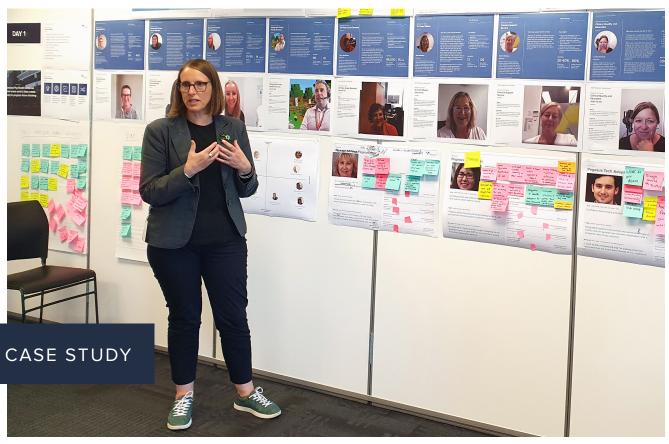# Guiding insights: Assurity helps Pegasus Health clarify customer journeys ahead of CRM rollout



**CASE STUDY**

*Bebe Frayle, Manager, Project Management Office at Pegasus Health explaining the customer journey process to her team.*

Recognising the potential for improvement in patient management offered by a modern Customer Relationship Management software system, Canterbury's Pegasus Health started by stepping back and asking itself, 'how can we address the real problems we face as an organisation?' Faced with some challenging questions, they engaged the Assurity Consulting Design & Innovation team for a design thinking project. The resulting outcome produced a sound business case for the CRM system and the delivery of a document that remains a reference point in the organisation's customer relationship strategy two years later.

Pegasus Health is a charitable organisation committed to improving the health outcomes for the people of Canterbury through innovation in service design and delivery, collaboration with partners and continuous improvement. Pegasus Health supports General Practices and community-based health providers within Canterbury to deliver quality health care to more than 445,000 enrolled patients.

*The team from Pegasus Health receiving an overview of customer insights captured during the workshop.*

## Situation

Bebe Frayle, who heads the Pegasus Health Project Management Office, says that as the organisation kicked off a 'Know Your Customer' project for improved customer service, it realised there were multiple perspectives on just who the customer was. "This was in the context of preparing our business for introducing a CRM system, something our teams had identified a need for. While we arrived at a technical problem which we could address with software in terms of multiple data sources, we recognised there are multiple ways of understanding customers depending on who within the business is engaging with them. And we realised that before implementing software, we should do a deep dive into our teams and better understand who they interact with, what their day looks like, and what they need."

In other words, says Frayle, Pegasus Health wanted certainty that its CRM system would be appropriately configured with the right business processes.

**"Unless you fully understand what the software should be doing, there is a risk of an incorrect deployment."**

Since enterprise software deployments are costly, time-consuming and disruptive, Frayle says Pegasus sought external support.

## Solution

Having worked with Assurity Consulting before, Frayle knew where to look for the assistance Pegasus Health required. "They were top-notch, so I invited them to apply on an RFP. With Assurity's direct and assertive way of working clear in its response, it was no surprise when they won the tender."

The project commenced with a kick-off meeting collecting all necessary knowledge guiding project direction and establishing desired outcomes. Assurity rapidly identified nine teams (Integrated Family Health Services, Community Liaison, Suicide Prevention, Primary Mental Health, Nursing, Practice Support Services, Clinical Quality & Education, 24-hour Acute Demand, and Te Tumu Waiora), then conducted hour-long in-depth 'empathy interviews' with individuals from those teams.

After extracting insights, key themes were identified which inform and influence customer relationships at Pegasus Health, including making information open with the option for confidentiality, sharing information across teams where appropriate in support of optimal decision-making, identifying and eliminating points of failure, support for continuous service improvement, reducing complexity, and supporting a drive towards better healthcare. In generating a Customer Experience Map, some 50 ideas were collected from the respondents demonstrating a requirement for a Self-Service portal for customers (patients) and an external customer dashboard for staff use. Frayle said of the research, "The outputs were as expected; what was surprising was the extent to which everyone was experiencing similar problems. The uniformity of responses confirmed we did indeed require a CRM system, but it also showed we needed something in addition to that."

assurity

Pegasus
partners in health
kia atawhai ki te tangata

*Deep dive into the insights captured.*

## Results

One of the direct results of Assurity's work is the 'something in addition', confirms Frayle. "In our discussions of other potential tools, we realised the necessity for a case management system, which we are in the process of rolling out," she notes. "Before Assurity's involvement, this wasn't even on the radar."

There's a broader context in terms of the value delivered by the consultants; in addition to preparing the ground for the eventual CRM system, it has helped align the internal voice so everyone who is to use the software has been heard, resulting in a stronger internal team experience. Processes have been exposed and streamlined, and a strategy designed around the desired customer experience. Assurity has also, through the process of delivering insights into the expectations of various team members, sought to integrate design thinking while creating a project roadmap guiding the delivery of the CRM system.

She adds that the report delivered to Pegasus Health has become a lasting asset. "It is an exceptional reference to which we still look 18 months after the project concluded. I refer to it at least once a week as a source of guidance and insight for the CRM system we're working on and the case management software. It's an incredibly insightful deep dive into our pain points."

She has no hesitation in recommending Assurity Consulting.

"They traversed a vast amount of ground that we could not, and they did it fast, powering through something we had tried to do for years. That's why you look to experts – for their expertise," Frayle concludes.

"Assurity uncovered a lot that we didn't know, which is insightful. As an 'external', they had conversations which would have been impossible; our people were frank with them, and the workshops proved invaluable in getting to the heart of what we do,"



**Bebe Frayle** – Manager, Project Management Office, Pegasus Health

*Bebe and her colleagues at the end of the 'Know Your Customers: Discovery' workshop*

# At a glance

**Company:**
Pegasus Health

**Industry:**
Healthcare

**Requirements:**

Before implementing a CRM system, the team at Pegasus recognised there were multiple perspectives on who their customers were and that there were numerous ways of understanding customers depending on who within the business was engaging with them.

Pegasus also appreciated the importance of getting clarity about customers across the whole organisation before implementing the CRM system.

Pegasus Health launched a 'Request for Proposal' for their 'Know Your Customer: Discovery Phase'. The Assurity Design & Innovation team won the RFP.

**Solution:**

Assurity rapidly identified nine teams (Integrated Family Health Services, Community Liaison, Suicide Prevention, Primary Mental Health, Nursing, Practice Support Services, Clinical Quality & Education, 24-hour Acute Demand, and Te Tumu Waiora), then conducted hour-long in-depth 'empathy interviews' with team representatives.

After extracting insights, key themes that inform and influence customer relationships at Pegasus Health were identified, including:

- making information accessible and shareable across teams to support optimal decision-making

- identifying and eliminating points of failure

- support for continuous service improvement

- reducing complexity

- supporting a drive towards better healthcare.

**Outcomes Achieved:**

- Customer Experience Map and Ideation

- Collection of more than 50 ideas from respondents

- The requirements for a Self-Service portal for customers (patients), external customer dashboard for staff use, and a case management system were uncovered during the 'Discovery' workshops.

- Alignment of internal stakeholders' voices

- Delivery of a report is still referred to and used 18 months after project conclusion.