sugarcrm

Methodist Homes Improves Services and Support for Communities Members Through Streamlined Approach to Admin and Activities with SugarCRM

mha
Live later life well

About Methodist Homes also known as MHA

For more than 80 years, people have been choosing MHA to support their needs and aspirations in later life. The national charity provides vital services to older people across the UK through its 80 care homes, 59 retirement living schemes and 43 MHA Communities hubs, where people have been forging friendships and finding comfort and spirituality which lie at the heart of the country's largest charitable care provider.

Industry ///

Charity

Location ///

Derby, UK

Website ///

www.mha.org.uk

Streamlining support

MHA provides much needed support to people across the UK through a number of services – from chaplaincy to dementia care, music therapy and green care. All require a team of dedicated and passionate individuals to run, manage and continually improve services for the benefit of older people. Community groups and activities is one such area which has been growing in demand in recent years, run by MHA Communities. But operational processes and administration functions designed to support service provision were struggling to keep up, putting unnecessary strain on local teams and hampering improvements.

"The support we offer across the country is constantly evolving in line with peoples' individual needs and those of their local community. But despite this, our teams were still relying on outdated manual, paper–based processes to sign–up and manage members, make assessments and plan activities. This was not only time consuming but meant there was no standardised or centralised way to collect, collate and analyse data. This made it very difficult to generate monthly member statistics, identify areas of success and better plan services based on insights," explains Alison S., Head of Volunteering and Support Services, MHA Communities Directorate.

Being able to track members journeys and understand their current and future needs to support their wellbeing was vital, but this information was not forthcoming. The sheer amount of time wasted on handwriting information, uploading it to different databases multiple times and trawling through disparate data to find information led Alison and her team to assess new ways to streamline administration across all MHA Communities schemes.

Selecting SugarCRM

Through networking and desk research, MHA considered a number of CRM technology suppliers whose solutions would reduce the amount of time spent on administration, enabling the team to increase the cover of support offered to members and service users. During this evaluation process the Covid–19 pandemic hit, which further highlighted the vital importance of having a centralised, digital resource to enable support services to continue when needed most.

On review of a shortlist, SugarCRM was selected as the preferred supplier based on the scope, flexibility and ease of use of the system. Working with CRM software partner Provident CRM, who implemented and rolled out the system, MHA could very quickly see value. Through mock–up solutions and example scenarios tailored to their needs, the team were able to understand the true impact that

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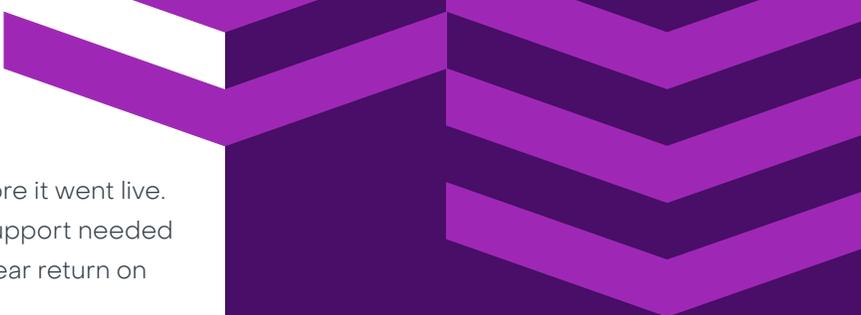
SugarCRM could bring to their organisation – even before it went live. Provident CRM was also key to providing the ongoing support needed by Alison and the team to engage users and ensure a clear return on investment.

"The teams using the new system have different skill levels and experience when it comes to using IT. One of the key considerations when choosing the SugarCRM platform was how intuitive the system is and the comprehensive resources and support available for what was a huge change management programme. To aid adoption success we devised three packages of training to suit different styles and skill levels. We also rolled out a mix of packages to a small number of schemes each week to ensure everyone was given the level of attention and support they needed along the way," adds Alison S.

Championing change

Following the initial rollout, MHA set-up a CRM user group to support successful adoption of SugarCRM. Made up of different levels of colleagues from each operational region, every member was made a system champion, helping to manage user queries and highlight any issues to the wider group. In conjunction with this, Alison and the team used the Sugar Club resource and community to support with refinements and ongoing improvements following initial system configuration. This has not only connected MHA with similar organisations using the SugarCRM platform but demonstrated the untapped potential of the system for future business gain.

For new colleagues and to ensure existing users have an opportunity to refresh their skills, MHA put in place an ongoing training programme which includes weekly drop-in sessions, themed sessions and introductions to new areas. All sessions are recorded and knowledge shared across the organisation to ensure continual learning and improvements.

Set-up for success

Since using SugarCRM to streamline administration across all Communities schemes, MHA has been able to successfully introduce a digital membership management system to provide central oversight of members and activities. Users can create tasks and track actions to ensure no one falls through the cracks.

Not only has this ensured improved management of records but improved quality and robustness of data leading to clarity and more informed decision making. Administration time has significantly reduced, as has time spent identifying the correct data for external reporting.

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"Prior to SugarCRM, the details of a new member would have to be written or keyed multiple times — on their referral form, assessment form, review forms, newsletter mailing list, greeting cards list, group bookings and registers. SugarCRM eliminates multiple keying of data, and a huge amount of admin time has been saved as a result. With such positive feedback and success, we have already started to explore further areas where the platform could improve processes, including volunteering, incident reporting and fundraising," concludes Alison S.

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We're an independent consultancy that works with leading digital solutions for CRM (Customer Relationship Management) and business processes. We've helped hundreds of teams across Ireland, the UK, and Europe roll out customised systems that make their work lives easier, so they can better serve their customers. We dedicate our time to getting to know our clients to find the right solution for their business, build workflows that make sense, enhance cross-team communications, and create automations that cut through admin so everyone can focus on what matters — their customers' success.

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About SugarCRM

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