



How Quitline is helping more smokers kick the habit, with a more focused, responsive service

Quitline
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MODERNISING A COMBINATION OF CUMBERSOME SOFTWARE TOOLS AND DATABASES

Quitline is a telephone-based counselling service run by Queensland Health that provides advice and referral services to clients who wish to give up smoking. Based in Brisbane, the service operates from a Queensland Health contact centre that employs 50 counsellors and provides over 1,200 consultations per month.

To manage the service and keep track of clients, Quitline used a combination of custom software tools and a database, but staff found them cumbersome to use and difficult to adapt.

“Our existing database didn’t contain all the information staff needed, and the information that was there wasn’t easily accessible,” says Shelley Peardon, A/Allied Health Coordinator, Health Contact Centre, Health Services Support Agency, Queensland Health. “As a result, counsellors didn’t have easy access to client information during a call.

“The database was also quite cumbersome for follow-up activities. For example, a clients’ address had to be lifted manually from the database and re-entered into the system we use to despatch medicines. It was very manual – we wanted efficiencies.”

While considering a replacement during 2011, Peardon and her staff faced changing reporting requirements from the service’s Government sponsors.

“The Government provided new funding, but to deliver on commitments we needed to provide much more detailed reports – specifically reports that identify different types of clients, and tracked progress and outcomes within each client segment,” says Peardon.

“To ensure we could provide adequate reporting, we needed to be able to record more data, interrogate it ourselves and design our own reports.

AT A GLANCE

Case Study
Quitline

Website
quit.org.au

Industry
Health

Company Size
50+

Country
Australia

“Speed was absolutely vital. We wanted to be fully compliant with reporting requirements for new programs by January 2012. This gave us just six months to build a completely new customer database and get it operational.”

THE SOLUTION

After consulting the Queensland Government procurement panel, Queensland Health engaged Microsoft through a standing offer arrangement.

“Our enterprise services delivery organisation, Microsoft Services, has the people, the methodology and the expertise to rapidly deliver,” says Brad Beumer, Architect for the Dynamics Centre of Excellence, Asia-Pacific & Japan, Microsoft Services. “We conducted a needs assessment, then worked with partners to create a solution based on Microsoft Dynamics.”

According to Beumer, Dynamics contained two features that made it ideal for Quitline. First, enhanced reporting, with an out-of-the-box report configuration tool that enables users to create their own reports in less than ten minutes. Second, it has advanced workflows that guide users through pre-defined steps, helping staff work more efficiently.

However, Beumer made the Microsoft Services delivery methodology a key aspect of the bid, believing it would guarantee on-time delivery.

“We have an agile, rapid-delivery method for CRM deployment that we’ve developed as part of our standardised Sure Step implementation methodology,” he says. “This methodology includes tools, templates and a series of best practices.”

The approach worked. “We chose Microsoft because they had a clear understanding of our needs, they had established processes, and they were willing to commit the resources to create the CRM,” says Peardon. “This made me confident they could deliver by December.”

The design to delivery phase took 12 weeks, starting in early October, and was executed by a mix of Microsoft staff, CRM specialists from Gold Certified Partners, and Quitline staff. The Quitline staff became a core part of the design, advising developers on what they liked and didn’t like through each of the build, test and deploy iterations.

One key part of the solution involved using Active Directory Federation Services to provide Claims-based Authentication. This meant that workers could easily log on to the CRM, even if they were working in a Novell operating domain.

“Microsoft had different people coming in at different times, focusing on specific things,” says Peardon. “Various staff provided regular status reports and managed project issues. They were very professional.”

A key deployment strategy was to avoid customisation by using as much out-of-the-box functionality as possible. At the start of the project, Beumer conducted a ‘Fit-Gap’ analysis that identified variances between Quitline requirements and out-of-the-box functionality. Beumer worked closely with staff to identify where it made practical sense to modify Quitline requirements because the cost and time savings outweighed anticipated usability benefits.

“I believe Microsoft had a commitment to get the CRM right; I believe they cared,” says Peardon. “Above all, their methodology worked. As a manager, I was able to keep up with the progress of the project and feel one step ahead.”

With a Microsoft SQL Server 2008 Enterprise database, the agency's new CRM system went live on schedule in December 2011. It provides integration with the Quitline telephone system, so staff can contact citizens direct from the database. Workflows manage call scheduling and rescheduling, helping staff ensure all calls are made on time.

THE BENEFITS

With its new CRM system, Quitline was able to start delivering new, highly detailed reports to the State Government in January 2012, ensuring they met funding commitments. With excellent information to hand, and automatically scheduled calls, Quitline counsellors can ensure citizens receive a more focused, responsive service.

HIGHLY ENGAGED WORKFORCE

Because Quitline staff became an integral part of the design, testing and review process, staff buy-in is very high.

“Our staff helped make the CRM, so there's a deep sense of ownership,” says Peardon. “This is critical because the CRM is now part of their everyday world – and because they're so engaged, they're doing things with the CRM that are really exciting.

“For example, if a client of Aboriginal and/or Torres Strait Islander descent calls, and would prefer to speak to an Aboriginal or Torres Strait Islander counsellor, staff can use the CRM to refer the caller to a particular counsellor.

“We can also analyse referrals, medications and outcomes by small sub-groups. We know when and where to follow up, and that makes the citizen the ultimate beneficiary.”

SELF-CONFIGURED REPORTING

A key improvement for staff is that they don't need technical assistance or expert database reporting skills to build new reports. They simply copy data into Microsoft Excel spreadsheets, from where they can create graphs or dashboards.

Peardon believes this empowerment improves motivation, productivity, and morale. “Staff can construct their own reports without technical assistance, which is a huge benefit to us. With reports that monitor their own progress and case outcomes, counsellors can analyse for themselves how they are succeeding in helping clients quit smoking.”

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