OPTIMISE YOUR SALES PROCESSES

Dynamics 365

Microsoft’s suite of Dynamics 365 applications provide not only traditional CRM functionality, but solutions that are effective for all kinds of organisation.

Want to know how Dynamics can work for you? Webcurl is a Microsoft Partner and can offer advice and support in choosing the right solution, get you set up with customisation and development, or provide ongoing support.
DETERMINE HOW YOU DISPLAY YOUR CRM DATA

WebcurlCRM

For some organisations, the per-seat licensing arrangement adopted by the majority of CRM vendors can seem prohibitive.

Built on open-source technology, our in-house solution allows you to discover the benefits of CRM technology, but without license headaches. Featuring first-class integration with our CRM Portal solution, and available hosted or on-premise, WebcurlCRM is a powerful way to streamline your workflow.
A dedicated tool is going to offer much more functionality and ergonomic consideration than a hybrid tool, as is the case between PowerBi and CRMs with regards to data analytics. Integration of PowerBi into your CRM is both possible and, in many cases; recommended to ensure the best possible analysis of your CRM data. Both Dynamics 365 and WebcurlCRM can be readily integrated with PowerBi, giving you a choice of inbuilt data analytics, or the dedicated PowerBi tool, which will offer many more options for data analysis.
CUSTOMISED CRM DATA DISPLAY

CRM Portals

Amazing as any CRM is at storing your customer information and handling your business processes, there is no denying that the display and input of this data is not necessarily user friendly. Our CRM portal allows you to connect a Drupal website to your CRM, providing a customisable, extendable interface onto your CRM through which you can manage your data efficiently and easily. Our CRM Portal can also be integrated with any number of additional services, allowing maximum utilisation of your data within all required services and systems.
It was clear that the HTA required a more standard, secure and reliable way to accept and manage the information it receives. So in 2012 the organisation went out to tender for a new web portal through which information could be received.

Jamie explains: “It was very important to us that the portal integrated tightly with our Microsoft Dynamics CRM system, and that it would be quick to deploy. The proposal from Webcurl stood out because they had skills in both Drupal, which our website is built with, and Microsoft Dynamics.”

In addition, the solution proposed by Webcurl was “orders of magnitude” more cost-effective than some of those proposed by the big consultancy firms, something important to this public sector body.

Jamie continues: “Webcurl’s proposition offered a great value, based on a open source platform with quality systems from a team that really seemed to know what they were doing. We were also attracted by the autonomy their delivered solution would give us.”

Enriching the Environment

The human tissue authority (HTA) was created by parliament as an executive agency of the department of health. It was set up in 2005 to regulate organisations that remove, store and use human tissue for research, medical treatment, post-mortem examination, education and training, and display in public. It also gives approval for organ and bone marrow donations from living people.

The interests of the public and those it regulates are central to the HTA’s work, as it seeks to build on the confidence people have in regulation by ensuring that human tissue and organs are used safely and ethically, and with proper consent.

It aims to foster an environment of trust so that more people will be willing to donate their tissue for scientific and medical research, their organs for transplants, and their bodies for medical education and training and, on that basis, to help healthcare to flourish.

Vital Information Management

Jamie Munro is head of business technology at the HTA and is responsible for the systems that manage the vital and sensitive information held by the Authority. He says: “As a public sector regulator we have a lot of information we must collect. This includes information about all the establishments we regulate, any enquiries from both professionals and the public, and records of all reportable incidents.”

“In addition, every two years, establishments must complete compliance update information.”

The HTA had been collecting this information in a variety of ways, and previously there was no standard format or method of receipt. As a result, information was being received in emails, as attachments, by post, and even by fax.

Choosing a Supplier

At the time of the project, the HTA was working to implement new legislation which provided the perfect opportunity to test the system, as Jamie explains: “Webcurl put the platform together and let us loose. We could then build and test the new forms required to implement this legislation with Webcurl’s support. It was very collaborative and they certainly know what they are talking about.”
Huge Time Savings & Improved Reporting

“Having the portal has helped us to manage the information that is submitted to us,” continues Jamie. “We know nothing is going missing, or getting lost in translation. We are no longer dealing with paper documents or potentially double entering information into systems, so it has saved us a lot of time.”

Because the information submitted through the portal is automatically logged in the CRM system, the HTA can be confidence that any reports it runs are accurate and up to date.

In addition to improved visibility, the solution delivered by Webcurl has given the HTA the ability to create and maintain the forms available on the portal.

Jamie says: “Our new Codes and Standards are being implemented in April, and we have work underway to build the necessary forms into the system – and that is something we can do ourselves. That’s one of the main advantages of the Webcurl system: the degree of autonomy it gives us.”

Fulfilling Requirements

As a public sector organisation, the HTA has a duty to reduce the administrative burden on the establishments it works with – something the Webcurl solution has also helped the HTA to achieve.

“Webcurl has made it easier for us to meet our requirements in terms of the burden section, because it streamlines the process so well.”

