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COMPANY CASE STUDY

JAMES' PLACE

James' Place
PREVENTING SUICIDE. PROVIDING HOPE.

COMPANY BACKGROUND

James' Place is a suicide prevention charity for men. The organisation works with health partners to deliver a service to men whose needs have not been met by traditional services.

The first James' Place opened in June 2018 in Liverpool, the first of its kind in the UK. The second James' Place centre opened in London in 2022, and three new centres in the UK are set to open over the next three years.

To date, the charity has supported more than 800 men experiencing suicidal crisis and delivered over 2,000 therapy sessions.

CHALLENGES

> Previously operated with disparate system and data silos

> Accessing information was incredibly difficult, manual and time-consuming

> Processes across the organisaton difficult to standarise due to lack of centralised system

> Limited reported capabilities

> No way of gaining a real-time view of key information

> Manual and inefficient process around sending surveys out to clients

SOLUTION

> Designed and implemented a Custom Business Solution built on Dynamics 365 and the Power Platform

> Users can effectively manage all referrals from the start of process

> Embedded Customer Voice Survey on website for referral forms, with information flowing back into Dynamics 365 system

> Dynamics 365 Customer Voice also used to send regular surveys

> Ability to manage all stakeholder records (clients, referrers, GPs, supporters, mentors, etc.)

> Established a Twilio integration

> Provided training around the native reporting functionality with Dynamics 365

BENEFITS

> Improved visibility and access to information

> Stable platform for future growth

> Enhanced efficiency

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CHALLENGES

James' Place previously operated with disparate system and data silos, including HeyDoc clinical management system and separate document storage. This made accessing information that is needed day-to-day incredibly difficult, manual and time-consuming.

As the previous systems were not custom-built for James' Place, all the features that the organisation required were not available and many of the features that were available, were not relevant and hindered the user experience.

Across the organisation various processes are in place to ensure users are working in the same way, however, due to the lack of a centralised solution, this was hard monitor.

James' Place also faced challenges with reporting and had no way of gaining a real-time view of their key information. Reporting capabilities within HeyDoc were limited, which alongside challenges around data residing in different applications, made gaining insights difficult.

Reporting was also a key element to improve for funding purposes. Providing accurate and timely reports could help to support funding applications, which would ultimately help James' Place achieve its aims of growth in new centres throughout the UK.

Finally, James' Place send regular surveys out to clients after they are referred, and also on an on-going basis to check on wellbeing and other areas. Following the receipt of a survey, manual intervention was required from a member of staff, to update the information in HeyDoc. This was a very manual and inefficient process, and a system that could automate and support this process would be beneficial.

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SOLUTION

We designed and implemented a Custom Business Solution built on Dynamics 365 and the Power Platform, with the functionality that James' Place required, however, the solution could be expanded upon as the organisation grows.

The main part of the solution is focused on referrals and enables James' Place to effectively manage all referrals from the very beginning.

Referrals can be made via the James' Place website, by filling out the embedded Customer Voice Survey. Following this, a referral is then created within the system for a member of James' Place to follow-up in a timely manner. If the person can be supported by the organisation, a meeting is arranged and a care plan is determined, all of which is then tracked within the system right through to discharge.

Dynamics 365 Customer Voice is also used to send regular surveys (known as Core 10s) to check on client wellbeing and other areas.
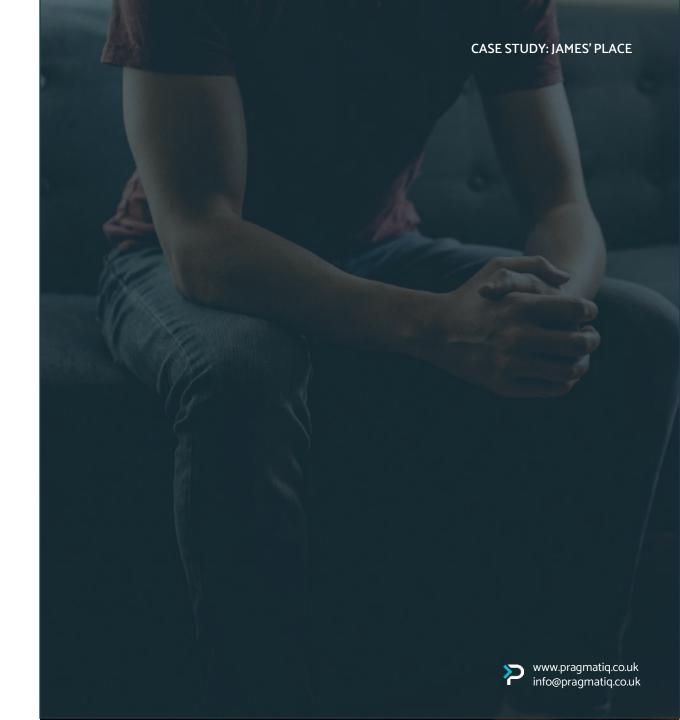
Within the Custom Solution, James' Place can manage all stakeholder records (clients, referrers, GPs, supporters, mentors, etc.) and have links between them. For example, a Client record can have their supporters and mentors linked. This allows quick and easy access to those who are linked, without the need to search through spreadsheets and collate this information manually.

Session notes can also be tracked directly against a Client's Service Plan record, improving the speed to access that information. Additionally, related documents can also be linked to the record, as the seamless integrations between Office 365 and Dynamics 365 are leveraged, increasing efficiency and productivity as a result.

We also established a Twilio integration, enabling James' Place to send texts to their clients and maintain regular contact.

To guide users through the system and ensure standard processes are followed, several steps were put in place that reflect how James' Place worked, ensuring users capture the correct and relevant information. Appropriate terminology is also used throughout, to improve the user experience and aid adoption of the system throughout the organisation.

Finally, to overcome reporting challenges, we provided training around the native reporting functionality with Dynamics 365, including dashboards, charts and views. This allows management to view key information and gain important insights, ensuring people are getting the support they urgently require.

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BENEFITS

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

> **Improved visibility and access to information –** By moving James' Place away from HeyDoc and disparate systems, users can now access all information from one solution with systemised processes also in place. This also improves the user experience, as the system accurately reflects how they work.

> **Stable platform for future growth –** James' Place is a growing charity and the processes which were previously in place may have been restrictive. The current solution provides more stable platform to build on in the future, as the business scales and requirements change.

> Additionally, James' Place have growth plans to open new centres across the UK. To achieve this, access to funding is key and the reporting capabilities within the new system can support funding applications.

> **Enhanced efficiency -** Establishing a robust reporting setup where real-time data is available, allows management to get insights and interrogate data daily. In turn, this will enable James' Place to get more control of their business operations and provide significant efficiency improvements .

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