



# Allocate

To enable seamless customer experiences from lead to after-sales, Allocate embarked on a global alignment of business processes and roll-out of best practices. To underpin its transformation, the company enlisted makepositive to deploy a Salesforce-based platform, enabling a single view of the customer and consistent approach across multiple geographies.

## Challenge

Allocate, a software provider to the healthcare sector, has expanded fast—both organically and via acquisition. With limited organisation-wide insight into customer service, the company was missing opportunities to optimise performance and streamline sales cycles.

## Solution

By engaging makepositive to implement a Salesforce-based platform, Allocate eliminated data silos and standardised processes, enabling exceptional customer relationship management (CRM).

## Benefits

- Boosted accuracy and quality of customer data, enhancing management reporting
- Unlocked visibility of customer data, driving improvements to service
- Increased insight into business performance, supporting better strategic decision-making
- Enabled smoother customer experiences, helping to inspire ongoing loyalty

## The challenge

More than 800,000 people working at 800 healthcare organisations in 11 countries use Allocate software. To build this global reach, Allocate has extended its operations beyond its home region of the UK, through a combination of organic growth and acquisition.

As Allocate expanded, it added new processes and data silos. To overcome this complexity, the company initiated a programme to unite data and introduce best practices across the organisation.

Alan Ince, Director of Strategic Programmes at Allocate, explains: “We’re passionate about helping our customers deliver the best care, which means continually optimising our service to them.

“We realised that a lack of standardisation and ability to oversee global operations was holding us back from offering truly seamless customer experiences, and set out to change that.”

Allocate targeted a transformation of every interaction with its customers, from lead generation to post-sales accounting. As part of this programme, it began looking for the right platform and partner to enable a fresh approach to CRM across its global operations.

## The makepositive solution

To bring together customer data in a single place and define new sales processes, Allocate engaged makepositive to implement a cloud-based platform based on Salesforce.

“On evaluating CRM offerings, we judged Salesforce to be best-in-market,” recalls Alan Ince. “Choosing a cloud-based option over an on-premises deployment was a no-brainer, as it allows us to avoid the administrative overhead of managing infrastructure. Next, we looked for an implementation partner with the specialist skills to help us achieve a smooth transition to our new ways of working—and makepositive fit the bill.”

makepositive worked with Allocate to define requirements, put together a solution design, build the platform, test it thoroughly and roll it out into production. When Allocate adjusted its requirements, makepositive rose to the occasion, finetuning the platform to align with new goals.

“The makepositive team includes some outstanding resources, with members who really know their stuff,” comments Alan Ince. “They went above and beyond in supporting us, joining calls to resolve testing issues at very short notice and providing hands-on training when we needed it. Best of all, makepositive were responsive when we requested changes and took feedback onboard very well.”

Allocate called on makepositive to assist with change management too, a move that proved very successful. Alan Ince adds: “It’s clear that makepositive don’t just deal with system issues—they helped just as much with user adoption.”

---

**“The makepositive team includes some outstanding resources, with members who really know their stuff.”**

**Alan Ince, Director of Strategic Programmes, Allocate**

---

## The benefits

Employees across Allocate now have access to accurate, comprehensive customer information and standardised processes. As a result, the company can implement organisation-wide improvements.

“Working with makepositive to roll out Salesforce gives us a single view of the customer, no matter where you are in Allocate,” explains Alan Ince. “We have succeeded in reducing complexity across the organisation, streamlining processes and embracing consistently high standards.”

Allocate can use more powerful reporting capabilities to identify opportunities to enhance business performance. “For the first time, we have an overview of our global sales operations, which we can use to drive business outcomes to new heights.”

Crucially, the project gives Allocate the tools to iron out any blips in the sales process, helping to ensure that customers come back time after time. Alan Ince concludes: “We put the customer at the heart of everything that we do. Teaming up with makepositive is helping us to enable superb experiences each and every time that we interact with a customer.

## About Allocate

Allocate provides software tools that help healthcare organisations manage their employees safely and efficiently, so that they can focus on delivering exceptional care to patients. Headquartered in London, UK, Allocate has regional offices in the UK, Spain, Australia and the Nordics. For more information, visit <https://allocatesoftware.com>



## About makepositive

makepositive is a multi-award-winning Platinum Salesforce consulting partner with more than 1,200 successful project deliveries to date. With over 160 Salesforce experts, makepositive has experience across the entire Salesforce platform, including Sales Cloud, Service Cloud, Community Cloud, Platform, Marketing Cloud, Field Service Lightning, Quote to Cash, Pardot and Einstein Analytics. The company also has a dedicated Experience Design & Managed Services team. A two-time winner of the Salesforce Partner Award for Innovation, makepositive puts customer success front and centre.

For more information, please visit <https://makepositive.com/>

©2019 makepositive Ltd, Unit 129 Metal Box Factory, 30 Great Guildford Street, London, SE1 0HS