

## Chairman's Report



2016 was another productive year for the user group. Our Forum continues to prove very popular since its launch in January 2015. We now have over 900 members subscribed, and they have been busy with more than 1,270 posts and some 4,000 responses during the year.

Workshops continue to prove very popular with six workshops having been run across multiple product lines, with a total of 595 delegates attending this year. The workshops were held all around the country, in some interesting venues. The feedback from these has again been very positive.

With regards to 2017, we are now in the early planning stages for this year's workshops. If there is anything special you would like to see included in the programme, or you would like to volunteer to present a case study on a specific subject, please let Caroline or one of the Council members know. Watch this space, the Forum and the website for full details of the 2017 schedule over the coming months.

Don't forget to check out our website ([u4bwug.co.uk](http://u4bwug.co.uk)), feedback continues to be really positive. If there is further information you think should be included on the site, please let Caroline or one of the Council Members know and we will see if it can be included.

If you have any issues relating to Product or Unit4 that you would like the Council to raise with UNIT4, then please let any of the Council members know and we will look to discuss the issue with UNIT4 at the next meeting. Meetings are normally held on a bi-monthly basis.

The User Group Council are made up of Customers who represent the thoughts and views of the Customer base.

If you would be interested in becoming a representative please let me know we would like to have more representation from the Commercial and Health sectors.

**Ian Sibbald,**  
**AUKUG Chairman**

## Business World User Group Workshops

2016 was another busy year we held 6 extremely popular and well attended workshops which had very positive attendee feedback. A total of 595 delegates attended our events which were held around the UK.

We are often asked if the same workshop can be repeated at a later date and in a different part of the country. Unfortunately we do not have the budget to do this and also it would be extremely difficult to get all of the speakers back together to deliver again on another day.

However we rotate the events annually so it is very unlikely that the same topic will be presented in the same area of the country the following year. As our members are spread throughout the length of the country the User Group events are moved around to ensure all our delegates get to travel but sometimes less than others.

The Workshop venues are normally held at venues close to good connections for Road, Rails and Airports although there will always be some travel involved. We try to find unusual / interesting venues that also offer good value for money, last year saw us at the Magic Circle, Aintree Race

Course, Drayton Manor Theme Park, The Celtic Manor and George Hotels.

These workshop days are really valuable to the delegates not just because of the presentations but also because of the opportunity to network with other customers and unit4 staff and invited guests. This time out of the office can

be so valuable to those starting a new project, planning an upgrade or just wanting to talk to people who understand what they do back in the office. Over several events the members tend to build up a network acquaintance's which can help in their day to day role.



## Business World User Group Forum



Since the Forum launched in early 2015, members have been using the Forum to ask many questions which include Where, Why, How and What? The members work together to support one another and help learn more about their system.

Users of the forum have now risen to over 880 members who together have posted over 3,596 posts in 1,116 threads.

Access to the Forum is unlimited within your organisation as long as your organisation remains a member of the Business World User Group.

To get the most from the Forum you need to select the required areas of interest areas of Business World within the Forum that you are interested in following, so it is worth spending some time setting up your e-mail to get the most out of this forum.

If you would like a copy of the "How to notes" please email: [caroline.batten@unit4.com](mailto:caroline.batten@unit4.com) who will send them to you.

The Business World User Group uses the Forum as its main communication tool and all of the User Group events are advertised through the Forum.

If you have not done so already you can access the forum by going to [www.augforum.co.uk](http://www.augforum.co.uk)

## UNIT4 Ideas Update



It has been awhile since we have provided an update on UNIT4 Ideas but we have good news to share!

The UK User Group council members raised your concerns in relation to UNIT4 Ideas and lack of progress or updates seen, having listened and liaised with Development we will be making a number of changes to the current format over the coming months.

We apologise that we have not always been as prompt in responding to ideas raised but you should now be noticing that for some of the more recent postings this is improving.

