

GCC Case Study

Insight Gloucestershire – Microsoft Dynamics CRM



GCC helps Gloucestershire's oldest charity to increase productivity with Microsoft Dynamics CRM



Formed in 1858, Insight Gloucestershire is a registered charity dedicated to supporting sight impaired and blind people throughout the county. With five offices around the area, and more than 3,500 clients on their database, the main challenge is to record, access and update client information in order to provide responsive and efficient client service.

All client information had been held on a bespoke Access database, which had become increasingly problematic. Staff could not use the database remotely or add new client information when off-site. There were regular problems, including connectivity to other systems, and technical help was required for even the most basic maintenance and update.

It was decided that a more modern and robust database solution was essential if Insight Gloucestershire was to improve its service and manage growth. GCC were tasked to recommend a new system which would allow for a growth in client numbers and differing client needs, whilst being easy to access remotely across the five offices. The new system would also be required to enable the easy and efficient matching of volunteers with clients.

Once the solution had been identified, GCC would be required to migrate all sensitive data from the old system to the new system, with minimal disruption to the charity. Ease of maintenance was also an important factor, as Insight have no in-house IT support.

“ Naturally, we went with GCC as they translated our needs in a non-IT manner and we liked the personable way in which they approached the project. ”



The solution: Microsoft Dynamics CRM

GCC recommended that Insight Gloucestershire should install Microsoft Dynamics CRM - previously only available to large corporations. Microsoft Dynamics CRM enables the integration of all of the charity's systems, business and customer information into a single system, accessible to all staff, from any location.

As a result, the charity is now able to access and update client data quickly and easily from any location and to track and plan client activity. Mail merges and newsletters can be generated, to keep clients up to date, because Microsoft Dynamics integrates easily with Microsoft Office.

As a registered charity, Insight Gloucestershire were able to benefit from Microsoft's special charity pricing plan, giving them a substantial saving.

The benefits: increased productivity, efficiency and client service

The installation of Microsoft Dynamics CRM has increased productivity and efficiency for Insight Gloucestershire, enabling client data to be accessed, added and updated in real time, from any of the charity's offices.

One of the many additional useful features is the ability to follow up calls automatically when needed, without the need to use a diary or set up another reminder system.

Customer service has improved too, as all the information needed when speaking to a client is available and up-to-date for all employees, all the time.



“ The new solution has increased productivity levels by allowing staff to extract the information they need from anywhere, when they need it and it's updated instantly so all employees are up-to-date when speaking to a client. ”

Steve Martin
General Manager –
Insight Gloucestershire



Business led, technology driven, people centric

Copyright ©2015 GCC. All Rights Reserved. All company product or service names referenced herein are properties of their respective owners.

www.gcc.co.uk | 0845 260 1161
Birmingham | Gloucester | Bristol