

“The support we received from Koorb after implementation has been impressive. From additional training to system enhancements I’ve found them to be responsive and friendly. They have gone above and beyond to ensure a positive experience of the software and that business improvements as envisioned were realised.”

– Roedolf Smit, Manager Data and Insights Team, Green Cross Health



Green Cross Health prescribe their own step-by-step CRM strategy for happiness.

Green Cross Health (previously known as Pharmacybrands) was established in 1981 under the Unichem name as a buying group for individual pharmacies throughout New Zealand. It has subsequently expanded into not only the largest pharmacy retail group in the country, but is also the only listed retail pharmacy group in NZ.

The company has two divisions, Pharmacy and Medical. The pharmacy division represents more than a third of all community pharmacies throughout New Zealand under the Unichem, Life Pharmacy, Amcal, Care and Radius brands, and holds equity interests in 70 pharmacies nationwide.

A focus on business readiness

By 2012 Green Cross Health had very clear short and long term growth plans, and knew that the key to enabling their vision was by implementing a scalable and integrated customer relationship management (CRM) platform.

A new CRM would address a range of legacy issues that had been caused by having data in siloes across several non-integrated backend systems. The challenges to be met included a lack of data integrity, the effort required to produce targeted customer lists to support the activities of the marketing department, and a lack of workflow automation that would enable the efficient delivery of customer services.

Much of the customer data was held in Toniq, Green Cross Health’s merchandising and POS system. Toniq manages dispensary and retail operations including an in-store card and a points-based customer loyalty programme. One of Green Cross Health’s loyalty programmes collected data from its online stores as well as actual pharmacies, and this data was held in a hosted third-party CRM solution. The data in this CRM was maintained separately and difficult to access, impacting on how effectively the company could deliver customer service.

The second phase would address the issues caused by the limited self-service functionality available to website customers. Users were unable to update their own address details, or view and apply reward points against purchases. Instead, they were obligated to communicate changes by phone or email to the Green Cross Health support office, who were required to make updates manually.



Industry: Primary healthcare
Project Type: CRM implementation

Quick Facts:

Website: www.greencrosshealth.co.nz

Customer Size: 300 franchisees across New Zealand

Solutions: Microsoft Dynamics CRM, Scribe, Microsoft SSIS for SQL Server Integration Services

Workstations: 18

Year: 2013

Benefits:

- Marketing empowered to run multiple focussed and concurrent campaigns with all loyalty programme data consolidated in one place.
- Data Management able to take control of the quality of the data using an exception report to address errors rapidly and efficiently and result in a higher level of data hygiene.

- Customer service realised immediate improvement through automated conversion of customer emails into cases, along with tracking, prioritising and escalation.

An integrated solution, a trusted partner

Green Cross Health chose industry-leading Microsoft Dynamics CRM 2011 as their solution. Not only would it work seamlessly as part of their Microsoft business ecosystem, but it is powerful and fully scalable.

Koorb Consulting, who were already Green Cross Health's Microsoft Dynamics AX partner, were appointed to implement and integrate Dynamics CRM. Koorb were a known quantity and considered highly competent, thus reducing potential risks with a critical project.

Experienced Project Manager Gloria Hooper was contracted by Green Cross Health to lead their internal team and work alongside Koorb's project manager, consultants and developers as they delivered Dynamics CRM and integrated it with Toniq and a range of other solutions. Hooper worked closely with Koorb throughout the process.

Lessons learned

The previous lack of system integration was a lesson taken on board when planning the new solution.

Hooper said "With the old CRM, Green Cross Health lacked control of their data because it was housed by a third-party CRM. Access to CRM data was so difficult that campaigns were being run by the marketing team with data extracted from Toniq on Excel spreadsheets. Although the campaigns were executed in a streamlined fashion, and to demand, they weren't recorded or monitored in a centralised customer database."

To ensure that the new solution overcame all previous obstacles, and gave Green Cross Health room to grow, Koorb proposed a two-stage CRM project which would ultimately deliver total integration with the company's loyalty programme, online stores, point-of-sale and enterprise digital marketing

platforms. The integration of the CRM across a number of touch points was absolutely critical to the project's success.

