



Client: AXA PPP healthcare

Tisski supported AXA PPP healthcare with the initial planning and implementation of Microsoft Dynamics CRM.



Tisski supported AXA PPP healthcare, one of the largest providers of occupational health support in the UK, with the initial planning and implementation, and the subsequent upgrade of Microsoft Dynamics® CRM.

AXA PPP healthcare: Company Background

AXA PPP healthcare is part of the AXA Group which provides a comprehensive range of products and services across insurance, healthcare, and financial services. AXA PPP healthcare provides occupational health support for employers and employees. The services offered cover both physical and psychological health problems.

The Business Challenge

AXA PPP healthcare went live with the first phase of the implementation of Microsoft Dynamics version 4.0 into the occupational health side of the business in November 2009, with an upgrade to CRM 2011 in September 2013. The system was introduced to replace two legacy systems used by the occupational health and psychological services sides of the business. The first phase saw the successful implementation of Microsoft Dynamics CRM within the Sales and Marketing teams.

Using two separate systems caused a number of problems. Information and data silos had begun to develop which lead to wasted time and loss of efficiency caused by the need to input and search for information across the two different software solutions. The objective of implementing a single system was to streamline processes and create more data transparency, making things easier for staff and third party affiliates. A single system would also make it easier for the company to deliver five star customer service.

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Key Benefits:

AXA PPP Healthcare have seen a number of benefits from the implementation of Microsoft Dynamics CRM:

- Increased integration and data transparency between the two sides of the business
- Improved processes
- Enhanced information and reporting
- The system will serve the business over the longer term
- Easier to use systems with the familiarity that comes from using a Microsoft product
- Elimination of task duplication
- Easier to provide five star customer service
- Ability to integrate the system with external resources such as Bing Maps
- Interactive dashboard reporting.

AXA PPP healthcare Said:

'The Tisski team were key in helping us to formulate our requirements so that Microsoft Dynamics CRM would do exactly what we needed it to'

Tom Herbert, Application Development Manager

Case Study

Product: Microsoft Dynamics® CRM

The Business Solution

Microsoft Dynamics CRM was selected as the preferred solution for AXA PPP healthcare because of its flexibility. The project saw the development and delivery of two separate on premise systems, located in Glasgow and Eastbourne, to accommodate the different data requirements for each side of the business.

To make this work in the best way for the organisation, Tisski worked closely with AXA's project team to ensure that:

- Both systems were customised to meet the data collection and reporting requirements for both sides of the business
- Relevant data was synchronised between the two solutions so that staff only had to add information to one system and that all information regarding a case could be accessed easily
- The overall implementation would be able to handle the high number of cases dealt with by the AXA team, this is currently estimated at being up to 100,000 per year.

Tom Herbert, Application Development Manager for AXA commented, "The Tisski team were key in helping us to formulate our requirements so that Microsoft Dynamics CRM would do exactly what we needed it to."

Using Microsoft Dynamics CRM at AXA PPP healthcare

The second phase of the implementation of Microsoft Dynamics 4.0 went live in November 2011 into the psychological services area of the business, with an upgrade to version 2011 in August 2012. The solution is currently used throughout the whole of AXA PPP healthcare's Health Services Division and caters for 400 users, it is the lynchpin for effectively delivering the services that the company offers, across both occupational and psychological health.

Providing Occupational Health Services

On the occupational health side of the business the team at AXA provide employers and employees in large corporate organisations with health advice, and access to occupational health and healthcare professionals and assessments. Each call that comes into the team is logged and managed within Microsoft Dynamics CRM.

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"Tisski were a pleasure to work with – quality guys who know their stuff. They are masters at explaining the technical in understandable language, and translating even the vaguest of business requirements into glorious CRM reality!"

Tom Herbert, Application Development Manager

Microsoft Dynamics is used for:

- Call management, production and sending of letters, and setting of appointments for health assessments
- Arrangement and allocation of follow up actions for team members and external users
- Data and information collection
Information delivery
- Accessing relevant information from the psychological health team.

