issues because these are logged centrally in Microsoft Dynamics”, explains Gordon. “That’s helping us to deliver a better service and it avoids problems where service requests might get missed because a reported issue wasn’t tracked.”





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Having easy access to complete relationship and process detail has been a major benefit as Gordon confirms, “CRM is now the single source of truth in Mencap. For our account management it brings together all the information we need in a single interface. If we look at one of our local authority records we can easily see which services we are delivering and view a complete communications timeline.

There’s no doubt that Microsoft Dynamics has brought our teams closer together and improved the communication between them. Initially there were some departmental concerns about sharing information but the security profiles in Microsoft Dynamics CRM have worked perfectly in enabling us to control user access.”

When it comes to assessing the impact of CRM, Gordon singles out one improvement in particular, “Microsoft Dynamics has helped us develop a more open culture at Mencap with far greater transparency. We’re now more proactive in our relationships with local authorities and as a result we’re winning and retaining more contracts, and ultimately we’re supporting more people.”

Mencap has been working with their partner Preact to develop and support their CRM system.

“We’d recently implemented Microsoft Dynamics but we needed a CRM expert to help us take the next step”, explains Gordon. “Preact have delivered a faultless service for many years. I’ve found them to be a great team to work with and I believe that sentiment would be echoed throughout our organisation.”

“Continuity has been a key factor in the success of this relationship especially in terms of our account manager and CRM consultant. We regularly meet with Preact to plan the next steps of our CRM development and review our progress. This has proved a great approach for us as Preact always bring other considerations to the table and they have a clear understanding of our processes. I’d even go so far as to say that I don’t believe there is anyone outside of Mencap who knows our processes as well as your lead consultant!”

“It’s proved to be a very open and honest relationship and together I feel we’ve achieved a lot in our CRM journey. It’s no exaggeration to say that when I am considering providers for other IT services Preact are always my benchmark for comparison.”

Gordon is excited by the prospect of the utilising the recent investments that Microsoft has made in Dynamics CRM and its integrated technologies, “We’re already planning our next CRM upgrade and Power BI is one solution in particular that I’m looking forward to connecting with CRM to understand how it can make further improvements to our reporting.”

“Our Welsh and Northern Ireland operations have already seen the impact that Microsoft Dynamics CRM has made in England so they’re eager to deploy it too which means we’ll have even more teams joining soon.”





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

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About Mencap

Mencap is the leading UK charity for people with a learning disability, and their families and carers. At Mencap, we provide services, advice and support to meet people's needs and choices throughout their lives. We fight for equal rights, campaign for greater opportunities and challenge prejudices.

Many people don't understand what a learning disability is. A learning disability affects someone's intellectual and social development throughout their life. The fact is that people with a learning disability are among the most excluded in our society. At Mencap we are driven by our vision of a world where people with a learning disability are valued equally, listened to and included.

Each week 200 children born in the UK will have a learning disability. Mencap supports over 100,000 people every year in areas such as education, leisure, employment, housing and personal support.

www.mencap.org.uk

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About Preact

Preact is a specialist Customer Relationship Management consultancy and services provider working with market leading solutions including Microsoft Dynamics CRM.

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

At the heart of Preact's culture sit our core values, Putting Customers First, Being the Best and Building Business Together. We are committed to helping organisations achieve outstanding from their CRM solution whilst giving excellent value for money.

All of our project team hold the highest Microsoft CRM and industry accreditations, ensuring that each requirement is expertly managed at every stage through our proven project methodology.

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