



More Than a Supplier: Softcat's End-to-End Support for William Purves

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William Purves is a respected, family-owned funeral business operating across Scotland and Northern England.

With a heritage spanning generations, the company is known for its compassionate approach and commitment to delivering personalised services during some of life's most difficult moments. Despite its scale and

reputation, William Purves has traditionally relied on manual processes and limited digital infrastructure, which presented challenges as the business continued to grow and diversify.

Key Facts

1 Family-run funeral business with over 120 employees across multiple offices

2 Known for delivering highly personalised and professional funeral services

3 Historically operated with limited digital systems and manual workflows

The Challenge

William Purves faced two major challenges - one around improving customer experience, and another involving a sudden failure of their finance and HR systems.

wasn't really much of a kind of conjoined way of dealing with that. It was a bit chaotic at times and leading to some issues."

The customer service department was relying on aging workflows that were not best serving the needs of their customers. Staff were spread across different offices and often worked independently, which meant that when grieving families called in, they were frequently met by different team members who lacked the ability to call up notes on the customers. This led to callers having to repeat sensitive information multiple times, which disrupted the personal and empathetic experience the company is known for.

The second challenge came unexpectedly. Their legacy finance and HR systems, which had been in place since 2008, suddenly stopped working. A critical approval module failed overnight due to the system reaching end-of-life - something the vendor had not communicated. This left the business unable to process payments or invoices, forcing the accounts team to revert to signing off paperwork manually.

As Shaun Donaldson, IT Manager at William Purves, explained: "We had a situation where you've maybe got three people answering the phones that don't see each other very regularly... when clients phoned up, there

"We basically had to go back to a paper system of signing pieces of paper overnight, it was like going back 20 years," Shaun recalled. To make matters worse, the incumbent vendor refused to quote for a replacement system for three months, leaving the business in a vulnerable position with no clear path forward.

Critical Success Factors

A CRM solution that could unify customer interactions across offices while preserving a personal touch

A finance and HR platform that could be rapidly deployed to replace the legacy system and restore operational continuity

A partner who could act quickly, understand the business's unique needs, and deliver tailored solutions with minimal disruption

The Solution

Softcat stepped in not just to provide technology, but to act as a trusted partner throughout the transformation. Their approach was proactive, empathetic and tailored to the unique needs of William Purves.

To address the customer service challenge, Softcat recommended HaloITSM - a highly configurable service management platform that goes beyond traditional ITSM. Although typically used for IT support, Halo's flexibility meant it could be customised to suit funeral planning workflows. The platform gave staff a single view of each customer's journey - who they had spoken to, what had been arranged, and what needed to happen next. This ensured that every call was handled with continuity and care.

with annual stocktakes and little visibility. With Halo, staff could track inventory in real time, improving sales and reducing waste.

"We wanted a system that would bring up everything when someone called - who they last spoke to, what was discussed, what's next. Halo allowed us to do that," said Shaun.

At the same time, Softcat tackled the finance system crisis with urgency. When the previous vendor failed to deliver, Softcat reached out to Dogma Group - a Microsoft Gold Partner specialising in finance transformation. Dogma's solution was built on Microsoft Dynamics 365 Business Central and offered a modern, cloud-based alternative to the legacy system.

One of the most important requirements was that communications had to feel personal. Halo's ability to remove branding and ticketing indicators from emails was a key factor in its selection. "One of the biggest challenges was finding a technology where we could make sure the client sees none of the technology so it doesn't distract from the service," Shaun explained.

Melissa Chilton contacted Dogma's CEO directly, who personally ensured rapid deployment, even joining calls from overseas to keep things moving.

Halo's intuitive interface and Kanban-style workflow made it easy for staff to adopt, especially those familiar with tools like Trello. The platform also offered seamless integration with the company's phone system, allowing staff to instantly access customer records when someone called. This made the entire process smoother and more empathetic for both staff and clients.

"Melissa reached out to Eddie, the CEO of Dogma... we had a quote on the desk within two weeks. We actually started the project before we would have had a quote from the previous company," Shaun said.

Unexpectedly, Halo also enabled stock management for headstones - a department that had previously operated

Dogma's solution included finance, payroll and HR modules, and later expanded to include an employee self-service portal for payslips, tax information and personal data. The platform offered real-time reporting, automated workflows and integration with other Microsoft tools - helping William Purves move away from paper-based approvals and manual data entry.

Softcat didn't just source the technology - they coordinated vendor engagement, managed timelines, and ensured the solution was tailored to William Purves' operational needs.

Solution Highlights

HaloITSM configured for funeral planning workflows, customer service and stock management

Integration with phone systems for real-time customer data access and improved call handling

Dogma Business Central platform deployed rapidly to replace legacy finance and HR systems

The Benefits

The impact of Softcat's solutions has been transformative for William Purves - both in terms of customer experience and internal efficiency.

juggled multiple email chains and Trello boards. Now, everything is consolidated into one or two cards. "One staff member in particular has got an admin background and already had experience with the change," Shaun shared. The addition of stock management has helped the business track headstone inventory more effectively. Staff now know what's available and make sure customers are aware of what stock is available rather than relying on the brochure.

Customer service is now much more seamless. Staff have a full view of each client's journey, so callers no longer have to repeat themselves. "In terms of being able to pull the data and things like that, it's much better, it's much quicker; customers are getting a better service without the solution being intrusive on the experience," Shaun said. Internally, Halo has simplified workflows. Staff previously

“Whenever we changed the brochure, or somebody saw an old one it was never clear immediately what exactly was available. previously stock that would have just sat there assumed sold out that customers may have missed out on. Now our staff know in real time what we have so customers aren't disappointed.”

Shaun Donaldson,
IT Manager at William Purves

Dogma restored operational continuity and brought in modern HR and payroll capabilities. The employee portal has made life easier for staff, and Softcat's support throughout has been a key part of the success.

"Dogma have been brilliant across every one of the projects. We've done three now and they've been amazing," Shaun said.

Benefits at a Glance

Improved customer experience through unified CRM and personalised communication

Streamlined internal workflows and reduced administrative burden

Enhanced stock visibility and operational efficiency in headstone management

Why softcat

For William Purves, Softcat isn't just a supplier - they're a trusted partner who understands the business, acts quickly, and delivers with care.

"Softcat always gives us what we need. We're always willing to spend a bit more for better a superior service, but the pricing usually comes out better too," he added.

"The costing is always good, but the customer service is also amazing. From my side, it saves me a lot of time. I can just phone up Mel, ask her to get on with something, and she'll come back with the proposals," said Shaun.