

Microsoft CRM and the NHS

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*Mark Varian, Royal Free Hampstead
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Background

The Royal Free Hampstead NHS Trust has approximately 900 beds and sees about 700,000 patients a year from all over the world. They employ around 4,600 people and have a turnover of about £450m.

Their services include a major accident and emergency service, all branches of surgery and medicine, a renal service serving the whole of north London, paediatrics, maternity services, care of elderly people, an adolescent psychiatric service and one of two high-security infectious diseases units in the country.

They are renowned for their specialist services including liver, kidney and bone marrow transplantation, renal, AIDS/HIV, infectious diseases, plastic surgery, immunology, paediatric gastroenterology, ENT surgery and audiological medicine, amyloidosis and scleroderma. They are a leading cancer centre with a range of specialist diagnostic and treatment services in oncology and haematology and a major neuroscience base with a network extending throughout north London and into the Home Counties. In association with

the on-site medical school, they run internationally recognised research and training programmes.

Much of the medical research is of international status and the trust is recognised as a leading site for the training of doctors, nurses, midwives and professions allied to medicine.

The Challenges

In addition to providing quality care, NHS hospitals such as the Royal Free continue to search for ways to communicate better with GPs, increase patient satisfaction and assist patients in proactively managing their overall health.

The NHS Constitution, published on 21 January 2009, establishes a new right to choice and to information to support that choice. The new patient right makes choice a core feature of a responsive NHS in the 21st century. As of 1 April 2009, this right to choice became legal, so patients now have the power to choose which hospital they are referred to by their GP. This legal right lets patients choose from any hospital offering a suitable

Benefits

- **User Experience:** The Outlook Integration and way CRM can be accessed via Outlook was well received by the users. They felt it to be familiar and intuitive interface that would ensure high end user adoption.
- **Commercials:** Microsoft CRM created a category of its own that ticked the functionality box and budget box.
- **Flexibility:** Microsoft CRM could be adapted as needs changed or other departments were introduced
- **Workflow:** Powerful workflow engine which effectively becomes an unpaid employee in the background automating tasks and creating reminders for follow up activities.

treatment that meets NHS standards and costs.

NHS Trusts now need to promote their services to GPs and patients, and the Royal Free Hospital saw this new legislation as an opportunity to further increase the number of recommendations they get from GPs as well as improving patient satisfaction. They also understood that without the proper tools and

an effective communication platform, the process to long-term change would not happen.

The Solution and the Partner

The Royal Free had a limited budget. Before seeing Microsoft CRM, the other solutions reviewed fell into two categories:

1. Could do what they needed but were out of budget
2. In budget but could not do what they needed.

After contacting a few companies about solutions available to them within their budget and scope, the Royal Free chose Pythagoras, who was able to provide what they needed at the right price. And since Microsoft provides discounted licence pricing to the NHS, Microsoft CRM created a category of its own that ticked the functionality and budget box. What impressed Mark Varian was the fantastic support he and his team received from Rachel Mylrea, who project managed their implementation.

The Royal Free chose Microsoft CRM to be the core platform to help them manage relationships, communicate more effectively and promote their services to both GPs and patients.

Mark Varian, Director of Marketing at the Royal Free sees Microsoft CRM as a key tool in the trust's success. One-to-one marketing is an integrated approach that must permeate all areas of a

hospital. One-to-one marketing recognises the lifetime value of loyal GPs and patients who make repeat recommendations to use the hospital's services.

The Benefits

Prior to using Microsoft CRM, the Royal Free was using Excel spreadsheets with contact details of GPs and patients. Communication was made by post, and typically they were limited to one main newsletter a quarter.

The solution integrated seamlessly with Microsoft Office Outlook, and the integration meant less application-switching, faster adoption by users, and higher productivity. Users can look up GP and patient information, send and manage emails, set up appointments, and capture discussions – all without ever leaving Outlook.

The new Microsoft CRM system allows for newsletters and patient announcements to be sent electronically via email, which feeds back directly into the Microsoft CRM system. They can now send out monthly newsletters to GPs as well as important announcements instantly, such as the swine flu pandemic plan. Apart from quicker communication routes, the new Microsoft CRM system has allowed users of the system to be more efficient, and they now spend less time on unnecessary administration.

Although the Royal Free was looking to initially fulfil a business requirement in one area, they liked the fact that Microsoft CRM could be adapted to changing needs within the hospital. They also liked how after the initial training, some of their own IT staff could do some of the training themselves, therefore ensuring a lower total cost of ownership.

The Royal Free was impressed by the powerful workflow engine which effectively becomes an unpaid employee in the background, automating tasks and creating reminders for follow up activities. They felt this area had huge potential in efficiency savings going forward.

What the Future Holds

Mark Varian also sees the Microsoft CRM installation as a platform that will allow staff to improve patient satisfaction and to make other improvements to various sectors of the hospital. For instance, if the Royal Free wanted to explore the possibility of opening a walk in x-ray service, they can test the proposed service with past patients to explore their thoughts on the idea, and through the responses received, plan changes to the services they offer.

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