

Business Link South Yorkshire enhances service delivery with Captavia™

INTRODUCTION

The Business Link network is dedicated to business and workforce development support throughout England. Business Link South Yorkshire (BLSY) offers practical help and advice to established businesses and business start ups in the South Yorkshire area from its four offices in Barnsley, Doncaster, Sheffield and Rotherham. These provide a range of advice and guidance on issues such as

- Starting a business
- Finance and grants
- Taxes, return and payroll
- Employing people
- Health and safety
- International trade
- E-business
- Marketing



The Requirement

BLSY wanted to improve the delivery of its business support services as well as being able to accurately determine how it performs against key business measures, including adherence to standards for the delivery of central government programmes. The business rules were well established in the existing implementation of Initiative Software's Linktrack® system. However, the Business Advisers wanted to streamline the data entry process. In addition, improved reporting capabilities were required to support both internal and external management tasks. The data from the CRM system would be used to generate the reports. BLSY highlighted a number of areas of its business that required improvements in CRM functionality:

- Improvement in data quality
- Streamlined and consistent workflow
- Reduced lead time for new programme definition within the CRM
- Faster and simpler data entry for government support programmes
- Customisable data entry and display screens

Solution

BLSY decided to migrate from LinkTrack® to Captavia™. The Business Advisers were involved in the creation of the workflow process and related screens. Following a short pilot phase, the system was rolled out to all Business Advisers in less than a week.

Users have quickly adopted Captavia™, which has proven very easy to use, powerful and flexible; changes can easily be made to the screen design and process flow. There has been a high adoption rate amongst the Business Advisers because they were completely involved during the development of the Captavia™ screens and workflows. The Business Advisers receive relevant reports on their own and group activities which allows them to monitor programme performance from the same data that is aggregated to show overall business performance. Business Advisers have been given access to run their own reports to allow them to track their portfolio.

Since the implementation of Captavia™, BLSY has experienced substantial benefits from its CRM system including,

- Improved consistency across teams
- Faster and more accurate management information
- Greater transparency in Business Advisers' information
- Tailored screens that reflect the information required by an individual user
- Clean, focused users screens

These come from the simple utilisation of powerful Captavia™ functionality such as,

- Customised screen and process definitions for both individuals and groups
- Ability to make rapid development changes
- Enhanced search capabilities
- Improved business segmentation utilising department views

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Client Relationship

“Since the initial implementation of Captavia™ we have been very impressed by the software. When we started the roll out of Captavia™ the users noticed immediate benefits and more people within the organisation wanted to use the system. All users have found Captavia™ easier to use as it guides them through exactly what they need to complete. The Business Advisers find it quicker to enter data enabling them to be more focused on their work rather than the traditionally perceived burden of data entry. Since implementation all upgrades have been successful and we have found Captavia™ to be a very robust and resilient system.”

Brian Atkins, BL South Yorkshire Database Manager.