Currently we are working to update the look and feel of Unit4 Ideas in particular updating the products and categories that you can choose from. Longer term we are looking at how we can incorporate this tool within the Service Cloud to provide a seamless experience to our customers.

We will be working with representatives from a number of our User Groups globally to consider the best method in which to deal with older posts.

We value your feedback both on our products and services we provide, so we hope you will bear with us whilst we make these necessary improvements based on the feedback you have provided.

**Lisa Young – Global Product Manager Unit4**

## Working together Unit4 Customer support and you

### Customer Surveys

Your feedback is really important to us, and as such we would be really grateful if you spend a few minutes to complete the surveys when a case is closed. It is great to hear when we have provided excellent service, but also really important to understand when we don't meet your expectations. We act upon all surveys where the overall score is lower than 3, and follow up in person to gain a better understanding of the issues regarding that particular support request.



### Unit4 Customer Escalation Process

Support Escalations are first initiated through the customer portal on the specific case that is not progressing satisfactorily. Escalation is initiated by clicking the "Escalate to Support Manager" button and providing a brief description for the escalation. The following screen shows where these buttons are located on a case. The screenshot also shows the small red arrow next to a case number. This arrow indicates the escalation has occurred and the case is already escalated.



Before escalating to a manager, a user is expected to go through "Request Consultant's follow-up" process, where the customer case contact should discuss first with the support consultant on the team before initiating the escalation. Please note Unit4 usually reject escalations request in the following situations:

1. The Customer has not followed the Support Case escalation process (e.g. case is left with the customer)
2. The escalation request or Support Consultant's have business or sufficient justifications
3. The Customer has not provided adequate time for Unit4 to respond and/or receive the issue.

Once the Support Manager has contacted the customer and dealt with that particular escalation, they will reset the escalated flag off. In the event that a case requires a second escalation, the process described above may be repeated.

If customers have a concern with Unit4 that does not relate to a particular product issue, or in case this process is also does not meet the dealer must Customer can email Unit4 with the details of their concern to [global@unit4.com](mailto:global@unit4.com). Please include as much background of the issue as possible along with the reason for the escalation. Customers may also indicate what outcome they would like from the escalation.

### Case Escalation

From time to time things don't always go to plan. It is important that when such things happen, you know how to escalate a case in the correct manner. You will find details of the process on the Customer Portal within the Learning Centre, or by clicking here. Please take a little time to familiarise yourself with this information.

**Jason O'Brien – UK & I Customer Support and Global Support Projects Manager**

# BW User Group Council visit the Customer Support Centre in Poland



On 21st March a group of UK User Group Council members attended a meeting at the Support Centre in Wroclaw, Poland.

The purpose of our visit (as well as our usual council business), was to see first-hand how support is working and managed on a day to day basis, to discuss our concerns, and to work together to enhance the support experiences.

As well as 7 Council Members, also present were Eric Tiden CTO, Atle Aune Director of Global Customer Support, Ryszard Szreter Poland Centre Manager, Derren Nisbet MD UK&I & Jason O'Brien, UK&I Support and Caroline Batten who needs no introduction!

The meeting started with introductions and explaining our aims for the day; luckily we were all on the same page with that! We had a tour of the offices and were able to meet and chat with many of the consultants working on support tickets; this was something I found particularly useful.

We continued our meeting with the Team Leaders and were able to explore some of the issues customers had raised whilst listening and understanding some of the difficulties they face and how they learn and improve their knowledge and experience. I came away with a real sense of enthusiasm and commitment; they are a young team in terms of experience but very keen to work with us. We were able to continue discussions in a more informal setting over dinner that evening and once again, I was impressed by everyone's commitment to us all working together.



