



**Mencap is working to improve the lives of people with learning disabilities. With a network of over 300 local groups, Mencap supports people, their families, and carers across England, Cymru and Northern Ireland. Its vision is a world where people with learning disabilities are valued equally, listened to, and included.**

## Highlights

- Increased efficiency by transitioning from spreadsheets to Microsoft Dynamics 365.
- Streamlined supplier onboarding and renewal processes.
- Simplified form captures to improve support for beneficiaries and remove duplication of effort.
- Reduced IT overhead and achieved more robust application performance upon migrating CRM to the cloud.
- Real-time insights supporting decision-making.

Mencap turned to Microsoft Dynamics 365 to streamline processes across its teams by transitioning from spreadsheets.

“With Dynamics 365, we’ve removed numerous manual processes by automating workflows that have eliminated duplication of effort and transformed the accuracy of our data.”, says Gordon Pearson, IT Business Relationship Manager at Mencap.

Mencap onboards around 50 suppliers each year, but this was a disjointed process because data wasn’t captured consistently.

“Our team used spreadsheets to manage the onboarding process, but data was entered to varying standards. In some cases, problems could result when a supplier renewal wasn’t picked up because expiry dates were entered in different formats. Dynamics opened everyone’s eyes to a better way of working, enabling us to implement a rigorous onboarding workflow that is scalable to fit any type and size of supplier requirement.”, says Gordon.

Further improvements have been made to Mencap’s contract renewal processes with local authorities.

“Previously, this was haphazard because we didn’t always receive notifications when contracts were due to expire”, explains Gordon. “Using Dynamics 365, this is now consistently managed as timely renewal notifications are triggered depending on the type of contract.”



*"Our teams have seen how easy it is to configure Dynamics 365, especially using guided processes which can be mapped to any of our repeatable workflows."*

Gordon Pearson  
IT Business Relationship Manager  
Mencap

Mencap has fully migrated its Dynamics systems to the cloud, resulting in additional benefits.

"We completed our move to the cloud during the pandemic, and with Preact's (now part of ANS Group) support, this was completed on schedule. With Dynamics 365 Online, we've seen better stability in our integrations and application performance. It's reduced our IT burden by removing our servers as a potential point of failure. I have better peace of mind because there isn't the same fear that a local server could fail, which would prevent people from accessing their system. It's also allowed us to reduce our time spent on maintenance checks because much of this work is done in the cloud by Microsoft.", explains Gordon.

Being on the Microsoft cloud platform has allowed Mencap to make wider improvements in how it captures and processes data with Dynamics 365, Power Automate and Microsoft Forms.

"We have a network of over 140 volunteers who engage with isolated people, and when they call in for a chat, each volunteer will share details of their visit. We've simplified this process, so our volunteers can quickly tap their visit detail into a form, even if they are offline. We then have a workflow that populates this information in Dynamics, which gives us early visibility so that follow-up work can quickly progress. Previously, these forms were paper-based, so our administrators would manually enter the visit detail in CRM. Time saved per form is about 1-2 minutes, but there is also time and cost savings not having to print and send out pre-paid envelopes for the paper update forms. We receive between 100-130 update forms per month", continues Gordon.

"It's just one example of how we can be more efficient and go faster to improve the service to our beneficiaries.

"We've embraced Forms throughout the organisation. It's proved very effective in allowing non-technical users to share data quickly without requiring them to access our CRM directly. If we need a more advanced form to include live data, we know we can easily build these using Power Apps."

Gordon also says that upgrading their software and moving to the cloud won over more teams who are now seeing the value of Dynamics, sometimes after considering going a different way.





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"Our teams have seen how easy it is to configure Dynamics 365, especially using guided processes which can be mapped to any of our repeatable workflows. Some teams previously used long CRM forms, which involved much scrolling in finding or updating information, but the newer tabular design is intuitive for our end-users, and it's driving better behaviour.

"Our teams are also gaining better insights from our data to identify where action may be needed. Finance is a good example of this as they now have access to a suite of data quality dashboards where they can see if they have any records missing data, or requiring other attention".

"Our area and regional operations managers have a further set of Dynamics 365 dashboards that are driven using the 'my' record view, so at management team meetings, they can instantly access all the information they need, including a financial breakdown for their relevant areas."

Mencap has worked with Preact since 2011 to support its evolution of Microsoft Dynamics.

"We've always had great support from Preact, and I believe the longevity of our relationship has enabled us to deliver so many of the improvements we made.", says Gordon. "We know each other very well as organisations, and it's proved to be a very honest and open relationship.

"Mencap uses a continuous improvement method to develop its Dynamics 365 systems. Since the pandemic, we've encouraged our teams to use Azure DevOps to highlight challenges and make new requests. We're now moving to a software development model to ensure our product owners are at the forefront of these discussions."

More than a dozen Mencap teams use Dynamics 365, storing information in multiple databases. As part of its strategic plan, Gordon says Mencap is looking to unify these instances within a single platform.

"It's a hugely exciting project, as it will give us a clear and complete picture of each person across our touch points. This includes people with a learning disability, their parents and carers, campaigners, doctors, fundraisers, and many other relationships. By enabling us to connect the dots, a centralised Dynamics 365 database will allow us to see the multifaceted connections between our contacts, where for example, a carer could also be a volunteer. Joining this data as a single source of truth will allow us to create accurate personas and improve our communications."

## How can we help your organisation?

Contact us to understand how your organisation can advance its digital transformation with Dynamics 365.