

## Bayshore Builds Healthy Client, Employee and Referral Relationships with GoldMine® Corporate Edition

As health care costs rise, home health care has emerged as a cost-effective alternative to institutionalization for many individuals by providing compassionate care in the familiar surroundings of home. In a growing number of communities across Canada, Bayshore Home Health is the leading home health services provider. Where government support ends for residents that require home nursing and other living and health-related support, Bayshore provides a host of in-home services.

In business since 1966, Bayshore has grown rapidly to 30 offices and nearly 5,000 employees. It also engages thousands of nurses and caregivers each year to serve clients. On a daily basis, the company must manage relationships with multiple contact groups in each of the communities it serves: employees and contractors; end clients receiving services; and influencers, which are referral sources such as families, doctors, discharge planners and case managers.

Until 2005, the company relied solely on a proprietary system to coordinate client placements and scheduling. However, it needed a more effective way to serve clients, referral sources and employees consistently, and to capture relevant data to execute and measure marketing efforts. "We wanted to build a single database of contacts and influencers for our entire company," said Kevin Webster, Managing Director of Bayshore.

### Creating a Consistent Experience for All Contacts

After considering several applications, the company chose the combination of GoldMine® Corporate Edition from FrontRange Solutions and Concentrix, a FrontRange Solutions partner based in Hamilton, Ontario. The software met the company's key requirements, including ease of use, and the ability to be

deployed over Citrix MetaFrame to give all employees access in real time. Additionally, Bayshore was confident that the team at Concentrix could most effectively match the software with the company's business needs and lead a successful implementation.

Concentrix worked closely with Bayshore to map its needs and current processes. The firm customized GoldMine screens to look different based on the type of contact, which enhances the user experience. To capture all incoming inquiries, the partner developed a custom intranet application so that any Bayshore employees can record an inquiry easily. GM+Views then links the contact to the original inquiry (Web) form.

The form manages an inquiry from point to point, guiding users in capturing the required information in GoldMine. It provides a consistent experience for all callers and ensures that employees collect valuable data to measure and use in marketing campaigns.

"We're working aggressively to create a brand and client experience that's standard across the organization," Webster said. "Providing clients with a similar experience in Edmonton as they have in St. John, New Brunswick requires that we put structure around that. Through the inquiry form, employees start that relationship in a standard manner and make sure that all the pieces of the puzzle are covered."

Concentrix also helped Bayshore create a structured, automated sales process. With steps guided by GoldMine, representatives at each branch office never fail to schedule and follow up with contacts – key aspects of a successful sale.

Concentrix additionally integrated the inquiry and GoldMine applications with the 30 branch legacy systems used to schedule client visits. To coordinate all

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of this, Concentrix brought in KnowledgeSync 2000 from Vineyardsoft Corporation, using the GoldMine API to push and pull data in real time from the inquiry SQL database and the many legacy system databases each day.

KnowledgeSync monitors business applications and incoming e-mail messages for critical, time-sensitive information, sends out alerts, and updates applications with the most timely data.

From the selection process to ongoing support and customization, Concentrix has partnered with Bayshore to tailor technology meet the company's specific business objectives. "From day one, Concentrix has been right there going the extra mile," said Sonya Grundy, Financial Process and Metrics Supervisor. "We realize the vendor is a key part of the success of an implementation. Concentrix' ability to see both the business and technical side was absolutely invaluable for us."

### Enabling Local and National Outreach

With a centralized database and custom inquiry form, Bayshore now collects the specific information it needs to manage client, influencer and employee relationships in each community it serves, while also launching national outreach efforts.

"Health care in many cases is a local relationship," Webster explained. "GoldMine allows us to manage those relationships locally, but it also allows us to roll it up and do national campaigns to specific target groups."

The system also enables Bayshore to stay in touch with and maintain strong relationships with employees – a particular need in the competitive health care field.

Bayshore can draw on such detailed data to measure its campaigns and efforts, ultimately to determine the return on investment of

each campaign and support decision-making. To measure data in GoldMine, Concentrix worked with NewComp, a reseller for the company's reporting application, and Cognos, to integrate the two applications.

Next, Bayshore plans to leverage the same integration technology that connects GoldMine with its legacy scheduling system to link GoldMine with its employee data and its accounting system. Reducing duplicate entry steps will bring further efficiency.

With standardized processes for managing its many relationships, Bayshore can provide a higher level of service to clients, communicate more effectively with employees and contractors, and expand awareness about its services at the local and national level – enabling Bayshore to compete more effectively.



### About Concentrix Business Solutions

Concentrix Business Solutions, with two locations in Ontario, Canada, provides business management solutions, including systems for accounting, distribution (ERP), manufacturing (MRP), eCommerce, warehouse management, payroll, human resources, sales force automation and customer care. The company's clients can be found in a range of industries, such as wholesale/distribution (including agents and brokers), transportation and warehousing, professional services, manufacturing, not-for-profit agencies, finance and insurance. The firm employs certified consultants and technicians with extensive business management, accounting and technology experience, allowing the team to effectively create and deliver results on time and within budget.

### AT A GLANCE

**Customer:**  
Bayshore Home Health

**Industry:**  
Health care

**Employees:** 5,000  
**GoldMine users:** 55

**Products:**  
GoldMine® Corporate Edition  
KnowledgeSync 2000

**FrontRange Solutions Partner:**  
Concentrix Technology Solutions Inc.

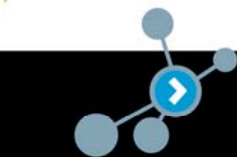
### GoldMine Business Benefits:

A custom intranet application guides users in capturing the required information in GoldMine on every call, improving the caller's experience and data collection.

GoldMine automates the steps of the sales process, so representatives at each branch office never fail to schedule and follow up with contacts.

Consistent, comprehensive information enables Bayshore to market locally and nationally, and measure its efforts.

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## About FrontRange Solutions

FrontRange Solutions develops award-winning software and solutions used by more than 130,000 companies and over 1.2 million users worldwide to manage a wide variety of business relationships and provide exceptional service. FrontRange product families, designed specifically for small-to-medium-enterprise (SME) and distributed enterprise organizations include: GoldMine® for business relationship management, team-based contact management and sale force automation solutions; IT Service Management with HEAT® and ITIL® standards-based modules for complete service management; and Communication Management including IP Contact Center for reduced telephony costs and increased agent productivity, streamlined customer service and communications; and Infrastructure Management, which provides the ability to optimize the full lifecycle of a company's assets. Customers representing 44 percent of the Fortune 100 and 76 percent of the FTSE 100, include Coca-Cola, Shell Oil, Prudential Securities, Électricité de France, Mack Trucks, Campbell Soup, Avaya, Bechtel Corp, Bank of America, and Turner News Network. For more information, call (800) 776-7889 or visit [www.frontrange.com](http://www.frontrange.com).

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