



At a glance

Industry

Disability Services

Location:

Queensland, Australia

Solution:

Microsoft Dynamics CRM

Function:

Education and training support for people with a disability; family support; employment.

Business Objective:

Create an adaptable client contact management system capable of meeting the changing, stringent government reporting standards.

Business Benefits:

A flexible system that supports the business while placing minimal demands on IT personnel

CRM scans the whole horizon

The Horizon Foundation is an Australian leader in the field of disability services. The Queensland based, not for profit organisation helps its clients develop and update employment skills, offers post-school employment programs and job finding assistance. It also provides family, emergency and crisis support.

Every year more than 1,700 people with a disability, injury or illness access the foundation's services. In 2007, the valuable role that it plays was formally recognised when Horizon was honoured with an Australia Day Award for 25 years of service to the community. In 2010, Horizon was named in BRW's *"Top Best 50 places To Work"* in Australia.

The business of service provision

This extremely successful organisation, Horizon has revenues of \$10 million annually and directly employs 170 staff. The business is divided into a number of distinct operations, each of which has its own contact recording and reporting

requirements. These are mandated and standardised by government as a requirement of its contribution to Horizon's funding.

Over the past decade, Horizon has seen client reporting and compliance demands grow ever more complex. The nature and breadth of client and business data that must be captured and reported to government has steadily increased, creating a complex operating environment. Moreover, the disability sector has been particularly subject to changeable government policies.

By mid-2012 it was clear that the business requirements could no longer be met with Horizon's mix of an inflexible CRM system, spreadsheets and paper reporting.

"Things like funding policies and how funding is delivered can change quite drastically without much notice," explains IT manager, Anthony Rankine.



"We needed to be able to adapt to those changes quite quickly."

What followed was a brief software selection process and a rapid-fire CRM replacement project measured in days rather than months or years. At the end of the project, Horizon had rolled out a comprehensive Microsoft Dynamics CRM implementation involving multiple instances of the customer relationship management database to support its many, varied, and complex needs.

Dealing with limited resources

From beginning to end, the implementation faced a number of challenges. First was the need to turn paper-based systems into a new IT implementation. Secondly, it all had to be done with limited resources.

Rankine knew he had to work within a tight budget since as far as is possible, Horizon's priority is to spend on delivering services, not on internal operational matters. Yet, as Horizon's sole IT staffer, Rankine also recognised that he was going to require a professional CRM system that came with great implementation services, strong ongoing support and solid training.

Fortunately, Horizon was offered access to Microsoft's donor pricing program, thus making the market-leading Microsoft Dynamics CRM solution an accessible and obvious software choice. To carry out the implementation, Horizon turned to Professional Advantage.

Sharing the knowledge

Work began in earnest when Rankine sat down with a team from Professional Advantage including CRM Solution Consultant, Adrian Iredale.

"We spent about 30 hours with Adrian," Rankine said. "I dumped a load of information about Horizon on him and in that time, he was able to turn that background into a usable system. He showed me how we could replicate a lot of our existing processes inside the CRM system."

Initial activity focused on developing two separate databases, representing the needs of two of the organisation's service areas. Iredale explained every step to Rankine, making sure he passed on the skills that would be needed if Horizon was to operate independently in future.

"Adrian was open to teaching me along the way. He taught me advanced program functions that I wouldn't have found on my own and I'm very thankful that he did that!," Rankine

admits. "In three days, he'd taught me enough to go to work on our different service areas. It also inspired confidence to see how much knowledge he had about the product and how the product could be used far more extensively than we first anticipated."

Armed with this experience, Rankine took the lead in developing the remaining databases. This helped to minimise implementation costs by removing the need to engage additional consultants. It also gave Rankine an opportunity to further develop his knowledge of the new system, with the assurance of nearby help, should he need it.

CRM in action

Rankine cites Horizon's job placement service, Link Personnel, as a great example of just one of the ways the company uses Microsoft Dynamics CRM today. "When Link Personnel interacts with a client, at any point, we need to keep a record of the communication, and that communication has to be recorded against twelve government standards," he explains. Working with some guidance from Professional Advantage, Rankine created a custom CRM entity for Link Personnel that allows users to assign every communication to those twelve standards. "This makes for very easy reporting when the time comes," Rankine says.



"Link Personnel also needs to track each client's outcomes, such as job placement, because a good outcome means extra funding for Link Personnel. This requires maintaining a job history for each client which is then used to track the client's progress and income to Link Personnel on a monthly basis."

Iredale believes the key to this capability is the underlying flexibility of Microsoft Dynamics CRM.

"There are a lot of front-end tools that allow us to modify the system, it's easy to create a new entity, new relationships between entities, and generate new fields and forms to make it easy for the end users."



Looking ahead

Horizon's close partnership with Professional Advantage has continued well past the initial roll out. Rankine says he periodically calls on Professional Advantage for help and at times, he admits, it occurs with very little notice.

"Out of all my dealings with consultants over the years, Professional Advantage has provided us with the best service we've experienced."

Microsoft Dynamics CRM suits the Horizon Foundation so well that it is now being used across the entire organisation. While most CRM implementations stay within the confines of customer contact and marketing activities, at Horizon, the CRM system has become an enabler of all of its activities. Even so, Rankine is still finding new ways to gain value from the solution; to streamline and enhance business processes. In the near future, for example, he plans to replace the organisation's paper-based workplace incident management process with reporting and analysis via Microsoft Dynamics CRM. Further down the track, he hopes to add Microsoft SharePoint for better document management and is also looking at integrating Microsoft Dynamics CRM with Horizon's accounting system.

Rankine concludes, "The biggest thing for me has been the flexibility of Microsoft Dynamics CRM. We're moving well outside the lines of CRM and making solutions that we could never have made before. I've been able to get a greater understanding of the business due to this project. I've also been able to work more closely with all the service areas, understand their day-to-day processes, and turn that into something they can use and do much easier."

About us

Professional Advantage is one of Australia's most awarded solutions providers, with over 20 years experience in helping organisations improve their business systems through industry leading software solutions. Our 250-strong team in 6 offices across Australia and internationally has successfully worked with over 1000 organisations.



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