Background

Allocate is a leading provider of complex workforce and risk management software for healthcare and other regulated industries. Unable to measure customer adoption and ROI consistently, we worked with them to adopt a 'maturity score', for both internal and customer use, to track 'customer success' and demonstrate value.

Monitoring success

When we started working with them, Allocate had limited ways of measuring whether customers were using its software properly. More importantly, with Lord Carter's review of operational productivity in NHS hospitals, providers, such as Allocate, were challenged to demonstrate return on investment. The existing way of working did not support this and allow them to understand whether customers deriving benefits, from using the software, for their operations (for example, reduced cost from more efficient rostering by better utilising expensive agency staff).

Working together we helped them develop an 'Adoption & Usage Maturity Score'. This combined 15 operational metrics into one monthly score per customer. An example of this is the eRostering Maturity Index (eRMI), which measures the degree to which eRostering has been rolled out across customer sites, whether it is being used properly to link flexible and substantive resources together, the degree to which patient needs are met, and staff adoption.

Individual scores are communicated to customers on a monthly basis and benchmarks are provided, allowing them to measure relative performance set against that of similar organisations. This also includes independent, third-party research that we have commissioned, quantifying the financial benefits, for customers, of improving eRMI scores.

Adding value

What sets this solution apart is the value it adds to Allocate's customers. As a result NHS customers have embraced the eRMI score concept, and use it to drive internal dialogue, including at Board level. Within Allocate, this scoring system has supported growth in cross- and up-selling of software and development of new software functionality. Significantly, customer success teams at Allocate are now being incentivised on the basis of this score and explicit linkage of eRMI and financial ROI has helped them to drive new customer acquisition.

Health scoring