

A large orange semi-circle is positioned on the left side of the page. It is connected to the left edge by three horizontal lines: an orange line at the top, a cyan line in the middle, and a lime green line at the bottom. A vertical lime green line extends downwards from the bottom of the semi-circle.

Case Study  
**NHS IQ**

## Cloud-based Microsoft® SharePoint Online rapidly delivers a user-friendly platform for Scheduling and Document Management at NHS Improving Quality.

Established on 1 April 2013, NHS Improving Quality (NHS IQ) is the driving force for improvement across the NHS in England. They are working to improve health outcomes for people by providing improvement and change expertise. Hosted by NHS England, the team has created an improvement organisation that is in alignment with the needs and challenges of the NHS.

## The issue

The CCG and Primary Care Capacity and Capability Programmes Department at NHS IQ needed a reliable tool for managing their data and documents that was user-friendly and could grow as the departments requirements matured. Their existing cloud-based Microsoft® SharePoint Online environment (part of the Microsoft® Office 365 suite) had evolved organically without steer and direction. It was in desperate need of some expert advice to re-shape it into a functioning, effective tool for the department. Additionally their CRM and scheduling capabilities used spreadsheets where inconsistent data was affecting the accuracy of monthly reporting.

With staff struggling to find the content they required and unsure they were using the most up-to-date information, the team knew that a new tool set was required to improve working standards and efficiency. Their existing system was cumbersome and heavily controlled by proto-calls and rules making it difficult to use and stressful for staff. They had previously used Oracle CRM but found it to be too complex for their needs as it required too much initial outlay of time and resources.

## The solution

The team searched for the UK's leading Microsoft® SharePoint consultancies and invited them to tender for the project. From this tender process, CPS was chosen as the partner of choice to quickly deliver the solution NHS ID wanted.

Mani Dhesi, Senior Associate – Head of Planning & Delivery explains;

*'CPS stood out as the clear leaders within the Microsoft® SharePoint market place due to their extensive experience and expertise. They really recognised and understood our requirements and helped us to think a little differently and outside the box in terms of what we wanted the solution to do for us. Reviewing the many Proof of Concepts that CPS has rolled out to other organisations was all we needed to convince us to proceed immediately.'*

From budget sign off to delivery took the CPS team less than a month meeting the rapid delivery requirement outlined in the tender document. The initial discovery process delved into the department's requirements and really helped the team understand what their existing instance of Microsoft® SharePoint Online could do for them.

Working in partnership with CPS, NHS IQ took a staged approach to the implementation, building and testing one piece of functionality at a time until the complete solution was ready to go live. The CPS consultants worked onsite and alongside the NHS IQ team sharing knowledge so that they would be self-sufficient once the system roll-out was complete.

## What was delivered

### A new Homepage

This was the entry page into the online tool set at NHS IQ. Staff were struggling to find content so CPS introduced iconography and colour to differentiate between the types of content, the navigation was simplified and Search was made prominent.



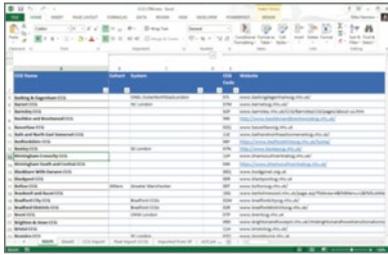
Original homepage



New homepage

### Customer Relationship Management (CRM)

This was originally managed within an Excel spreadsheet which had evolved as process and team size grew. With multiple people editing at any one time, the data entry was inconsistent making reporting inaccurate. CPS converted the data into SharePoint lists with an improved User Interface (UI) to allow for easy, consistent and controlled data entry and live, up-to-date reporting.



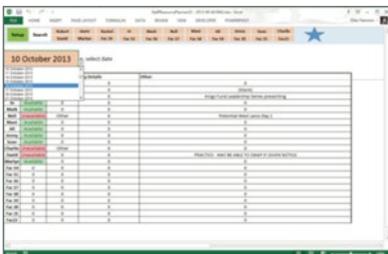
Original CRM working environment



New Microsoft® SharePoint Online CRM working environment

### Scheduler

This was originally managed within an Excel spreadsheet but was converted to SharePoint lists with improved UI and custom filters to encourage usage and aid search functionality.



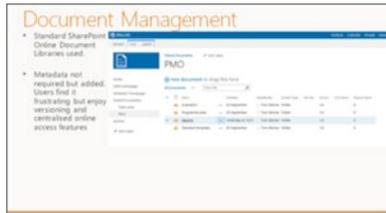
Original Scheduler



New scheduler

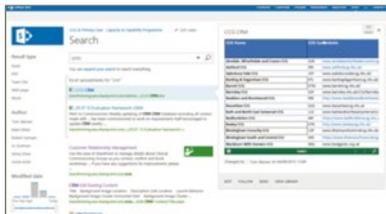
### Document Management

Within Microsoft® SharePoint Online the introduction of versioning and centralised online access greatly improved the speed of access and ensured the most up-to-date information was used.



### Search

The search functionality of Microsoft® Office 365 was implemented to deliver fast, relevant search results so that the team could quickly find what they were looking for:



### Two Factor Authentication with support for Blackberry devices

This was implemented to maintain the highest levels of data security whilst allowing staff to work remotely.



### The Benefits

Mani comments;

*'The openness and professionalism of the CPS consultants was really impressive and greatly assisted the smooth implementation of the project. We never felt that any question was too simple or stupid to ask! The speed of delivery was beyond our expectations and when we put in change requests the response was excellent.'*

*'In terms of the new system, we've had outstanding, positive user adoption, they're really asking all the right questions now. It's worked because the online access makes it easy for everyone. The user friendly front end has really opened up the system and made it a simple, straight forward place for our staff to work. We can now get the information quickly without having to worry if it's the correct version or most up-to-date data. With the complicated rules removed, it's very easy to use and navigate around.'*

### What's next?

The solution has proved so successful it is being considered for use in other departments.



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