



IRW Systems Limited
concept to realisation



Microsoft
GOLD CERTIFIED
Partner

"IRW were efficient and professional which enabled us to implement the solution with a minimum of disruption to staff and maximum benefit to the organisation."



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The Health Foundation — Dynamics CRM 4

THE CUSTOMER: The Health Foundation is an independent charity working to continuously improve the quality of healthcare in the UK. The Foundation wants the UK to have a healthcare system of the highest possible quality—safe, effective, person-centred, timely, efficient and equitable—believing that in order to achieve this, health services need to continually improve the way that they work. Working at every level of the healthcare system, they aim to develop the technical skills, leadership, capacity, knowledge, and the will for change; that are essential for real and lasting improvement.

THE REQUIREMENT: To produce a system in Microsoft Dynamics CRM 4.0 which will allow them to manage their intelligence system used to track opinion formers within the health industry and those individuals who they have sponsored as Fellows of the Foundation.

THE SOLUTION: A large scale customisation project was undertaken by IRW that incorporated business rules captured in workflows; integration with external systems undertaken by compiled server side plugin code; and reports written by Microsoft SQL Server Reporting Services. There was also a data migration exercise where Excel sheets containing business contacts were cleaned and imported into CRM.

IRW was able to leverage existing CRM functionality around the base Accounts and Contacts record types to build a system that allowed the Foundation's senior management team to quickly identify key players in their industry; run events and seminars; and manage the relationship with anyone from front line hospital doctors, to government ministers (and their devolved counterparts) along with members of relevant committees.

BUSINESS BENEFITS: Key deliverables and benefits from IRW Systems included:

- Single source of all contact information, consolidating and centrally holding what was a series of business cards held by senior members of the foundation into a proper information management system
- Ability to identify important decision makers within organisations at any level
- Ability to target specific audiences for marketing materials and invitations to seminars
- Ability to track junior doctors who were awarded fellowships as they progress through their careers