

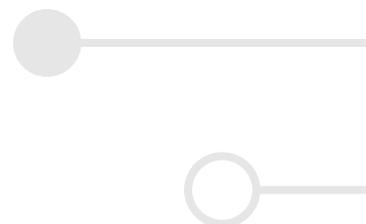


**LOADED** TECHNOLOGIES

## **Transforming aged care into the digital era**

How a consumer directed approach prompted the need for digital and organisational transformation

Powered by



# Wesley Mission Queensland is forging ahead in a new world.

**This innovative Community Services provider is transforming its approach to winning business and servicing customers as it adapts to regulatory change and digitally savvy consumers.**

Prior to Consumer Directed Care (CDC), the Government would assign budget packages to providers but with the new legislation it's the end users who decide what to do with their budgets. Kris Sargeant, Director Community Care & Inclusion for WMQ explains: "The CDC really puts choice and control in the customer's hands, and the customers get to have a much bigger say in the types of services they want and how they want them delivered."

WMQ quickly embraced the fact that consumers are overtaking government as their key stakeholders, and recognised the need to engage directly with the people they serve. "We needed to understand how we would acquire customers in a different way than a tendering process through government," says Sargeant.

The trouble was, information about WMQ customers was previously spread across

departments, systems and spread sheets. To get to know customers better and engage with them personally, WMQ needed to bring all information together to create a single view of each individual.

WMQ decided to use technology just as a competitive business would – to manage information centrally, and use it to understand customers and build stronger relationships with them.





## Where to start?

WMQ launched a competitive CRM tender during which they weighed up a number of options including Microsoft Dynamics, Salesforce and SugarCRM.

The SugarCRM solution proposed by Loaded Technologies was chosen. Sugar's flexibility meant that WMQ's strategy could shape the CRM solution, and not the other way around.

## Fast, flexible implementation

After a 3-month planning phase, Loaded managed an agile implementation which allowed WMQ to learn and adjust the scope as it unfolded, and enabled a fast and incremental go-live. WMQ started to use its CRM just four weeks after implementation began in February 2016.

Over the next eight months, the CRM was rolled out across central services (Contact Centre, Marketing and Fundraising) as well as key operating divisions, including In Home Care and Residential Aged Care.

Integrations with care systems helped progress the goal of a single customer view, and drive efficiencies across the organisation.

WMQ has gradually extended the CRM solution to support other divisions since 2016, including Retirement Living, NDIS and Volunteers management. Incremental improvements to business processes and the CRM solution have been made for all areas, to ensure that important acquisition and retention metrics can be tracked.

“

Sugar offers a flexible, user-centric tool that supports our shift towards a customer-centric strategy,” says Sargeant, adding: “We chose SugarCRM’s open software because it would provide incredible ease of use for staff at every level, enabling them to engage with customers and stakeholders effectively.”

---



## An evolutionary solution

Powering WMQ's CRM solution is the Sugar platform, which enables end-to-end acquisition and retention strategies.

The CRM provides a single view of the customer, and when combined with Sugar's API makes it straightforward to share data with other key business systems.

Sugar Market is transforming how mid-sized marketing teams reach audiences and measure success throughout the buyer journey.

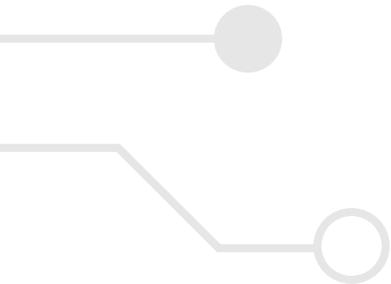
Sugar Market provides a leading edge tool to deliver marketing campaigns focused on both new customer acquisition as well as campaigns to support existing customers.



We have learnt that a single customer view requires us to think, plan, act and manage very differently. Implementing the right technology is just one element of the answer... we need to take a very different approach to how we design and manage our core customer-facing processes. We need to think carefully about the skills, capabilities and roles needed to manage aspects of the customer journey, and set up the management rhythms so we're constantly thinking, talking and making decisions with a customer-first lens. It's certainly hard work, and ultimately it requires a change in culture."

**Selina Beauchamp, CIO at WMQ**





# About Wesley Mission Queensland

Since 1907, Wesley Mission Queensland (WMQ) has been helping people across Queensland to build stronger and more inclusive communities. WMQ is an integral part of the Uniting Church in Queensland and operates as a mission activity of the Albert Street Uniting Church. They are an innovative and responsive not-for-profit community service provider, supporting more than 100,000 people in Queensland each year, and 3,500 members of the Deaf community across Australia through their National Auslan Interpreter Booking Service.

---

## SugarCRM

The right CRM can revolutionise your business. A good CRM is more than just a contact management system, instead it can give you a single view of your customers and allow you to tailor your service to their specific needs, throughout the sales and marketing process.

The right CRM, implemented well, can be a powerful business tool. SugarCRM can boost lead generation, improving sales processes and reporting and make customer experiences more memorable, increasing overall satisfaction.

We recommend SugarCRM because their offering is the best in the market. Deployed to 2 million individuals in over 120 countries and 26 languages, Sugar is recognised by leading

analysts as both a visionary and an innovator for Sales Force Automation.

Sugar offers an industry-leading customer experience, a simple interface and an intuitive customisation platform. As an Elite Sugar Partner, we will help you to streamline your business operations and deliver in-depth trends and predictions about your customers.

**Call us on 1300 562 333**

# LOADED TECHNOLOGIES

Loaded Technologies is a deeply experienced CRM consulting company with a unique combination of enterprise-grade rigour, entrepreneurial spirit, commercial savvy and technical depth. We work in partnership with our customers and technology vendor partners to deliver and support comprehensive CRM solutions.

**[www.loadedtech.com.au](http://www.loadedtech.com.au)**

**1300 562 333**

**[sales@loadedtech.com.au](mailto:sales@loadedtech.com.au)**

