



Microsoft Dynamics CRM Customer Solution Brief



Ontario Hospital Association dramatically reduces event management costs, improves member communications using Microsoft Dynamics CRM

Customer: Ontario Hospital Association

Web Site: www.oha.com

Customer Size: 100 employees

Country or Region: Ontario

Industry: Health care

Partner: pavliks.com

Organization Profile

Since its inception in 1924, the Ontario Hospital Association (OHA) has influenced and helped shape health care policy in Ontario, leading the way through changes, innovations, challenges, and opportunities. Today, representing 155 public hospitals, OHA assumes a leadership role, focused on patients, promoting an efficient and effective health system.

Software and Services

- Microsoft Dynamics CRM 4.0 Enterprise Edition
- Microsoft SQL Server 2008 Enterprise Edition
- Microsoft Exchange Server 2007 Enterprise Edition
- Microsoft Office SharePoint Server 2007
- Microsoft .NET Framework version 3.5

For more information

In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. To access information using the World Wide Web, go to: <http://www.microsoft.com>

For more information about pavliks.com, call (877) 728-5457 or go to: <http://www.pavliks.com>

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Robert Saggiorato, IT Manager, Ontario Hospital Association

Business Needs

The very roots of Ontario’s health care system can be found in the Ontario Hospital Association (OHA). Established in 1924, OHA helps to improve patient care and foster a results-oriented system by bringing together and supporting 155 member hospitals throughout the province. Much of this work is focused on member education and services that contribute to the overall quality and efficiency of the health care system.

Over the years, OHA’s member data had become fragmented and disorganized. Without a centralized process or system, OHA personnel were left to devise their own methods for collecting and managing member information.

“Our member records were everywhere,” says Robert Saggiorato, IT Manager for OHA. “Data was spread among Lotus Notes, Excel-based spreadsheets, two

dozen databases, and third-party vendor systems. Duplicate and out-of-date records were commonplace. And seemingly every time we worked on a new event or marketing activity, a new spreadsheet or contact list was established to support it, which added to the snowball effect.”

These disjointed data sets made it difficult to track, support, and communicate with OHA members. Coordinating and managing OHA’s roughly 165 annual events for more than 23,000 attendees required an array of redundant, manual processes. According to Saggiorato, more time was being spent manipulating contact lists and managing registrant data than working to create the best possible events.

Marketing efforts and member communications were also negatively impacted by the lack of a centralized member database. OHA marketers were using a variety of spreadsheets and lists,

many of which were out-of-date, to reach members and promote OHA programs. Data mining and analysis to better understand members, their histories with OHA, their areas of specialty, and their preferences were simply not possible.

"We needed a way to consolidate, maintain, and exploit our member information," Saggiorato says. "By integrating and standardizing our data, we had the opportunity to dramatically improve not only our internal processes, but also our member services."

Solution

In the midst of upgrading the association's messaging and collaboration infrastructure with Microsoft® Exchange Server 2007 Enterprise Edition and Microsoft® Office SharePoint® Server 2007, OHA leaders determined the time was right to improve its member management capabilities.

"We were revamping our internal systems, and CRM [customer relationship management] was a logical next step," Saggiorato explains. "In addition to consolidating our member data, we wanted the ability to streamline our processes and take advantage of things like e-commerce and online registration."

After a thorough evaluation, OHA leaders selected Microsoft Dynamics® CRM 4.0 Enterprise Edition to manage its member information and aid event coordination and marketing efforts. The solution runs on Microsoft® SQL Server® 2008 Enterprise Edition data management software, and links with OHA's new Exchange Server 2007 and SharePoint Server 2007-based environments for widespread data and process amalgamation.

"When I first saw Microsoft Dynamics CRM, I thought to myself, 'this is cool,'" says Saggiorato. "I kept thinking about all the things we could do with it and the ways it would help us take advantage of our member data."

pavliks.com, a Microsoft Gold Certified Partner, facilitated systems deployment and integration. The Ontario-based technology service provider also built a custom member portal for OHA, which supports online event registration and e-commerce, using Microsoft® .NET Framework.

"From interoperability and maintenance standpoints, the solution has been a dream," Saggiorato notes. "Quite frankly, we anticipated more hiccups. But everything has been seamless and we've been able to hit the ground running."

Benefits

Currently used for education and marketing purposes, OHA's new Microsoft Dynamics CRM solution will eventually act as the primary database for all OHA member services. In addition to bringing together member data that had been dispersed among dozens of databases and spreadsheets, the solution is helping OHA reduce costs, automate key processes, and better understand its members.

Cost Savings. Previously, OHA relied on third-party vendors to manage attendee registration for its 165-plus annual events. With a robust, centralized CRM system and custom portal that supports online registration and e-commerce, OHA is now much more self-sufficient.

"External vendors are expensive," says Todd Hutchings, Director of Distance Learning for OHA. "There was a setup cost

for each event, a six dollar charge per transaction as well as credit card fees. With Microsoft Dynamics CRM and our new online member portal, we can handle event registration ourselves, which will save us tens of thousands of dollars per year."

Process automation. Events are not only less costly for OHA, but also much easier to organize and carry out. Up-to-date member data is now easily accessed, and workflow automation provided by Microsoft Dynamics CRM facilitates routine processes and empowers OHA personnel. In the past, for example, a webinar necessitated vendor support, a full purchase order process, and at least four days to set up. Today, any OHA department can access the CRM system and produce a webinar. The process takes about four minutes.

"Our new CRM system allows us to focus on our events instead of the underlying attendee and registration data," says Hutchings. "And because everything is centralized and key processes are fully automated, we can increase the number of events we host without adding headcount or budget."

Improved data mining and member analytics. Cost savings and internal efficiencies aside, Saggiorato says greater visibility and control of OHA member information will prove to be the most beneficial aspect of the new CRM solution.

"Our member data used to be a burden, but it is becoming an increasingly valuable asset," says Saggiorato. "With Microsoft Dynamics CRM, we can mine and analyze our data to better understand the people we support. This leads to improved member communications and services, which are two of our core goals."