The solution used a range of products to make the flow of data seamless. Scribe data migration and integration software enabled data transformation, while Microsoft SSIS for SQL Server Integration Services tackled a broad range of data-migration tasks and provided a fast and flexible tool to support architecture. Full service Experian CheetahMail was chosen as the email marketing tool.

.Net will enable scalable integration as the company continues to grow, and new tools from Microsoft will allow Green Cross Health to adapt to changing technologies and to leverage the power of Microsoft's future innovations and investments.

Mastering CRM

Dynamics CRM 2011 addressed all of Green Cross Health's priorities, while being answerable to three distinct masters within the company - the Marketing, Data Management and Customer Services teams.

For the Marketing team, the first and most immediate priority was integration between Dynamics CRM with Toniq. The consolidation of data into Dynamics CRM resulted in Marketing being empowered to manage loyalty programme members more effectively. Although all the data they needed had been captured in Toniq, the Marketing team had until now lacked the tools to release, interrogate, segment and analyse the information to their advantage. With all the data now centrally collated in Dynamics CRM they will be able to produce highly targeted marketing campaigns for their pharmacies based on a customer's data including club card history, brand preferences, gender, age and location.

Roedolf Smit, who manages Green Cross Health's Data and Insights Team, said "With Dynamics CRM our ability to run multiple concurrent campaigns has increased drastically. Within our first month we have seen a five-fold increase in the number of campaigns we are capable of fulfilling."

Automated recurring email reminders could also be set up within Dynamics CRM advising customers of soon-to-expire vouchers, extending birthday greetings, communicating membership rewards and providing points updates.

The Data Management team can now take control of the quality of the data to ensure a higher standard of information aided by an exceptions report. "The exception report is run on a daily basis and produces a list of anomalies which can be reviewed in the CRM," said Hooper. "Within the report each record can be individually viewed with a single click to show what the problem was, for example an address which wasn't validated, or an incorrectly formatted email address. These exceptions are either resolved from the support office or referred back to the pharmacy to follow up and correct."





This produced the ability to address errors rapidly and efficiently and resulted in a higher level of data hygiene.

“Having reliable data has meant that we can generate more mailing lists and target our lists more accurately,” said Smit. “A formalised exception reporting and data quality process allows us to pro-actively manage sensitive information increasing customer satisfaction and campaign effectiveness.”

The quality of customer service immediately benefited from Koorb setting up Dynamics CRM’s case management functionality. Case management addressed the handling of customer feedback and queries from the website, automatically lodging customer emails in the CRM and creating a case. Based on their subject line (for example: ‘change my delivery address’) emails are now assigned to a team or individual using the Dynamics CRM router, and further prioritised depending on implied urgency. Escalation rules are applied to generate alerts when cases are not closed or dealt with within set timeframes.

“Koorb did the case management component within a few weeks,” said Hooper. “This delivered immediate benefits and a quick win to the business and demonstrated Koorb’s value as a nimble partner who can scale up or down to deliver a strong ROI.”

The results were fast to materialise too, as Green Cross Health can now view customer query audit trails and evaluate and measure the performance of those responsible for their resolution. The use of Dynamics CRM’s case management module guarantees rapid responses to customers, as emails can’t be lost or ignored, effectively elevating customer happiness.

Over-the-counter support

As well as improving the customer experience, the new platform enabled Green Cross Health to serve their pharmacies more effectively.

“Green Cross Health’s pharmacies represent a mixture of ownership models,” said Hooper. “There are fully owned pharmacies, partnerships, and franchises. It’s important to find

a way to give a value proposition in terms of the service that is provided to them, so they all engage fully.”

In addition to delivering marketing solutions which reflect the varying types of ownership models, Green Cross Health has a variety of marketing models. These include direct to consumer, direct to the pharmacy customers, and direct to website customers.

