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COMPANY CASE STUDY

SOLUTIONS SOCIAL CARE

solutions
social care

COMPANY BACKGROUND

Solutions Social Care (SSC) is an established provider of services to children and adults with autism, learning disabilities and complex needs.

They are registered with the Care Quality Commission (CQC) regarding personal care services and also offer a wide range of services delivering bespoke activities involving residential, supported living, day service, outreach and community-based activities.

CHALLENGES

> Challenges with siloed data and disconnected systems

> Previously managing all information manually, across multiple folders and spreadsheets

> Data lacked consistency and automation

> Client referral process was manual and required an individual to gather information and related documentation

> Process for onboarding new workers was time-consuming

> Monitoring training certificates and expiry dates was complex

> Reporting and forecasting was heavily impacted due to the disparate information

SOLUTION

> Designed and implemented a Custom Business Solution, leveraging Microsoft Power Apps

> Now able to manage all accounts and contacts from one place

> New system is tailored to fit around SSC's unique referral process

> Implemented a website integration to capture the referrals that come in via the website

> Implemented functionality to manage the Worker applications

> Implemented prompts and alerts for upcoming expiry dates on training certificates

BENEFITS

> Improved information accuracy and process

> Time saved

> Optimised referral process

> Improved security

> Increased insight for decision-making and forecasting

> Access from mobile devices

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CHALLENGES

Prior to engaging with Pragmatiq, Solutions Social Care (SSC) experienced challenges with siloed data and disconnected systems. They were managing information around clients, stakeholders, and other processes manually, across multiple folders and spreadsheets. Despite leveraging SharePoint, which meant all data was already stored in the cloud, the information lacked consistency and automation, meaning activities took longer than required.

Due to the nature of the business, clients have individual care plans that key members of staff require access to. Keeping track of this information is essential for risk management and compliance, therefore, it is imperative that any solution supports this process. The previous way of working didn't support relationships between information; therefore, data was siloed and care plans, notes, documents, etc, were stored separately.

Client referrals form a significant part of SSC, which come in various formats (email, website, local authorities, etc) and are associated with different agreements. Previously, this process was manual and required an individual within the business to undertake a manual assessment to gather additional information, send and receive documents, plan next steps, initiate follow-ups, etc. One of the key outcomes of the CRM system was to make the end-to-end referral process more efficient. The referral and approval process is unique to SSC, therefore the future system should be tailored around this.

The process for onboarding new workers was also time-consuming, as all data had to be captured and saved manually. Workers often have multiple training certificates associated with them, which have various expiry dates. Keeping a track of these is complex, especially as the organisation grows and more people are onboarded. SSC recognised that automation around this process would be beneficial and ensures compliance measures are maintained.

Lastly, reporting and forecasting was heavily impacted due to the disparate information and gaining basic insights to forward-plan, was a manual, admin-heavy task.

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SOLUTION

After gathering SSC's detailed requirements, it was apparent that their needs did not require standard Dynamics 365 functionality such as Sales, Marketing, Customer Service, etc. Instead, we designed and implemented a Custom Business Solution, leveraging Microsoft Power Apps, including the functionality they required and could be expanded upon as the organisation grows.

Within the Custom Solution, SSC can manage all accounts and contacts (clients, suppliers, local authorities, transport suppliers, etc) from one place. Any data and relevant correspondence can be tracked on the record, such as ongoing notes, what plan a client is on, associated workers, etc.

The new system is also tailored to fit around SSC's unique referral process. A referral can be managed from the start of the process and collecting the client information, through to the end where a referral becomes a client. At this point, the record automatically changes to reflect this and carries over any current information, eliminating the need to manually re-input this data.

Additionally, we implemented a website integration to capture the referrals that come in via the website. Previously, these were reviewed and allocated manually, however, the integration automates this process, reducing response time and improving the experience for clients and staff.

We also implemented functionality to manage the Worker applications. Information around the application process, such as CVs, training, onboarding documents, email and call tracking, registration, and the capturing of any other relevant documents is all stored against a contact. Once the worker is successfully onboarded, the record can then be updated with employment information, DBS checks, associated clients, training certificates, etc.

To ensure training certificates are kept up to date, we implemented prompts and alerts for upcoming expiry dates. Proactive automated reminders in the system ensure these do not go out of date, and are colour coded to signify when the expiry date is approaching; This enables users to see quickly the action that needs taking.

As standard within the new system, users can access information via mobile. Previously, SSC had limited accessibility to information, which restricted how daily processes could be performed. Users can now update service plans, submit reviews, add notes, create new records, manage incidents and more, through mobile devices. This enables the business to gain a real time view of all activity to increase the speed of decision making and accuracy of information.

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BENEFITS

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

> **Improved information accuracy and process efficiency** – Previously, the majority of information was stored in disparate systems and lacked structure. By implementing a Custom Business Solution, SSC now has all data stored in one place with systemised processes in place. This has increased overall visibility, the accuracy of information and made the organisation more efficient.

> **Time saved** – SSC now saves a considerable amount across the business, that was previously spent searching for information, relevant documents, and other resources.

> **Optimised referral process** – This was previously a time-consuming and manual process. The new system provides an optimised, automated process for referrals that not only saves time, but also provides a standard process for users to follow. This makes onboarding quicker and easier, alongside providing a better experience for staff.

> **Improved security** – Solutions Social Care has improved security and system governance by moving to the cloud. Security permissions around sensitive data can easily be set, and backups and continual updates to the platform are delivered to the platform without disruption to service. This allows them to always remain accessible to clients and maintain security across the business.

> **Increased insight for decision-making and forecasting** – As the information is now in one system, management can gather key insights quickly and easily, allowing them to make more informed decisions. Additionally, enriching client records with relevant data provides better forecasting and planning capabilities for Solutions Social Care.

> **Access from mobile devices** – By enabling mobile capabilities, SSC can improve the speed of data capture, manage interactions on-the-go, and make informed decisions using real-time data.

"We commissioned Pragmatiq to deliver a bespoke CRM for our social care and transport business. It was important that any system could be adaptable and allow for the scope of work that we do. We have been very impressed with the new CRM and feel it is fit for purpose and has given us specific functionality, and with possibilities to add to the system. Pragmatiq are organised and professional in their approach and I would not hesitate in recommending them."

BUKO ESEGBONA - DIRECTOR OF CHILDREN & ADULT SERVICES AT SOLUTIONS SOCIAL CARE

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