

COMPANY CASE STUDY

# BRIGHTON THERAPY CENTRE



## COMPANY BACKGROUND

Established in 2012, Brighton Therapy Centre (BTC) is a not-for-profit organisation providing counselling and talking therapies for individuals, couples, families, young people and local businesses who are seeking mental health and well-being support.

Previously managing information in spreadsheets, processes were becoming difficult to manage and BTC recognised areas where efficiency could be improved. Pragmatiq implemented a Custom Business Solution, leveraging Microsoft Dynamics 365 and the Power Platform.



### CHALLENGES

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- › Previously managing information manually, across multiple spreadsheets
- › Lack of visibility and access to information for employees to do their jobs effectively and efficiently
- › Managing multiple levels of access for users was challenging
- › Lack of automation increased the chances of important businesses processes getting missed
- › Manual communication between the core team and practitioners created inefficiencies and lost time
- › Time consuming referral process
- › Inconsistent experience around communications with clients, practitioners and other stakeholders



### SOLUTION

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- › Designed and implemented a Custom Business Solution
- › Now able to manage data from one place
- › Implemented functionality that allows the organisation to capture all the necessary information around the referral process
- › Built functionality to support the funding process
- › Secure view of all practitioners, fees, skills, certifications, etc., so BTC can easily match a client to the correct support team
- › Implemented an integration with SharePoint
- › Implemented an integration with Outlook



### BENEFITS

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- › Improved visibility and access to information
- › Enhanced productivity and efficiency
- › Optimise communications
- › Foundation for future improvements

## CHALLENGES



Previously, Brighton Therapy Centre managed clients, referrals, sessions and funding information across a wide range of disparate spreadsheets and data silos which presented challenges when accessing information that is required for day-to-day business operations.

The organisation recognised that continuing to manage the business using Microsoft Excel and Word, rather than a centralised system, will result in many wasted hours through duplication of work and searching for key information.

Another key challenge faced by Brighton Therapy Centre was the lack of visibility and access to information for employees to do their jobs effectively and efficiently. For practitioners, this was particularly difficult as they do not have the same level of access as the core team and struggled to access the data they need. Additionally, lack of functionality meant that users were not prompted or reminded of tasks, increasing the chances of important processes getting missed.

The referral process, a key element of the organisation, has multiple stages with involvement from several stakeholders (council, occupational health, NHS, practitioners, etc.) Due to the lack of visibility and use of multiple systems, tracking this process from an administration perspective was manual and time-consuming.

Once a referral comes in, Brighton Therapy Centre then need to book a room (virtual or physical) for a therapy session to take place, and assign this session to the relevant therapist. This was previously managed by a legacy booking system, however this lacked integration with other systems and was a challenge to maintain.

Finally, communications with clients, practitioners and other stakeholders were ad hoc and manual, creating an inconsistent experience and inefficient processes across the organisation.



## SOLUTION



After gathering Brighton Therapy Centre's requirements, we identified that a Custom Business Solution, leveraging Microsoft Dynamics 365 and the Power Platform, would be the most suitable fit for the organisation.

Within the Custom Solution, BTC can manage business processes, such as the referral of clients, stakeholder details, relevant certifications, etc., in a structured and systemised way. The security capabilities within Microsoft Power Apps also helps to ensure the organisations data is secured appropriately.

To manage the referral process, we implemented functionality that allows the organisation to capture all the necessary information, such as initial assessment, client needs, relevant documentation, onboarding, etc. Once onboarded, practitioners can then also manage sessions, room bookings and invoicing within the system, reducing the manual administration time previously spent on these activities.

To support funding, the system manages the full tracking of forecasting and actual funds spent, ensuring BTC can effectively manage funds in a single system and therefore improve decision-making and simplify operational reporting.

For the management team, having a centralised view of all practitioners and relevant data is essential. The Custom Business Solution provides a secure view of all practitioners, fees, skills, certifications, etc. As a result, management can easily match a client to the correct support team, ensuring they provide the best service possible.

From a practitioner perspective, security permissions can be set to ensure they have access to the system, however, have a restricted view that only allows them to see their referrals and clients assigned to them, maintaining confidentiality. To support practitioners further, notifications can be setup within the system through email and dashboards, helping to reduce admin and keep on top of tasks.

We also implemented an integration with SharePoint, enabling BTC to store all documentation for referrals. The documentation can then be accessed directly from the Custom Business Solution, removing the need for storing files locally and reducing the time spent searching for relevant information.

Additionally, we implemented an integration with Outlook, allowing all communications to be tracked within the system. Standardised email templates were setup in Dynamics 365 to support this process and enhance efficiency, consistency and visibility across the organisation. Additional training sessions were given in this area to ensure users understood how to create email templates and send responses to clients and stakeholders effectively.



## BENEFITS



Through the implementation of our solution, the following benefits were realised:

- **Improved visibility and access to information** – By moving BTC away from spreadsheets and data silos, users can now access all information from one solution with systemised processes also in place. Additionally, the solution can be accessed from anywhere, on any device, supporting users who need to work remotely.
- **Enhanced productivity and efficiency** – As a result of centralising information in one place, users reduce time searching for information and can conduct their daily tasks more efficiently. Additionally, automation capabilities within the solution to set notifications around tasks and other key areas saves time and removes the need for manual processes.
- **Optimise communications** – By utilising standardised email templates in Dynamics 365, communication processes can become more efficient and consistent, and the visibility of communication with stakeholders can be shared as appropriate across the organisation, helping to remove silos and provide single views of the client and practitioner.
- **Foundation for future improvements** – By migrating business processes into Microsoft Power Apps, BTC can benefit from significant immediate improvements to efficiency, usability and security. Longer term, the platform offers a stable foundation to build on in the future, as the organisation scales and requirements change.



“The Brighton Therapy Centre is a social enterprise providing high-quality psychological therapies to local people. Our processes are complex and, given the sensitive nature of our work, it is essential that we can manage our data securely and efficiently. We looked at various options for developing a clinical system that could meet our needs and arrived at Dynamics as the one system that could cover everything from client records and booking appointments to automated surveys and data analysis. We undertook an extensive procurement process to find the right provider. It was clear that Pragmatiq understood our organisation and needs in a way that other providers didn't. We have been working with them now for a few months and have been delighted with their approach and commitment to getting things right. The whole team is professional, engaged, and reliable and I look forward to working with them again on future developments.”

KERRY EVANS – CEO AT BRIGHTON THERAPY CENTRE

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