

## Case Study - NHS England Dynamics 365 Implementation

### Our Client

NHS England was formed in 2012 as an executive non-departmental public body and play a key role in the Government's vision to modernise the health service. NHS England's key roles are to:

- Allocate resources to Clinical Commissioning Groups and support them to commission services on behalf of their patients, according to evidence-based quality standards;
- Directly commission primary care, military and offender health and specialised services including high security psychiatric services;
- Take autonomous decisions about how best to allocate commissioning resources, remaining accountable for ensuring expenditure remains within limits set by the Secretary of State for Health;
- Focus on achieving equal access to health services, designed around the needs of the patient, for which we will be held to account by Ministers and Parliament; and
- Deliver improved patient outcomes.



### Project

The Customer Contact Centre (CCC) receives calls and correspondence from members of the public which includes complaints, concerns, enquiries, FOI requests and data subject rights requests. These contacts are logged on a Customer Relationship Management (CRM) System, which permits contacts to be efficiently managed and distributed to various parts of the organisation for resolution.

FlexRM were contracted to replace the existing Dynamics 365 implementation which was delivered by another partner. The previous implementation was becoming increasingly difficult to maintain and each upgrade required various elements of the solution to be updated before this could be completed. These factors resulted in the solution becoming untenable and a new implementation required.

## Challenges

There were several challenges with the project including:

- Challenges with the IT infrastructure resulted in it not being possible to integrate Dynamics 365 and Exchange in the previous implementation. FlexRM worked with various teams to get this integration setup in the new environment, ensuring a big win for the start of the project.
- The data structure in the previous system caused issues and as a result FlexRM worked collaboratively with NHS England to design a new structure. This resulted in additional complexity with the data migration exercise and the mapping / transformation had to be agreed by both parties.
- The system has around 250 users made up of:
  - The NHS England CCC
  - Regional and Local Complaints teams
  - The Strategic Complaints team
  - The National FOI teams
  - The National and Regional Data Protection and Information Governance teams
- Each team had unique business processes which needed to be mapped out whilst taking into consideration security implications.
- Over 6 million records were migrated from the previous implementation. This was successfully migrated using FlexRM's proven methodology and toolsets.

## Solution

FlexRM successfully delivered a CRM solution which is used to log complaints, concerns, enquiries etc. The solution enables NHS England to:

- Use the CRM to take a holistic view of complaints management. This ability enables NHS England to see and analyse problems and trends through effective reporting
- Cases are properly tracked and monitored for compliance with requirements set by the business, both by individual case officers and by management teams
- The project has resulted in a streamlined operating model improving case handling efficiency
- Information is now stored in a single location, reducing duplication and permitting time savings that can be invested in resolving cases than in managing multiple systems
- The nature of complaints and feedback can be more easily categorised, giving a more dynamic view of the issues being presented.
- Relevant information can be presented to a case handler, avoiding the need for service users to repeat details
- Transparency is improved, and reporting can be generated that can be shared with other teams in the organisation.