

Hanley Consulting

Driving primary healthcare improvements using Zoho One

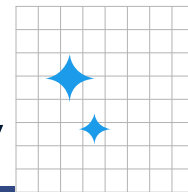


[zoho.com](https://www.zoho.com)



The Company

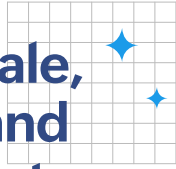
Improving Health And Care Through Technology



Hanley Consulting, based in Hertfordshire, UK, is a specialist provider of digital solutions for the primary care sector. "The mission is to enable healthcare organisations to deliver better care through more efficient use of their tools," says Max Gattlin, Hanley Consulting's Digital Consultant. Working with institutions across each tier of the NHS - from individual GP surgeries to ICBs (integrated care boards) - the health-tech firm improves patient and employee experience, communication, appointment access and operational efficiency through the use of superior technology. It achieves this by providing and deploying cloud telephony, online consultation tools, website development, surveys, apps and more.



**We work at scale,
reduce cost, and
improve impact.**



Sharon Hanley

Managing Director
(and Max's proud mum)

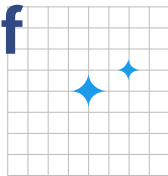
Comprised of six in-house consultants, the Hanley Consulting team is small and tight-knit, but it has big ambitions. "There are six and a half thousand GP practices in the country. We want to work with every single one of them," says Max. So we headed to Hanley HQ to discover how the Zoho One software suite has this go-getting team on track to deliver transformative tech on an NHS-wide scale.

The Challenge

Equip a resource-stricken team with efficient digital tools



I quickly realised
**there was some
inefficient and
clunky use of
technology.**



Max Gattlin

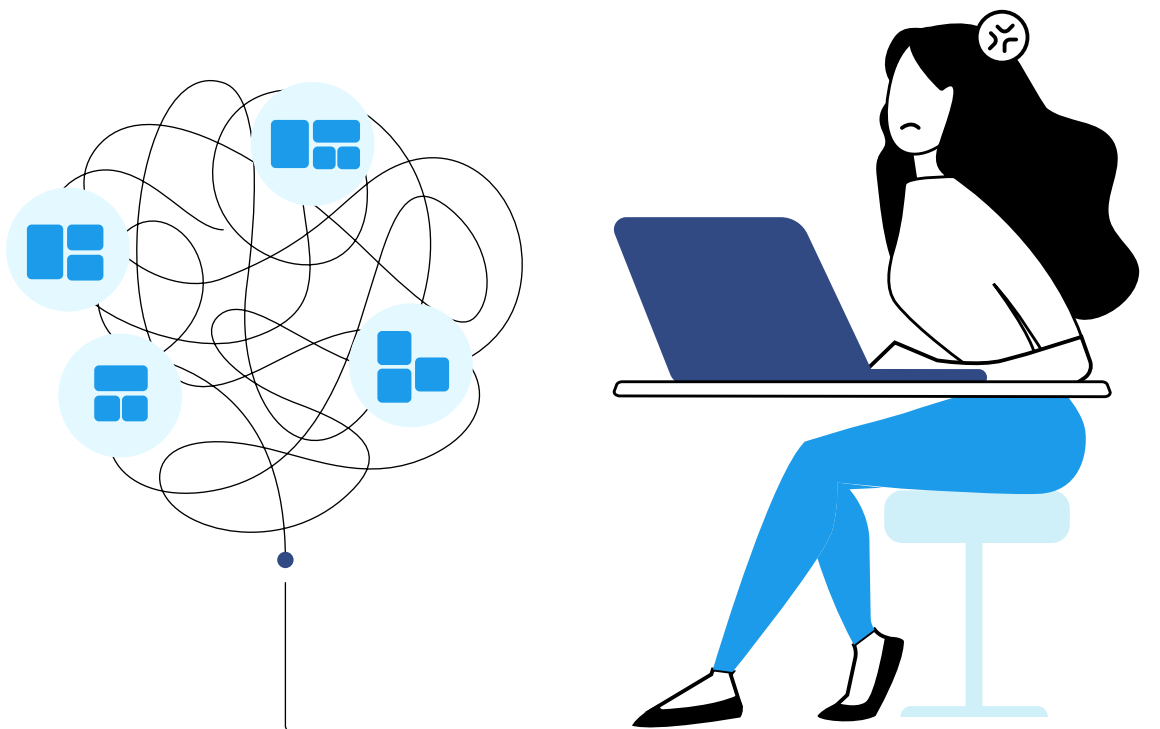
Digital Consultant, Hanley Consulting

With more than 20 years of primary care experience under her belt, Sharon Hanley knew first-hand the tech problems faced by the NHS. She established Hanley Consulting in 2009 with a vision to improve and streamline its digital capabilities, aiming to free up more time for clinicians to deliver care to patients. But when the COVID pandemic struck in 2020, Sharon was under pressure to roll out vaccination booking platforms at speed. She enlisted her son, Max, who boasts a background in tech startups, to help her meet the deployment targets.