I brought back two important pieces of information that I need to share with you to make all of our lives better when it comes to support issues:-

- Please send as much detail with your initial ticket as possible. This allows the triage process to ensure the right people and level of support are working on your request from day one.
- Every single closed ticket spawns a survey – please, please **always** complete and send back. That survey is vital to understanding where strengths and weaknesses lie, that training is provided where needed and that if a customer is unhappy, they are contacted straight away. It is crucial to their success and so therefore to ours. Please help them to help us!

Finally, I would like to thank Unit4 for their hospitality and in particular Ryszard Szreter Poland Centre Manager and his team for making us feel so welcome in Poland.

**Maureen Potter – University for the Creative Arts**



## Dates for the diary

### Business World User Group 2017 Calendar of Workshops

Common Functions ,Tools & Functionality across Business World	20th April	Central London
Technical	18th May	Leeds
HR & Payroll	22nd June	Bristol
Reporting	5th July	Birmingham
Purchase to Pay & Procurement	6th September	Woburn
Planner & Budgeting	2nd November	Edinburgh

### Meetings

Unit4 Offices Poland	21st March	Wroclaw
Wellcome Trust Sanger Institute	24th May	Hixton
University of Huddersfield	4th July	Huddersfield
Cranfield University	26th September	Cranfield
Unit4	6th December	Bristol

## User Group Council Members 2017

The User Group Council consists of a group of elected customer organisations who represent the thoughts and views of the Business World UK customer base. The council are always keen for likeminded people to join then so if you would like to know more about becoming a Council Member and what is involved, please contact the User Group Chairman by e-mail: [i.sibbald@cranfield.ac.uk](mailto:i.sibbald@cranfield.ac.uk) or anyone one of the council members listed below.

The Council are keen to get further representation for the Commercial, Health, Charities and Emergency Services Sectors which will help give a more balanced user's view to UNIT4.

The User Group Council, UK Board, and Executive members meet on a Bi-monthly basis to discuss and review changes within UNIT4, its products and any issues raised by the members. If you would like anything raised at these meetings with the Unit4 UK Board or Executive please let one of our Council members know.

Council Member	Organisation	e-mail
Ian Sibbald	Cranfield University	<a href="mailto:i.sibbald@cranfield.ac.uk">i.sibbald@cranfield.ac.uk</a>
David Evans	Genome Research Limited	<a href="mailto:de5@sanger.ac.uk">de5@sanger.ac.uk</a>
Malcolm Logan	Cefas	<a href="mailto:malcolm.logan@cefas.co.uk">malcolm.logan@cefas.co.uk</a>
Alan Hill	Institute of Cancer Research	<a href="mailto:alan.hill@icr.ac.uk">alan.hill@icr.ac.uk</a>
Baard Lyngnes	Mitsui Sumitomo Insurance (London Management) Ltd	<a href="mailto:blyngnes@msilm.com">blyngnes@msilm.com</a>
Frances Lubbe	Sweett Group	<a href="mailto:frances.lubbe@sweettgroup.com">frances.lubbe@sweettgroup.com</a>
Maureen Potter	University for the Creative Arts	<a href="mailto:mpotter@ucreative.ac.uk">mpotter@ucreative.ac.uk</a>
Julie Wallis	University of Bristol	<a href="mailto:julie.wallis@bristol.ac.uk">julie.wallis@bristol.ac.uk</a>
Yvonne Whiting	University of Huddersfield	<a href="mailto:y.whiting@hud.ac.uk">y.whiting@hud.ac.uk</a>
Zully Karbani	WSP Group	<a href="mailto:zully.karbani@WSPGroup.com">zully.karbani@WSPGroup.com</a>
Seema Kinsay	Goldsmiths University of London	<a href="mailto:s.kinsay@gold.ac.uk">s.kinsay@gold.ac.uk</a>
Mary Kent	Magnox	<a href="mailto:mary.kent@magnoxsites.com">mary.kent@magnoxsites.com</a>
Keith Pantaleon	Southend on Sea Borough Council	<a href="mailto:keithpantaleon@southend.gov.uk">keithpantaleon@southend.gov.uk</a>