“We can now make it easy to complete the reports, because Webcurl can pull out the information we already know about that establishment from the CRM system and pre-populate the forms for them, so there is less for them to fill in,” explains Jamie.

“We also know that they know exactly where to go to complete the information – they won’t be digging around on the website to find the form they need.”

A Secure Future

The web portal is now a key part of the HTA’s future strategy. The HTA team are already working on rolling out additional services for the establishments it works with through the portal.

“Because the web portal is integrated so tightly with our CRM system it gives us an opportunity to automate many of the administrative tasks we used to do manually.”

“The advantage of this is not only realised in administrative time savings, it also ensures that we eliminate errors that might have arisen from out-of-date information, incorrect data entry or other problems.”

“We can ensure that the information that establishments view on the portal is live and tailored to them and we can ensure that our CRM system is always up to date without any administrative effort.”

“The Webcurl web portal project has been – and is continuing to be – a great success.”

One of the main advantages of the Webcurl system is the autonomy it gives us.
Webcurl created a tailored application based on Microsoft Dynamics for London charity Tower Hamlets Education Business Partnership which has helped to improve the administration and reporting of its many programmes in the borough.

Tower Hamlets Education Business Partnership is an education charity that bridges the gap between students and the world of work in one of London’s most complex boroughs.

Tower Hamlets is home to many global financial businesses, employing some of the highest paid workers in London, but also some of the most impoverished communities and has the second highest unemployment rate in London.

Tower Hamlets Education Business Partnership (THEBP) therefore plays a vital role. Working with employers to help students build confidence and skills, with the goal of ending poverty through education and partnerships with local businesses. To this end, THEBP runs a number of volunteer partnership programmes in conjunction with local businesses, delivers training and coaching services, and acts as a broker of work experience placements.

EFFICIENT MANAGEMENT

Each year, the charity works with more than 10,000 volunteers, 800 companies and over 100 schools. David Burgess, Senior Manager at THEBP, describes the situation: ‘There are a lot of moving parts in what we do, and we needed a modern system to help us keep track of the people, companies, projects and placements we work with.’

THEBP had been storing its lists of students and volunteers in a MS Access database, but this was also being supplemented by individual spreadsheets that were held locally by programme coordinators. This posed a major problem when THEBP wanted to produce reports about volunteer activity for its partner companies. As Ana Svab, Senior Partnerships & Communications Manager (LCP), explains: ‘We simply didn’t have all the information in one place. By the time we had responses from everyone involved, it could have taken us a week to produce the report. This didn’t make us look good in the eyes of our partners.’

MS DYNAMICS

It became clear to the team at THEBP that a new system was required for managing the administration of the various programmes. Ana explains what happened next: ‘MS Dynamics was recommended to us, as it would enable us to store all the information in one place. When we saw it, we realised it was very intuitive for anyone who is familiar with using Windows.

In 2014, THEBP started the process of getting a new system by engaging an IT company to deliver a tailored CRM application based on MS Dynamics. This company struggled to deliver everything it promised and brought in Webcurl to undertake some of the development for it.

David says: ‘We were very impressed with Webcurl. The team were very responsive and were able to find solutions when we needed them to. They are very professional and on the case.’

CHOOSING WEBCURL

As a result, in 2015 THEBP asked Webcurl to completely take over the development, deployment and support of the CRM system. Following the first phase of delivery, THEBP has been delighted with the ease with which it is now possible to run reports for its partner companies.

Ana explains: ‘We have a lot of reporting to do for donors and companies as they need information about our activities involving their staff for their annual reports. Those annual reports will be audited, so it is really important that the information we give them is accurate. The new system is far more efficient than the old process we had to go through to gather the necessary information. Because it is all held in one place, we can be sure it is accurate and the information is available in just a few clicks instead of the days it took before. We are able to be more professional.’
We are very impressed with Webcurl.

REAL TIME & COST SAVINGS
As well as time savings, the new system has delivered significant cost savings. THEBP used to send information about DBS checks and child protection policies out by post to each volunteer.

David says: “We would send 100 to 200 out each month, depending on the time of year – in total we sent around 2,000 letters out per year. Now the new system sends all this information out by email and automatically updates the CRM when the volunteer checks a box to say they have read the email. As well as savings on postage, we can be more confident the letters are being read.”

If the volunteer doesn’t check the tickbox to say they have received and read the information, the system can send an email reminder. THEBP team simply creates a group of people who haven’t checked the box and sends an email reminder to everyone in that group.

WORK EXPERIENCE MANAGEMENT
Following on from these early successes, THEBP asked Webcurl to integrate the functionality of its work experience management application into the same MS Dynamics CRM system.

Up until 2015, THEBP had been using a leading work experience management system that was not integrated with the CRM system. In 2015, Webcurl began replicating the functionality of the existing system within the MS Dynamics solution.