Despite his hasty initiation, this merging of skills proved to be an ongoing recipe for success - except for one obstacle. Max found that Hanley Consulting's tech stack was comprised of disparate software systems from multiple vendors. The roll call included Hootsuite for social media management, Slack for instant messaging, SurveyMonkey for surveys, Mailerlite for email campaigns and Trello for project management.

The resulting data silos, duplicated processes and inefficiencies troubled Max. Most processes necessitated a lot of exporting and importing of data between platforms and it was difficult for him to get an overall picture of the company's performance and projections. Max resolved to practise what he preached and improve Hanley Consulting's own tech by bringing harmony to its software stack.

By chance, Max was working with a private healthcare client that was using Zoho CRM and granted him third-party access to its account. "I really liked how intuitive it was", explains Max, who was so impressed that he arranged a discovery call with a Zoho representative. "In that conversation, I listed out certain things like SurveyMonkey, and I was told that Zoho Surveys comes with Zoho One. I also mentioned that we were communicating via Slack and he mentioned the Cliq messaging service within Zoho One. It became apparent that the Zoho One suite could cover all of the tools that we were paying for ... with the added benefit of integration. It was a no-brainer."



The Solution

An inclusive suite of software boosts the health of Hanley's tech



Zoho CRM is central to our daily operations as a company



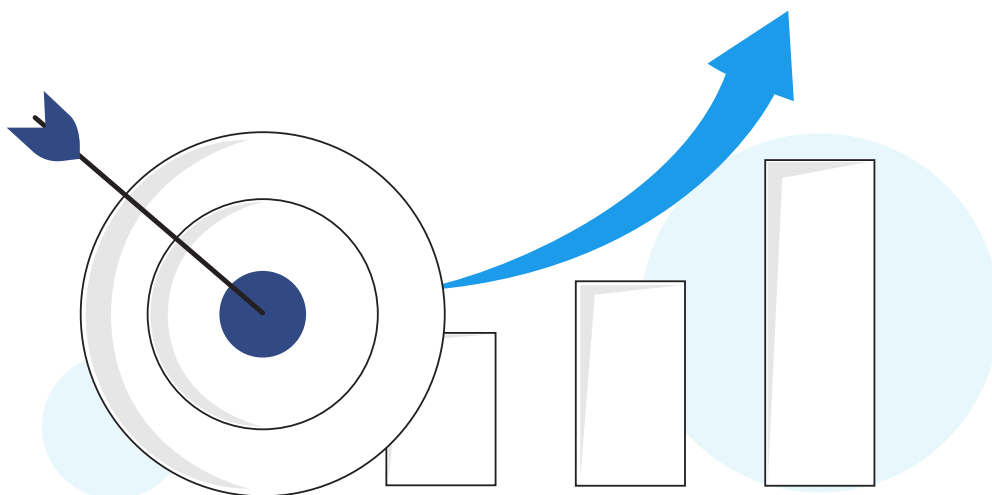
Max Gattlin - Digital Consultant, Hanley Consulting

Max's first priority was to centralise and organise all of Hanley Consulting's client information inside Zoho CRM, from where further platforms could be integrated over time to suit the firm's activities and goals. The end result needed to be a collection of connected apps that were highly customised to suit the primary care sector and its challenges.

