



Case Study: Royal Society for the Blind

Customer Relationship Management System - October 2020

Introduction

In July 2019, Sonya Weiser of Wiser Technology Advice was approached by Rob Dempsey, Executive Director of The Royal Society for the Blind, to review their problematic customer relationship management (CRM) system.



The Royal Society for the Blind (RSB) is a not-for-profit organisation providing services to South Australians who are blind or have a severe vision impairment.

These services are delivered by a professional, committed and highly qualified team supported by volunteers, drawn from all age groups and walks of life.

Blindness or vision impairment can have a severe impact on a person's lifestyle. Service provided by RSB assist people to overcome their vision impairment and participate independently in the community.

The problem facing The Royal Society for the Blind



Prior to Rob Dempsey's appointment as Executive Director, RSB had purchased a CRM system called Enrite Care (which was later taken over by Lumary), linked to a scheduling system called Skedulo.

These systems were running on the Salesforce platform.

The Lumary and Skedulo systems were overly complicated, expensive and not effective for RSB. Operational staff were having difficulty using the systems, which were almost impossible to use for staff with vision impairments. Executive management were getting different results every time reports were run, indicating problems with the data that was being input into the systems, and there was a long list of system fixes, modifications and enhancements which Lumary were not responsive to.

Rob requested Wiser Technology Advice undertake a post implementation review to evaluate the systems, understand whether they were meeting the needs of RSB and whether they should continue with these systems or consider alternatives.

Like many of our clients, Rob wanted expert independent advice to navigate the sometimes overwhelming world of technology, helping to sort through the often complex and technical information from software vendors.

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How Wiser Technology Advice helped



The post implementation review revealed that the problems experienced by RSB were not caused by the underlying Salesforce platform, but by the software vendors. Frustratingly, the issues identified which impeded efficient use of the system were not being addressed by the vendors of Lumary or Skedulo.

This is a common problem with software systems, implementation of the technology is the easy part of projects; the hard yards come with supporting the people who use the technology.

Here's a summary timeline showing what we did to help RSB:

- In September 2019 workshops were facilitated by Wiser Technology Advice, which were attended by operational staff and management of RSB, to discuss issues, analyse data flows, map business processes and gather requirements.
- We then analysed the requirements of RSB and explored several alternative options for RSB going forward. A comparison between software vendors and solutions was conducted over multiple meetings with the vendors, who provided high-level estimates of the capital and ongoing costs of moving to an alternative solution.
- Our report recommended that RSB move from the Lumary/Skedulo system to a CRM called AvantCare, by vendor Illuminance Solutions.
- In December 2020, the board of RSB approved a budget for implementation of the new CRM, subject to due diligence.
- The original plan for go-live of AvantCare was 1st July 2020, however the RSB board required negotiation of a contract with the vendor, to mitigate the risk of running into the same problems of poor support service and nothing in writing that defined the service level agreement.
- Contract negotiations were extensive and in-depth, but after months of going back and forth with draft contracts we were successful in finding a happy middle ground for RSB and Illuminance Solutions.
- Work on implementation of the AvantCare system started in April 2020 and go-live of the system was 6th October 2020.
- Wiser Technology Advice prepared test scripts and managed user acceptance testing on behalf of RSB.
- We also developed a set of process maps and procedures to use with the new system, as well as videos which describe the procedures for the visually impaired users.



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In Rob's own words:



We asked Rob Dempsey, Executive Director of RSB, to provide us with feedback.

Here's how he responded:

“RSB was at a cross-roads. We had just implemented the Enrite Care Software with Skedulo scheduling system 18 months earlier and it was clear that system was not working for us on any level. Faced with unhappy users of the system and only being able to extract basic reports from the system along with increasing concerns associated with data integrity and poor responsiveness from the vendor it was necessary to undertake an external and independent review. I engaged Sonya Wiser to undertake that review. Sonya undertook an extensive analysis talking with all parts of the organization and mapping all processes. She concluded the system was a long way from meeting our needs and recommended migrating to an alternate system. The report provided was professionally written, comprehensive and beyond question.

Given that Sonya now had in-depth knowledge of RSB we re-contracted her to lead a team to investigate alternatives which included review of multiple software solutions and in conjunction with users from across the organization ultimately selected AvantCare by Illuminance Solutions as the preferred option. Sonya worked extensively with Illuminance in developing the framework for our system, contract negotiations with Illuminance, and on the implementation of the system.

My staff all report that Sonya was wonderful to work with commenting that ‘she listens’ to their needs and concerns. She has fine attention to detail, can easily grasp complex situations and processes, able to streamline bottlenecks and overcome poor processes. The implementation of AvantCare whilst an enormous amount of work was made all the easier by Sonya's professional guidance.

I would have no hesitation in recommending Sonya and would happily engage her again should the need arise.”