“With five brands of pharmacy, over 300 pharmacies and 180 licensees, Green Cross Health has a very complex set of relationships to manage efficiently and effectively,” said Justin Fogarty, Executive – Acquisitions, at Green Cross Health. “The strategy was to form a bond with the consumer. We wanted to create an infrastructure that gave a consolidated view of the customers so that we can communicate more effectively with them. This would also ensure we deliver a value proposition to the pharmacies so they benefit from being part of the group. That value proposition includes driving customers into the pharmacies through campaigns which are highly relevant and compelling to loyalty programme members.”



Loyal to the end

One of Green Cross Health’s key marketing initiatives is its loyalty programmes, which collectively have attracted hundreds of thousands of members across New Zealand. Each Green Cross Health pharmacy has its own set of individual programmes – some particular to the brand they came under, for example the Life Pharmacy programme, and some unique to their own store.

“Even though we could see those local programme customers centrally,” said Hooper, “there was no way to bring it all together. The CRM project created a framework by which Green Cross Health could unite the data in one place, while still respecting ownership of the record to a specific chain or pharmacy. By having the data in one place, when a staff member from a store says ‘I want to send a message out to everyone who’s bought Optifast in the last six months’ it can be run through the CRM to generate a list, then an email is sent out to those customers through CheetahMail.”

Partners in progress

Project Manager Hooper enjoyed working with Koorb and their enthusiastic Dynamics CRM team. "Koorb was capable and competent and everything that a provider should be," said Hooper at the end of her contract period. "They're an organisation with very high standards and I was impressed. As a partner they have very good processes, are very professional. I like the guys at Koorb, they're really good people. I'd work with them again."

"The support we received from Koorb after implementation has been impressive," added Smit. "From additional training to system enhancements I've found them to be responsive and friendly. They have gone above and beyond to ensure a positive experience of the software and that business improvements as envisioned were realised."



The plan for 2014

A major next-step in 2014 sees the integration of Green Cross Health's websites with Dynamics CRM and a much enhanced self-service option. Customers will be able to redeem their rewards vouchers against website purchases, view vouchers and accumulated points, see their previous purchase history, and update their delivery addresses.

Mobility is also on the horizon, as well as opportunity management for business development.

A progressive solution

Hooper sees Dynamics CRM as providing a solid yet scalable base from which Green Cross Health can progress. "Green Cross Health now have a very powerful tool that creates a lot more visibility and accountability. From here, it's about taking the data and making ever better use of it as a communications platform, in whichever direction is chosen. Green Cross Health now have the foundation for building a deeper level of customer engagement, all the building blocks are lined up."

The new CRM is part of a vision, supporting Green Cross Health and its member pharmacies as they grow their market share through cultivating exceptional customer loyalty. "The good thing about the CRM implementation," said Hooper, "is that it's the first step towards this destination, not the last."

About Koorb Consulting

Koorb Consulting a 100% New Zealand company, privately owned and operated by the Directors, Nicholas Birch and Paul McDowell-Hook. Both Directors work in the company.

The company was established over 14 years ago and has offices in Auckland, Wellington, Christchurch and Dunedin.

The main focus of our business is implementing and supporting Microsoft Dynamics AX (Gold Partner), Microsoft Dynamics CRM (Gold Partner), Microsoft Business Intelligence (BI) Solutions (Gold Partner) and Microsoft SharePoint (Silver Partner). With a

team of 60 certified and experienced consultants this makes us the largest practice of our kind in New Zealand.

Our customers can have full confidence in our wide-ranging expertise and proven solution delivery. We have implemented and are supporting over 60% of all Dynamics AX customers in New Zealand. We also support customers in Australia, the Americas, Europe and Asia.

Our success is a direct reflection of our strong leadership, highly experienced people and proven methodologies.

Microsoft Partner

Gold Enterprise Resource Planning
Gold Customer Relationship Management
Gold Business Intelligence
Silver Collaboration and Content



For more information about our products and solutions, please contact:

Dalia Raphael
Microsoft Dynamics
CRM Manager

Mb: +64 29 970 3806
Ph: +64 9 361 1304
E: draphael@koorb.co.nz



KOORB
CONSULTING

AUCKLAND • WELLINGTON • CHRISTCHURCH • DUNEDIN

www.koorb.co.nz