



Linkwood Solutions

Dedicated Microsoft Dynamics NAV Professional Services Partner



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Linkwood Solutions optimise Microsoft Dynamics NAV for Age Concern Enterprises



April 2010 - Age Concern merges with Help the Aged

Requirement for system development

Linkwood Solutions engaged as IT Partner

Develop scalable, highly configured solution

- Established Microsoft Dynamics NAV user
- Rebranded as Age UK

- To accommodate demands of both organisations

- Existing 2 year relationship

- Using Microsoft Dynamics NAV at the core
- 140 users in a multi-company environment

Challenge

A longstanding user of Microsoft Dynamics NAV (previously Navision) for over 10 years, Age Concern Enterprises needed a Microsoft Partner capable of supporting a complex Microsoft Dynamics NAV system integrated with their call centre.

In early 2008, they moved their IT support over to Linkwood Solutions. In April 2009, it was announced that Age Concern was to merge with Help the Aged to provide even better services and support for older people, be able to raise even more funds, have greater influence and be able to exert more pressure on policy makers.

The impact of the merger for Age Concern Enterprises was that they needed to upscale their call centre operations and it was decided that a nationwide call centre capable of supporting the demands of the two combined charities was required.

The merged charity rebranded to Age UK in April 2010 and to support their strategy of building awareness of the services Age UK provides, what it does and how people can get involved and benefit, it was decided that the call centre system would also need to support outbound campaigns from the second half of 2010.

Solution

Following a comprehensive audit by Linkwood Solutions, they identified that in order to support the needs of the merged charity they needed to introduce additional functionality to the system. This included new credit card technology, compliant with FSA legislation and Computer Telephony Integration (CTI), enabling the contact details and all related information to pop-up on the screen within Microsoft Dynamics NAV when a call is received. This ensured that the system supports payments by any method and also streamline the call handling workflow to improve productivity and reduce the time it takes to process calls.



About Age Concern Enterprises

With 278 employees, Age Concern Enterprises Limited is the trading arm of Age UK, a UK charity whose mission is to promote the well-being of all older people and to help make later life a fulfilling and enjoyable experience.

Age Concern Enterprises provide a complete portfolio of products and services specifically catering for the over 50s. This includes motor and travel insurance, funeral plans, independent financial advice, legal and will writing services. They also sell their widely acclaimed personal alarms for the elderly and disabled. This is a device residing on a pendant or wristband that provides assurance that help is on hand if required. When the device is pressed, the customer's phone base unit dials an Age Concern Enterprises operator within the Emergency Response Centre who confirms that help is on its way and contacts either the nominated key holder or the emergency services to provide the assistance that is required. The system operates 24/7, 365 days per year.

All of these services are provided via the Emergency Response Centre and two traditional call centres with over 60 call operators. All of the profits from Age Concern Enterprises go direct to the charity.

<http://www.ageuk.org.uk>



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The Microsoft Dynamics NAV system also integrates with the emergency response system that supports the personal alarm devices in use by over 40,000 elderly and disabled people. The Microsoft Dynamics NAV system feeds all related contact information including medical details into the emergency response system so that if the personal alarm device is triggered, the operator can immediately see all the details that relate to that individual. Linkwood Solutions configured the CRM functions within Microsoft Dynamics NAV and developed the module that transfers the data to the emergency response system.

Following the merger of the two charities, 9 different companies operate within one Microsoft Dynamics NAV system, including Age Scotland, Age NI and Age Cymru. Age Concern Enterprises is planning to add 3 more companies to the system later in 2010. Power users of the system are able to quickly navigate between 5 or more charts of accounts easily, a function that provides real benefit within the finance department.

Linkwood Solutions also worked with Age Concern Enterprises to develop Microsoft Dynamics NAV integration with Microsoft Outlook. This has enabled the Personal Alarm Division staff to have visibility of the relevant field salesperson's calendar based on their geographic territories and quickly confirm appointments with the prospective customer without delay. The operator is able to see which time slots are available and applies intelligence to the choice of appointment slots to ensure that the salesperson isn't travelling inefficiently back and forth. Once the appointment is confirmed, the appointment goes straight into the salesperson's Blackberry device.

The combined solution supports a total of 140 users on the system, with an Emergency Response Centre and two traditional call centres staffed by 60 operators.

Benefits

"We are now a one stop shop for a whole range of products and services for the over 50s. We have improved the call handling workflow and can record the details much more quickly. Call handling rates have gone up, and most importantly, call centre operators can do everything in one system, all within Microsoft Dynamics NAV," said John Crail, IT Manager for Age Concern Enterprises.

For example for every call we receive, the CTI integration within Microsoft Dynamics NAV pops up a single screen view of tailored information to an assigned operator. More than just basic customer information, call centre staff can see call histories, order histories, enabling them to provide a better customer experience in a structured way, without the need to work to call scripts.

This improved productivity in the call centre has provided additional benefits. It has offered the flexibility in the level of training that can be provided and it can be customised with what they want.

The system can now accommodate outbound calling campaigns, supporting the launch campaigns of Age UK and beyond. John Crail continued "With the help of Linkwood Solutions, we have been able to develop the call centre functionality to drive outbound call flows using customer records in Microsoft Dynamics NAV. We rely on the services of Linkwood to support the expansion of our organisation with their consultancy expertise. Furthermore, with mission critical systems in place such as the Personal Alarm Division emergency response system, it is vital that our systems work all the time."

Nic Lamb, Managing Director of Linkwood Solutions said, "The implementation of Microsoft Dynamics NAV at Age Concern Enterprises is an excellent example of how we can fully exploit its configuration and integration capabilities, enabling organisations to realise the benefits of working within one business management system. We have really put the systems multi-company capabilities to the test as Age Concern Enterprises continue to add more companies to the system and interoperate between the different sets of accounts".

Future

Currently on version 4 of Microsoft Dynamics NAV, Age Concern Enterprises are planning an upgrade to Microsoft Dynamics NAV 2009 later in the year and are looking at harnessing the advantages of Microsoft SQL Server 2008 and its web enabled functionality in particular.

John Crail said, "The solution has been very scalable over the years. In fact I can't think of anything that Microsoft Dynamics NAV hasn't been able to do with the support of Linkwood's

integration and configuration skills. With an upgrade to the latest version and the addition of new hardware, we are confident that the system will continue to provide the level of performance and robustness that our organisation depends upon."

Partnership

John Crail concluded, "We very much see Linkwood as an extension of our IT department. For example, instead of employing a dedicated in-house programmer, we know that we can rely on Linkwood's know-how to develop the system further. Whilst Linkwood isn't the largest Microsoft Partner in the UK, we recognise their superior expertise and they have very detailed knowledge of Microsoft Dynamics NAV. If we need support, we can place a call and we always get a response straight away leading to an appropriate action, be it remote support or an onsite visit."

Linkwood Solutions work to an annual support contract; however their approach is to work in a less formal, trusted relationship. Indeed, most of the Linkwood team are familiar with their solution and have been on site at some point. Linkwood conduct regular systems review meetings and have regular calls with Age Concern Enterprises to ensure that the Microsoft Dynamics NAV system continues to follow the direction of the organisation.

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