



Customised CRM system helps track client services and report results to multiple funders.

“It’s all about our clients. Greater visibility of our interactions with each client enables us to help them improve their lives.”

Nic Templeman, Development Manager, Relationships Australia (WA)

Relationships Australia is a federated independent, A\$100 million not-for-profit organisation that aims to assist people to build better lives. Previously, Relationships Australia (WA) used a specialist counselling system to schedule sessions and report back to government. However it could not be modified easily, restricting staff to a specific reporting template, and preventing the organisation from evolving a transparent, state-wide scheduling tool.

In 2010, Relationships Australia (WA) used Microsoft Dynamics CRM to create a highly customised client-management and reporting system. Now, web services integration enables financial data captured in Microsoft Dynamics to be exported directly to the organisation’s accounting system, while document tagging and Microsoft SharePoint integration helps staff maintain comprehensive client-centric records.

Relationships Australia (WA) has the capability to be more responsive to client requests for help and keeps better track of all case information. Because the CRM system also tracks individual costs, managers can compare service delivery costs at different branches across the state. Most important, Relationships Australia (WA) has a case-management system that staff can adapt to the needs of each funding body, so they can show how every dollar is spent.

Relationships Australia WA

Industry: Not-for-profit

Location: Western Australia

Number of employees: 280

Organisation Profile

Relationships Australia (WA) is a not-for-profit community service organisation which provides a diverse range of innovative counselling, mediation, community education and professional development services throughout Western Australia.

Business Situation

Relationships Australia (WA) was using a case management system specifically designed to produce reports for the Federal Government. As its services expanded, the organisation wanted the ability to capture more information and produce more detailed reports for multiple funders.

Solution

A joint team from Relationships Australia (WA) and Microsoft Gold Certified Partner for Customer Relationship Management, CSG, deployed a highly customised version of Microsoft Dynamics CRM. Web services integration delivers service and financial data to funders and the Relationships Australia (WA) accounting system.

Benefits

- Improved resource management
- Better data capture
- Enhanced reporting capacity
- Improved monitoring of funding
- Flexible platform for future development



“Strategically, we were trying to separate our standard data from data we are required to collect for individual funders.”

*Nic Templeman,
Development Manager,
Relationships Australia (WA)*

Business Needs

Relationships Australia was founded over 60 years ago, with the aim of providing support and advice to people experiencing difficulties in their marriages, during the social upheaval of the post-war period.

Today it provides a broad range of relationship programs and services to approximately 140,000 people throughout Australia, from a variety of cultures and backgrounds.

Largely funded by federal and state governments, Relationships Australia has an annual income of over A\$100 million and employs 2,000 staff.

Relationships Australia (WA) employs 280 practitioners and staff, and provides relationship services from 30 locations across the state. These include counselling services on a range of issues, mediation and family dispute resolution, relationship education and family/domestic violence programs. It also assists in the development of specific communities, including Aboriginal and Torres Strait Islanders and humanitarian entrants recently settled in Australia.

“It’s all about our clients,” says Nic Templeman, Development Manager, Relationships Australia (WA). “We wanted the ability for staff to see records of all interactions between the organisation and its clients, while improving the security of sensitive data. Greater visibility of our interactions with each client enables us to help them improve their lives.”

Relationships Australia (WA) must submit regular detailed reports to its multiple funders. It was using a case-management system specifically designed to fulfil the Federal Government’s Department of Families, Housing, Community Services and Indigenous Affairs reporting requirements. However, by mid-2009, managers wanted greater flexibility in managing and

reporting on multiple contracts from a range of funders.

“Strategically, we were trying to separate our standard data from data we are required to collect for individual funders,” says Templeman. “We wanted to record additional data, on top of what our funders required, and we also wanted to develop our concept of ‘contract’: the ability to attribute clients, cases, sessions and programs to specific grants.”

The organisation also required more transparent scheduling. Previously many offices used an appointments book to schedule sessions with clients. This was sometimes unavailable to staff who answered phone calls, and staff in one office were unable to quickly arrange appointments in other locations. As a result, if a client called a centre, Relationships Australia (WA) could not always give them the earliest appointment.

Lastly, Relationships Australia (WA) sought to improve efficiency and case management. Staff wanted financial data to flow automatically between its client management system and its accounting system without the need for additional manual inputs.

“We also wanted the system to integrate with SharePoint so we could improve document management,” says Templeman. “And we wanted to store session notes with customer data and make this case data available to practitioners in a web-based application.”

Solution

In August 2009, Relationships Australia organisations in Western Australia, South Australia and New South Wales issued a public tender for a new case-management and reporting system.

“We compared existing counselling case-management systems with standard enterprise solutions that

“Microsoft Dynamics CRM has an interface that is very easy to customise. We would be able to create custom data entry forms and views to meet the needs of multiple users.”

Karen Lewis, Application Support Officer, Relationships Australia (WA)

we could adapt to our own requirements,” says Templeman.

Microsoft Gold Certified Partner for Customer Relationship Management, CSG, had experience working with the not-for-profit sector. They believed by applying the xRM (Anything Relationship Management) concept to Microsoft Dynamics CRM business management software, they could fashion a powerful case-management tool with all the interfaces Relationships Australia (WA) required.

“Microsoft Dynamics CRM has a good interface, which makes it incredibly easy to use,” says Jason Ferguson, CRM Practice Manager, CSG. “This would be critical to a successful rollout across 30 locations. However, it is also highly extensible which means we could do the sort of customisations that Relationships Australia (WA) wanted. And it would give them the flexibility to develop new functionality in-house.”

