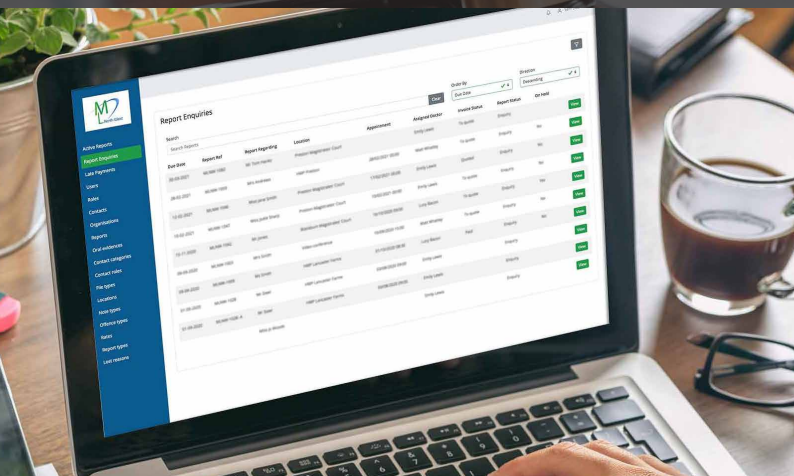


CRM & Workflow System

Medico Legal North West

Managing the sales and service delivery process to support the growth ambitions of the business.



The Customer

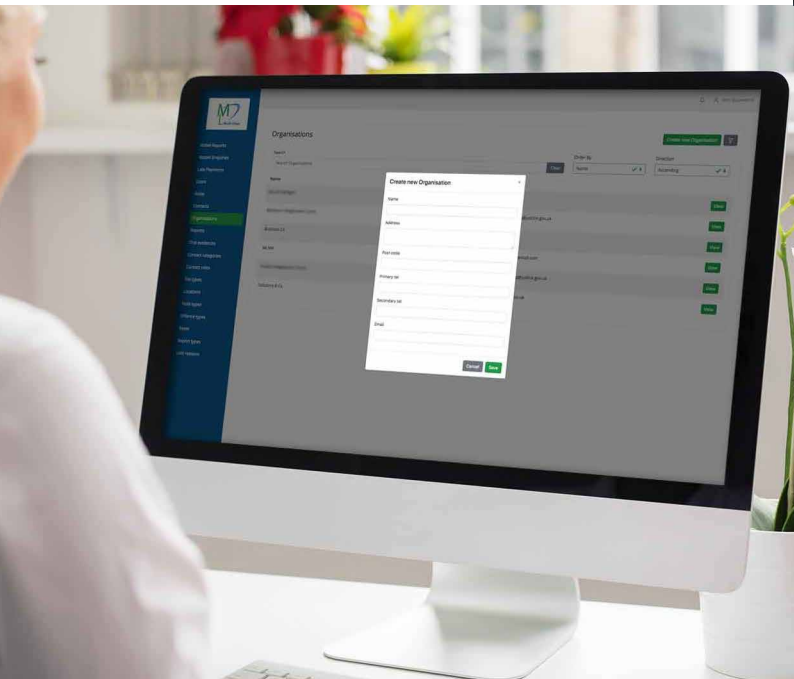
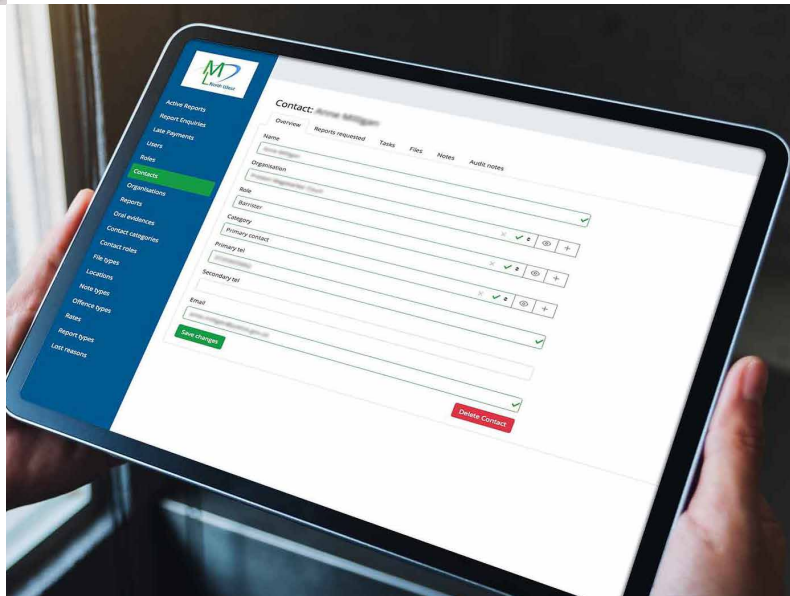
Medico-Legal North West Chambers (MLNW) provides independent psychiatric and psychological experts to a wide range of solicitors, barristers and courts throughout the UK.

Their expertise extends across criminal, mental health and mental capacity, family, civil and employment domains.

Their Pain

The key pain points in the MLNW process focused on efficiently dealing with new enquiries, assigning work to the right consultants and then tracking progress through to completion. The process was further complicated by the disparate nature of the expert consultants.

MLNW needed a centralised location of business data including client information, new business enquiries and contact details of medical professionals. They then needed automated workflows to manage service delivery with minimal human intervention.



Our Solution

The first step was to map their process to visualise the flow of work through the business. From this we identified the necessary steps in the service delivery process and opportunities for automation.

We then configured our Flight platform to deliver bespoke CRM and Workflow software to solve MLNW's key pain points and open up opportunities for growth.

It was important the software was easy to use and provided global visibility of business performance for management while at the same time automating the different steps in the process to move jobs along with minimal human intervention.

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Key Features



Core CRM functionality, including the storage and management of key business data



Full project management to track job progress and information



Task management system to ensure work is completed in a timely manner



Centralised, secure file storage with full GDPR compliance



Automated reminders to ensure deadlines are not missed



User hierarchy to provide access to specific information



Ability to set a schedule for consultants so they are not assigned work they cannot do



Reminders / notifications / triggers to ensure actions are taken to move the process along



Full audit trail to track the job from start to finish



Impact

"The introduction of CRM & Workflow software has been hugely beneficial and given us the visibility we needed. It has helped us to grow and bring on new consultants without the additional administration costs that would normally come with it.

Blue Wren understood our pain points and worked with us to deliver software that matched our requirements. They continue to provide ongoing enhancement and improvement of the system which is very valuable"

– Dr Appleyard, MLNW

Improve your productivity with Flight CRM & Workflow Management Software

Get in touch or book a free demo

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blue wren

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