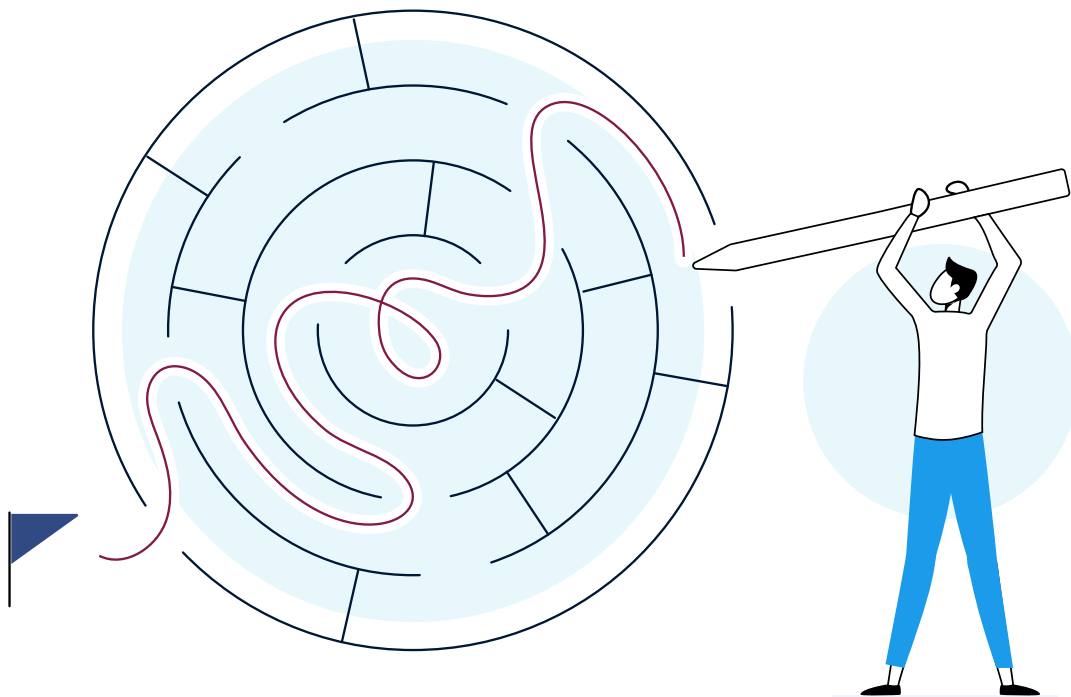
A specific consideration during the CRM build centred around how to represent the tiered structure of the NHS within which Hanley Consulting's clients sit, and how to link related records. "Practices can sit within PCNs (primary care networks), and the PCNs can sit within the federations and so on", explains Max. To capture these relationships accurately, the team utilised Zoho CRM's parent and child fields to connect all of the related NHS organisations that they work with. Alongside this, a bespoke "patient population" field calculates the number of patients belonging to each account and its sub-accounts. "Patient population is huge in primary care. If a general practice has 10,000 patients, and there are five of those practices within that PCN, the PCN field is auto-populated with a 50,000 patient list size," says Max. This combination of CRM fields gives Hanley a comprehensive view of the potential reach, impact and influence of any tech solution that they roll out to an NHS organisation.

Another feature of Zoho CRM that has been crucial for the health-tech firm is its unique identifier fields. "In the NHS, every organisation has an ODS (organisation data service) code, and we've set that as an identifier so we can map any data from other apps like Zoho Forms and populate fields based on the code ... we configure it so that it's added to that one specific organisation", describes Max. Going further, the team have also customised CRM's account records to hold Patient Online Management Information (POMI) and survey results. "We've embedded the ability to capture POMI data as well as GP patient survey data straight back into the CRM. We can group it and that helps us target and better support our clients," enthuses Max.

Hanley Consulting also uses Zoho CRM to manage its sales pipeline. Max nods to his "ten-part process for sales, going from new lead right through to closed won or closed lost." He explains "We have a percentage probability at each stage and also the estimated revenue so we can have a forecast to support us with our financial planning." Displaying all of their deals in the kanban view helps the team understand their open opportunities at a glance, allowing them to focus resources on those that are a priority.



As a consultancy firm, Hanley Consulting works closely not just with NHS clients, but with third-party contractors. Zoho CRM's role-based access controls are instrumental in allowing third parties to view and modify selected elements of the firm's CRM system without detriment to data security. "We have an outside contractor that manages all of our social media ... she can come in and do her work in a siloed manner and doesn't have access to all of our other data," says Max. "I'm completely confident when allocating CRM access ... you can go so granular to close off modules," he adds. For a self-labelled "resource-stricken" team, these extensive access controls help to deliver much-needed collaboration and interaction across and inside Zoho CRM.



Zoho Survey



We surveyed around
300,000 patients and
**we had a
brilliant
response rate.**



Ellyn Gattlin

Patient Engagement Lead, Hanley Consulting

Hanley Consulting offers its primary care clients a range of staff and patient engagement surveys. Communicating on behalf of a practice, PCN, federation or ICB, Hanley Consulting quizzes patients about the care they're being provided, the technology being used, access to appointments and the overall experience they receive. They also survey NHS employees to gauge job satisfaction, often before and after new software has been implemented to measure its impact.