“Microsoft Dynamics CRM has an interface that is very easy to customise,” says Karen Lewis, Application Support Officer, Relationships Australia (WA). “We would be able to create custom data entry forms and views to meet the needs of multiple users.”

Ease of use and familiarity of the Microsoft interface were also significant factors in selection of the system.

“We already used Outlook, so it would be easy to migrate to the new system because the interface was really familiar,” says Sharyn Norman, Customer Service Officer, Relationships Australia (WA).

With specific integration requirements, Relationships Australia (WA) selected the Microsoft application. CSG placed a consultant onsite from January 2010, who executed a series of complex customisations.

The consultant used an open source Web service bus called NServiceBus to enable Microsoft Dynamics CRM to export financial data straight to the finance system, TechnologyOne. He also created a Web interface that transmits reporting data straight to its principal funder.

CSG consultants also customised the Microsoft Dynamics CRM database to create a counselling session scheduling tool. This enabled staff to see the availability and location of all qualified practitioners, and schedule a counselling session on the spot.

Lastly, consultants worked out how to integrate Microsoft SharePoint 2010 documents with the case-management system, so that practitioners working remotely could log on to a SharePoint portal and add notes to cases in the case-management system.

In December 2010, Relationships Australia (WA) rolled out the new case-management system to 80 customer service staff across Western Australia.

Benefits

With its highly customised Microsoft Dynamics CRM case-management system, Relationships Australia (WA) has improved scheduling and expedited reporting. It has also produced a highly adaptable platform that will help deliver more services.

Improved resource management

If a potential client rings up, sounding uncertain or distressed, Relationships Australia (WA) can now make immediate arrangements to assist that person as soon as possible.

“Our scheduling tool means we can take a call in one location while making a booking at another,” says Templeman. “This allows us to manage our resources more efficiently and provide better services to those in need.”

"If the government or a funding body changes reporting requirements at short notice, we can often make the necessary changes to our system within the hour."

Nic Templeman, Development Manager, Relationships Australia (WA)

Better data capture

Since staff at Relationships Australia (WA) create the input fields in the case-management system, they can ensure that staff capture critical new pieces of information.

"For example, now we can track referrals from GPs, including the name of the practice," says Templeman. "Having control over data-entry fields means we gather the information we need and our funders require."

Enhanced reporting capacity

Relationships Australia (WA) can now generate bespoke reports for each separate funding body. Despite needing to create more reports, the process takes less time.

With transactional data being sent directly to the financial system, management staff can produce more useful internal reports. They can identify individual transactions at every office, which helps them track costs and performance.

"It used to take one person a week and a half each month to summarise data so we could submit our reports," says Templeman. "Now that happens automatically."

"We can compare the average cost of a session at Port Hedland with the cost of delivering the same service in Perth," says Templeman. "This is incredibly helpful when we tender to provide new services because we will be able to estimate our costs much more accurately."

Improved monitoring of funding

By enabling office staff to tag each client session to a particular source of funding, the new client information system helps Relationships Australia (WA) demonstrate the value it provides to funders and other stakeholders.

"Now if we have a contract to provide a particular service for clients, we can track exactly how we spend that money," says

Templeman. "Accurate recording of the services we are providing helps us to avoid the danger of over-spend or non-completion."

More important, Relationships Australia (WA) can demonstrate outcomes to funders, because the funding source is linked to individual cases.

Flexible platform for future development

Relationships Australia (WA) believes that its choice of case-management system is vindicated by the potential for customisation. It can now respond to the reporting requirements of multiple funding bodies and adapt to changes as they arise.

"We can make alterations much more rapidly," says Templeman. "If the government or a funding body changes reporting requirements at short notice, we can often make the necessary changes to our system within the hour."

Relationship Australia (WA) will continue to adapt and customise its system, spurred by the potential for integration with other Microsoft applications.

"The end product was extensively customised," says Ferguson. "We are looking forward to what we will be able to do in the next twelve months utilising Microsoft SharePoint in addition to Microsoft Dynamics CRM."

Technical Information

Software and Services

Microsoft Dynamics CRM

Microsoft SharePoint 2010

IT Issues

Improved service scheduling, data capture and more detailed reporting.

Microsoft product that was featured

Microsoft Dynamics CRM is a Customer Relationship Management application that helps manage customers, cases, contracts or projects. It gives the ability to track, monitor, and retrieve detailed information about each entry item, along with related activities and tasks.

Users will find the functionality familiar, and an interface that helps them work in a personal, natural way. With a comprehensive 360-degree view of customers and streamlined processes, Microsoft Dynamics CRM helps manage every aspect of customer relations and complete projects on time and within budget.



Partner Information

CSG

Level 18, 135 King St

Sydney NSW 2000

Email: info@csq.com.au

<http://www.csq.com.au>

For More Information

For more information about Microsoft Dynamics call a Microsoft Dynamics Sales Consultant on 1800 197 960 Monday to Friday 9am to 6pm AEST. To find a partner or solution, visit

<http://dynamics.pinpoint.microsoft.com/en-AU/home>

This case study is for informational purposes only. MICROSOFT MAKES NO WARRANTIES, EXPRESS OR IMPLIED, IN THIS SUMMARY.

Document published December 2011

14919-1211/RAWA

Microsoft