

BETASOFT

CASE STUDY

Implementing a Microsoft 365-hosted
Contact Management Solution for the
Arrhythmia Alliance NFP

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CUSTOMER:

The Arrhythmia Alliance

The Arrhythmia Alliance (A-A) is a coalition of charities, patients and patient groups, carers, medical groups, and allied professionals.

Although independent, these groups work together under the A-A umbrella to promote timely and effective diagnosis and treatment of arrhythmias. A-A provides support, information, education, and awareness to all those affected by or involved in the care of cardiac arrhythmias.





Introduction

In 2021 the A-A went to the market to find a replacement for their outdated contact management software. A modern and future proofed solution was needed to accommodate new pattern of work and at the same time cater for a growing client base with better and more efficient software tools.

The team at A-A understood the benefits of a Microsoft 365 solution to the organisation, including:

- Employee mobility
- Ease of working
- Security and compliance



Previous Solution

The A-A has been using Act!, an on-premise customer relationship management software, originally launched in 1987, for many years.

Challenges:

- Product was end-of-life. Limited support by vendor.
- Dated software architecture prevented users from working remotely.
- Lack of robust data security and the potential for cyber-attacks.
- Poor User Experience. Most staff felt it was too difficult to use.
- Poor user experience led to a move to spreadsheets, a growing number of spreadsheets and that sprawl of 'data silos' lead to data duplication and inaccuracies.
- Tied to the vendors own marketing system.
- Lack of reporting tools and report customisation.



Objectives

CLOUD | CONSOLIDATE ON MICROSOFT 365 | SSO | REPORTING |
PROCESS AUTOMATION | SECURITY | COMPLIANCE

The desire was to adopt a cloud-based solution that offered information security and better integration with Microsoft Office applications.

There was a need to provide better and more flexible reporting options as well as the capacity to utilise process automation to automate repetitive tasks. The charity is ambitious about their growth plans and hopes to achieve those goals with increasing the use of software technology.

Generally, it was recognised that consolidating data held in spreadsheets as well as Act! into a single, Microsoft 365 ecosystem would bring advantages in the long term. A single source of truth would assist with current and future regulatory, information compliance requirements.

The Solution

CLOUD | MICROSOFT 365 | SHAREPOINT | SHAREPORTALS | SSO |
OUTLOOK ADDIN | SECURITY | COMPLIANCE

After an extensive scoping and planning exercise Betasoft deployed their SharePortals CRM solution to the client's Microsoft 365 tenant. The solution was customised and configured according to the agreed design.



DATA CLEANSING AND MIGRATION

Significant amount of time was committed to cleansing and migrating existing data, found in the legacy system as well as a large number of spreadsheets. Clean customer and partner data was then ingested into their new SharePortals site.

Results and Benefits

01

Secure, Cloud Contact Management Solution for effective staff home working.

02

Microsoft 365 Ecosystem with Single Sign-On, Office App Integration and Outlook Interface.

03

Sophisticated and customisable reporting and Analytics with Power BI.

04

Consolidated and trustworthy data for patients, relatives, carers, and healthcare workers.

The Voice of the Customer



“We had to replace an outdated, on-premise CRM system which was no longer supported by the vendor. We came across SharePortals as an easy-to-use contact management system and one we could obtain within our rather small, annual CRM budget. It ticks all our boxes.

The Outlook Add-In makes it so easy to track email communications with our patients and healthcare professionals and even lets us store email attachments as documents in the system.

In addition to emails, we use it to record notes and tasks against a contact. And as all the data lives in our own Microsoft 365 environment we have full control over it, which helps us meet some critical data protection regulations. The team at SharePortals provide great support. They helped us clean and migrate all the data from the old system. We are really happy so far.”

Conclusions

With Betasoft's help and expertise and SharePortals and Microsoft 365 as their platform the Arrhythmia Alliance group have significantly modernised their Customer Relationship Management systems and processes.

OUT

Outdated, office-based solution with limited but costly vendor support. Clunky user interfaces. Users spilling out into Excel spreadsheets.

IN

Secure and compliant, Cloud Contact Management Solution for effective staff homeworking, Microsoft 365 Ecosystem with Single Sign-On, Office App Integration and Outlook Interface.

The foundations are now laid for accommodating modern working pattern.
Recruiting new staff will be easier.

SharePortals and the Microsoft 365 platform enable better security and information compliance. The Microsoft 365 Ecosystem and Power Platform tools offer opportunity for further, custom data analytics and business process automation.