Chlöe Dalton joined THEBP’s Preparation for Work team in 2015 and describes her experience of the two systems: “When I joined, I was using the original system for a few months before we moved fully over to the new Webcurl system. As someone who had to learn both systems at the same time, I can say that the Webcurl one made a lot more sense and was a lot easier to use and learn.”

In particular, the Webcurl system had the advantage that it combined all the functionality needed to manage the work placements in a single system.

Chlöe says: ‘In our old software, we had to login twice, once on our side and once on the client side. The Webcurl system is much better. I now login once to access all the information and the information the schools add via the web portal is automatically updated in the system for me. It’s also easy to click and change between schools; it takes just a few seconds to do this or to allocate jobs. It’s very quick.’

FASTER PROCESSES
The biggest advantage for Chlöe, however, has been the capability to automatically send all the details out to schools about placements via email.

She explains: ‘We used to send out letters as confirmation, and this was very time-consuming. It could take a week for the letter to get there and sometimes it didn’t get to the right person. We run to a tight schedule: once the placements are offered everything moves at a fast pace. Now the students can contact the companies immediately, rather than having to wait a week for the letter to arrive. That is one of my favourite things about the new system.’

As well as helping students and speeding up back office processes, this has meant significant cost savings on postage. Chlöe’s team works with around 3,000 students every year, and used to send out around 2,000 letters over the year – that’s a lot of second-class franking eliminated! “It saves us a week,” says Chlöe, “it is much more efficient and better for the environment.”

BETTER FOR SCHOOLS
Chlöe is also confident that the new system makes it easy for the schools to access the information they need: ‘They can print out visit forms for teachers and job descriptions of roles for the students and it is all in one place for them,’ says Chlöe.

IMPROVED REPORTING
Webcurl has delivered some bespoke report templates and functionality for THEBP. In particular, this has already paid dividends for the industry volunteer programme team, as Ana explains: ‘For many of our funders it is important for us to show the impact of the work we’ve been doing.

‘Funding my role has depended on our ability to demonstrate this, and the Webcurl solution has made our reporting so much more efficient, I consider that it has directly enabled my contract to be renewed three times – without it, I don’t think we would have been able to secure that funding.

David is equally full of praise for the Webcurl team: ‘We have found them very responsive and helpful – they know their stuff and they provide us with solutions as and when required. I would definitely recommend them.’

Chlöe is in full agreement: ‘I would definitely recommend Webcurl and the system – in fact, I already have! Another EBP from a neighbouring London borough will be coming to take a look at it in the new year.’
It was the real-time integration of data that would deliver optimum benefit for the Skillnet recruitment team; enabling them to contact good candidates immediately to maximise their chance to place them – something that had not been possible before.

Mark already knew about WebCurl’s rapid development capabilities and was confident its solution could deliver the real-time data Skillnet needed.

There were four websites to deliver: the main Skillnet site, plus a branded site for each of the major manufacturers it works with – Ford, Daf and Scania. WebCurl delivered the main website first, based on the Skillnet designer’s brief.

“Delivery of the full-featured corporate site went very smoothly and on time,” says Mark.

It then moved on to the branded manufacturer sites, with WebCurl working directly with the corporate branding teams of each manufacturer to ensure the development met their guidelines.

The Ford site also required compliance with a strict set of security requirements and, again, WebCurl took the reins.

Mark says: “We had to undertake a security audit with a great deal of technical detail about the architecture and data and WebCurl took the pain out of that for us. The Webcurl team were very responsive to what we needed to get it signed off by the Ford team.”

The most important benefit was WebCurl’s site architecture. All four sites shared a common database which linked in real time with the Microsoft CRM system – thereby solving the two major headaches of the business: duplication of data and data never really being up to date.
It was a very successful project.

Mark explains: “By implementing this integrated solution, WebCurl enabled us to eliminate the data duplication issues that were prevalent before. For example, when a candidate uploaded their details to more than one website. As well as the recruitment team enjoying more rapid visibility of candidates, WebCurl also delivered lots of whizzy new features, such as the ability to search for candidates within a given geographical radius from a vacancy.”

In addition, the WebCurl solution was integrated with the website of Skillnet’s functional skills training partner, Forskills. This enabled candidate data to be passed over to the Forskills website, so candidates could undertake online aptitude tests as part of the application process.

The WebCurl solution has also enabled Skillnet to take ownership of site content.

The Skillnet team can now make amendments to the online application form templates themselves. Previously, they had been reliant on their incumbent website provider to respond to change requests and make amendments for them.

As well as providing greater control and speeding up the change process, this has helped to significantly reduce the cost of day-to-day maintenance. “It was a very successful project that met our business brief,” enthuses Mark.

“It was a smooth implementation that moved quickly and WebCurl were very supportive in getting it live, being available for support and responding quickly to us. I would highly recommend WebCurl - they do what they say they are going to do and are helpful, communicative and highly responsive.”

It was a smooth implementation that moved quickly and Webcurl were very supportive.