Upon adopting the Zoho One software suite, Hanley Consulting's team spotted an opportunity to move from SurveyMonkey, which was costing them over £1,100 per year, to Zoho Surveys. As an included app in Zoho One's operating system for business, Zoho Surveys integrates seamlessly with CRM without any additional costs, a major boon for Hanley Consulting. The transfer of data from SurveyMonkey was simple and fast, with Ellyn saying "We haven't lost anything, and for us, that's made a huge difference."

In 2022, Ellyn used Zoho Surveys to survey around 300,000 patients about appointment access on behalf of seven separate PCNs in the Buckinghamshire area, achieving a healthy response.

"It's difficult in healthcare to get feedback ... we see around 10% as a good response rate, and we reached 16%", says Ellyn. She attributes this to Survey's user-friendly, intuitive front-end and the ability to white label each survey to match the organisation's branding. "It's brilliant because you can brand it, which is particularly important with the NHS, we need that for trust. People need to know it's coming from their practice," she adds.



From a user perspective, Ellyn applauds Survey's simple drag-and-drop survey builder, its wide range of question types and its complex logic capabilities. "We have many different opinions coming through when it comes to someone's healthcare. We can build one survey but make sure that we're interacting with those that perhaps aren't as happy as others ... leading to the correct questions based on their answers to previous questions," Ellyn explains. And once a survey is closed, she has access to extensive reports and analytics so that she can dive deep into staff and patient feedback. "It's really easy to filter on whatever demographic or practice that you might want to delve into ... you can also compare results over time. The time data comparison isn't something we would have been able to do in SurveyMonkey."

One of Hanley Consulting's key goals is to provide primary care organisations with measurable insights that drive improvements, with both quantitative and qualitative data. Zoho Surveys has allowed the firm to capture exactly this data. "It allows PCN network managers and practice managers to make better data-led decisions, tying up with our overall mission to improve healthcare through technology", confirms Ellyn.

Zoho Projects & Sprints



**Projects is one
of the main tools**
we use.



Paul Harvey

Governance and Operations Manager, Hanley Consulting

Responsible for heading up Hanley Consulting's operations, Paul Harvey can face many hundreds of to-do items at any one time. So he credits Zoho Projects with helping him keep a handle on his tasks, organising his days and prioritising his workload. "We found it really improves the way we operate as a business," he says. Before adopting Projects as part of the Zoho One bundle, Paul reveals that the health-tech firm's approach was "Scattergun. People didn't always know what they were supposed to be doing."

Now used internally to track all of the tasks related to client projects, the team have automated many aspects of Project's functionality. For instance, newly onboarded CRM clients trigger a new project creation and an automated script names it after that client. The project is also auto-populated with a set task list and all of the team members that need to collaborate on the job are assigned. Not only do these automations streamline the onboarding process, but they also maintain consistency generally across Zoho and inside the Projects application. Alongside other features, like live dashboards and priority filtering, Projects ensures "that everything's delivered on time and that nothing's missed," adds Paul.



In conjunction with Zoho Projects, Hanley Consulting leverages Zoho Sprints to manage and deploy new product releases and updates, especially to its hero product, EDATT. An acronym for "Enabling Digital Access Through Telephony," the application is positioned as the number one automated assistant for general practice. Crafting an industry-leading product such as EDATT takes much testing and refinement, and that's where Hanley Consulting found value in Zoho Sprints.

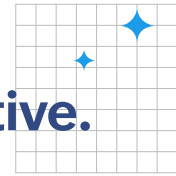
"When we released a new product we found a need to be more agile with tasks," explains Ellyn. Sprint's scrum backlog lets the team record any ideas for product development, change requests or even bug fixes in a platform where progress can be easily monitored and tracked. As a result, the firm makes Sprints the focus of its weekly meetings, discussing the backlog and then scheduling items into upcoming sprints for Paul to action. "I found that Sprints has made it a lot easier to prioritise the different changes to a product. Before, using an Excel document, it was hard to see what needed to be done on what date," recalls Paul.

Highly integrated with Projects, Sprints also notifies anyone who's tagged in a particular task whenever Paul makes a change, via the Projects bot. Asked about the lasting impact of Zoho's project management platforms, Ellyn exclaims: "Importantly, you're not getting nagged by everyone saying "when's this going to be done?"" , with Paul replying; "Yeah, that's made a big difference to my life!"

SalesIQ



SalesIQ is so easy to use and intuitive.