Case Study

Product: Microsoft Dynamics® CRM

Microsoft Dynamics is used for:

- Call management – the AXA team record details of calls received and any future actions that need to be taken. This can then be used if required by another member of the team, occupational health and healthcare professionals, and the psychological health team.
- Production and sending of letters and setting of appointments for health assessments
- Arrangement and allocation of follow up actions for team members and external users
- Data and information collection – as well as logging calls, users of the system can log contact details and add supporting information on a case by case basis
- Information delivery – a portion of the service offered by AXA PPP healthcare is advisory. If a client wants some specific information, the location of the nearest relevant healthcare professional for example, a link to Bing Maps and information documents within Microsoft Dynamics CRM can be accessed. This makes it easier for the team member to give as much information over the phone to the customer as possible.
- Accessing relevant information from the psychological health team.

Providing Psychological Health Services

On the occupational health side, the office based team at AXA often speak to the employer or employee directly. They are able to take in-depth details and then forward these on to a healthcare professional to follow up on over a period of time. However, when dealing with psychological issues, sometimes time is of the essence.

To make sure that Microsoft Dynamics CRM worked effectively for this side of the business, the Tisski team had to carry out some essential development work. The system had to be modified to ensure that:

- A counsellor or mental health professional could speak to a caller directly without going through the standard administration process and discussion with a member of the AXA PPP healthcare team
- A case could be created by inputting the minimum amount of information, this is especially useful when dealing with delicate situations
- Any information from the occupational health side of the business can be seen within the system.

Tom commented "It was essential that we accommodated the different requirements of both sides of the business, but that any shared information which could help the team member or healthcare specialist to deal with a particular case could be accessed easily. That's why Tisski implemented Microsoft Dynamics CRM in a way that they would talk to each other and share information, despite being separate systems, and without users needed to repeat data input processes."

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AXA PPP healthcare Said:

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**Tom Herbert, Application
Development Manager**

Client: AXA PPP healthcare



Product: Microsoft Dynamics® CRM

The Business Benefits of Using Microsoft Dynamics CRM

AXA PPP healthcare have seen a number of benefits from the implementation of Microsoft Dynamics CRM:

Increased integration between the two sides of their business

Before Microsoft Dynamics CRM was implemented the organisation was running two separate systems in parallel with each other. This meant that information wasn't openly shared, data input processes had to be repeated, and time was wasted. Now there is transparency of data across systems and cases, and internal and external users can get access to the information required as and when they need it, making for much more efficient processes.

Tom continued, "We have always prided ourselves on the high levels of customer service that we offer, however, before Microsoft Dynamics CRM this was harder to achieve. There were silos of information and very little data transparency. Our occupational health and psychological health teams were, when it came to technology and data management, working completely separately. That's all changed since we went live with Dynamics."

Improved processes

Whilst scoping system requirements, and throughout the implementation of the system, AXA took the opportunity to further improve processes internally and with the healthcare professionals who would be using the system. As with any software implementation and data migration project, any previously hidden inefficiencies were highlighted so that they could be looked at and improved by the team.

Enhanced information and reporting

With both sides of the business using different versions of the same system, and with those systems communicating effectively, AXA found that big picture reporting and data analysis was easier. One of the services that the organisation provides involves the distribution of industry reports, details of industry trends, and relevant information to their clients, Microsoft Dynamics CRM accommodates this by reporting from a single data set across the two systems.

The system will serve the business over the longer term

The flexibility that Microsoft Dynamics CRM offers is a huge benefit to AXA. Ease in development and training means that the system will easily grow with the company and any future changes can be easily accommodated.

The Future at AXA PPP Healthcare

The Future of Microsoft Dynamics CRM for AXA PPP healthcare

Although there are no current plans to upgrade to the latest version, the organisation continues to expand their use of the system. AXA's in-house development team are currently looking at adding web portals that will feed seamlessly into both systems, further benefitting users.

As the current project progressed, and through the training and support provided by Tisski, AXA began to build an internal development team. A library of internal training support materials has also been established to ensure that everything that the system's 400 users could possibly need is available in-house. Tisski were more than happy to support AXA in becoming fully independent with Microsoft Dynamics CRM.

About Tisski:



At Tisski we are dedicated to making a positive difference to your business. As a provider of CRM (Customer Relationship Management) and ERP (Enterprise Resource Planning) solutions we pride ourselves on delivering world class solutions.

Our long serving, experienced team of certified Microsoft Dynamics CRM & Dynamics NAV experts drive efficiency improvements, from lead tracking, account management and management reporting, to financial management, supply chain management, manufacturing and helpdesk support.

If you are considering a CRM or ERP system, please ask about our 'zero risk, try before you buy' implementation policy. Our customers were glad they did! Contact the team today on 0247 7712050, or email info@tisski.com.