



Overview

Industry

Charity

Business Situation

Independent Lives sought a new partner to upgrade its legacy on-premise Dynamics CRM database and migrate this to the cloud.

Highlights

- Better, all-inclusive support to help with current usage and future development
- Improved end-user experience as a result of updated capabilities, better reliability and user training
- Flexible and accommodating approach to the Dynamics 365 Online implementation project
- Establishing a strong relationship between both parties, as well as other external partners

Independent Lives is a user-led charity that provides a range of care and support services across West Sussex and Croydon for disabled people of all ages, and parents and carers of disabled children. Its core work includes supporting people who receive Direct Payments to help arrange and manage their own personalised care and support, enabling them to lead full, active and independent lives.

As part of its IT modernisation strategy, Independent Lives engaged Preact to upgrade its longstanding Microsoft Dynamics CRM database and migrate this to Dynamics 365 Online.

We talked to Michael Barford (Director of Business Planning & Finance) about this process and the early benefits that Independent Lives has gained since moving its CRM database to the cloud, and how Preact has supported their team.

How does Independent Lives use Microsoft Dynamics?

Across our organisation, we track our interactions with the people we support. This includes sensitive detail so it's crucial that we have an effective CRM system to accurately record, maintain and protect this information. We also rely on Dynamics to support us in fulfilling our services and generating reports for our funders, including local authority social care teams.

Dynamics 365 brings everything together in one place. This includes our conversations and the services that we provide to an individual which helps us to continue providing advice and support.



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Michael Barford

Director of Business Planning & Finance

Independent Lives

What improvements did you want to make?

When I joined Independent Lives, the organisation was using Dynamics CRM 2013. Due to the age of this software, we were constrained by its lack of support and development. This was proving incompatible with the changes we were making to develop and improve our services. In particular, the reporting capabilities didn't work effectively for us which required a lot of manual effort on our part.

We wanted to make a step change with additional functionality and better reliability in the latest cloud version to integrate Office applications, as we deploy Microsoft 365. It's early days, but the sentiment across our team is overwhelmingly more positive towards Dynamics since we upgraded. I believe everyone is seeing a better user experience and benefiting from the updated capabilities that we expected.

Why did Independent Lives choose Preact?

I previously knew of Preact as a support provider, and I saw the company as a potentially good partner for us. Our external IT provider also recommended their services which prompted me to get in touch again. As part of my research, I contacted several companies, but I concluded that Preact was the best fit in terms of its price as well as its support coverage, which also included access to eLearning.

How was your cloud migration handled?

I was very happy with the process that Preact followed and the outcomes we've achieved. At every step this flowed well; from the initial proposal and collecting information, to setting up and running the project. It was clear that a good relationship exists between Preact's teams. From start to finish, I believe our project was managed effectively. Everyone we were in contact with was very responsive and the communication was impressive.

I'd also highlight the flexibility that we saw from Preact during this process. We wanted to coordinate the work with our rollout of Microsoft 365 which forced us into some delays due to scale of this broader project. We were grateful that Preact was able to adapt to our changing timelines in completing their technical work and delivering training.

The age of our legacy Dynamics software created some extra complexity, but it was pleasing that it ultimately proved to be a smooth transition to the cloud.

I've received positive feedback from my team about the content and thoroughness of Preact's training which is helping us get up to speed with the new version. We are still asking questions as we learn more about the new version, so it's great that we have Preact's managed service to provide continued support.





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Michael Barford

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What do you like about Preact's approach?

My experience has been very positive in how we do business together and how Preact has effectively completed our project. I've nothing but good things to say about the people we've worked with. Their focus on establishing strong relationships with our team and our external IT provider has been great. Their processes are customer-oriented, and I've found their communications to be very open and transparent.

What are your plans for Dynamics 365?

We are taking a fresh view of our reporting using Dynamics 365. It is evident that the new system is more flexible which has the potential to save us greater time and cost. We may develop this internally or use Preact's services to develop a series of new reports.

We are looking to integrate Dynamics more closely with Microsoft 365 and we will continue using Preact's managed service to improve our knowledge of the application and increase its effectiveness.

We are grateful to Michael for sharing his experiences.

Visit www.independentlives.org to learn more about how Independent Lives is working to change the lives of disabled people, people with support needs and carers.

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

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