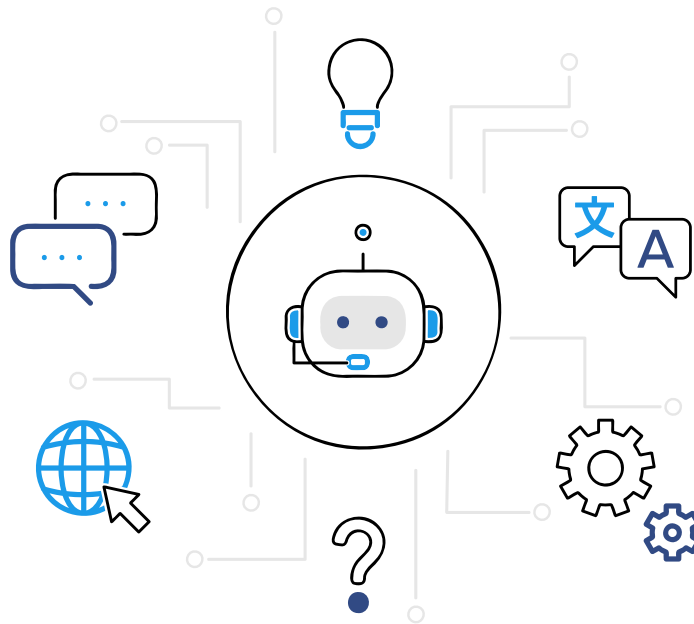
Max Gattlin - Digital Consultant, Hanley Consulting

Another key Zoho One application in Hanley Consulting's toolbox is SalesIQ. It's hosted on the businesses' website as a conversational chatbot and is available around the clock. It greets new and returning customers, guides them around the site and can reveal tailored articles from Hanley Consulting's extensive knowledge base. These automated functions are completely hands-off for the team, allowing their audience to self-serve at any time, from anywhere. "If a clinician or a receptionist from a general practice team needed some support in how to navigate their clinical system like EMIS, we can create a knowledge base using SalesIQ for that user to get the knowledge they need," says Max.

If SalesIQ's pre-configured questions and replies don't resolve a visitor's query, the Hanley consulting team have the opportunity to interject and take forward the conversation manually. There's also the functionality to hand off a conversation to a colleague with more specialised knowledge if required. What's useful for every member of the team during these conversations is visibility of the user's website journey so far. "On the right-hand side I have a user pathway ... so if they've spent time on a particular service page, I can tailor my pitch to that particular service," explains Max. If a user hits a roadblock when Hanley Consultant's agents are unavailable, the team have integrated SalesIQ with Zoho Desk to raise an escalation ticket that can be actioned at the next earliest opportunity.

Zoho Desk is not the only app that Max has plugged into SalesIQ. Zoho Analytics offers real-time insights on the platform's usage and performance, with Max able to track the numbers of new versus returning users, dwell times on individual webpages and more. "We've got a heatmap on the Analytics dashboard which shows the most common times that patients are interacting with our chatbot," he explains. A further integration has enhanced SalesIQ's front-end offering to Hanley Consulting's web traffic, this time with the Google Translate API.

Visitors can ask questions in one of up to 100 different languages, which are then translated into English for Hanley Consulting's team to understand. In turn, their English responses are automatically converted back to the recipient's language.



Hanley's health-tech highlights

It's clear that transitioning to the Zoho One suite of business applications has helped Hanley Consulting directly and indirectly achieve its mission statement of improving healthcare through technology. "It's absolutely transformed our business," confirms Max. So here's a recap of the primary care problem-solvers' achievements with Zoho:

- A streamlined client journey inside Zoho CRM.
- Improved patient and employee response rates using Zoho Survey.
- Client project completions with greater efficiency using Zoho Projects.
- Continuous improvement of its products enabled via Zoho Sprints.
- Supporting customers in 100 different languages, 24 hours a day, leveraging Zoho SalesIQ.
- A tightly integrated tech stack that negates the need for downloading and uploading data between platforms.
- Significant cost savings against separate SaaS subscriptions, Hootsuite, SurveyMonkey and Slack. "By consolidating..we've been able to do it cheaper", says Max.

Now that's what we call a healthy operation!

About Zoho One:



Developed as the ultimate "operating system for business", the Zoho One bundle is a collection of 45+ integrated applications that cater to every diverse need of a modern business. From Sales to Marketing, Customer Support, HR, Operations, Finance and Legal, Zoho One's powerful suite of tools can be relied upon by every department to improve performance, enhance collaboration and streamline processes. An unrivalled yet affordable solution, Zoho One's cloud-based apps bring extraordinary value to any organisation.

Please find out more via our website: <https://www.zoho.com/one/>





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Zoho One



Zoho CRM



Zoho Forms



Zoho SalesIQ



Zoho Analytics



Zoho Projects



Zoho Marketing
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Zoho Survey



Zoho Sprints

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