

Microsoft Dynamics 365  
provides the cornerstone  
for modernisation at  
disability care provider

CUSTOMER

**Disability Care Provider**

LOCATION

**Australia**

INDUSTRY

**Healthcare/Not-for-Profit**





## Challenge

- Disparate and outdated IT systems, manual processes, siloed databases, poor data integrity, and limited technology integration
- Cumbersome and disjointed enquiry-to-conversion (E2C) process
- No cohesive/single view of the customer journey
- Need for NDIA portal integration to manage funding and compliance



## Solution

- A single, modern customer experience platform
- Microsoft Dynamics 365 Customer Engagement (Customer Service module)
- Microsoft Power BI



## Results

- A modern, streamlined way of managing the customer journey and a single version of the truth
- Improved client engagement, experience and outcomes
- Increased staff productivity
- Elimination of manual process with increased data accuracy, visibility and integrity



## Microsoft Dynamics 365 provides the cornerstone for modernisation at disability care provider

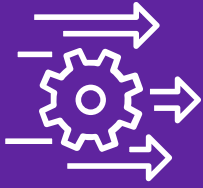
Established for the purpose of caring for young children with high disability needs, this disability care provider has matured into an organisation with comprehensive services focused on giving people from all walks of life every opportunity to thrive.

This not-for-profit healthcare organisation provides high-needs disability support to more than 1,500 families, with services covering community hubs, in-home support and supported independent living, short-term accommodation, specialised behaviour services, housing, social experiences and holidays, creative arts, transition from school programs, and supported employment.

The highly skilled and diverse team comprises more than 1,100 staff — all of whom believe in delivering creative and social experiences to help customers get more out of life.

### **Business challenge**

As the care provider looks to the future and its vision to be a leading, sustainable provider of support to those with complex needs, the requirement to modernise and streamline customer experience (CX) was clear. As part of a broader business expansion and digital transformation program, it needed to replace disparate and outdated IT systems with a single, modern CX platform to improve the service provision journey: from initial enquiry to case management. Known as E2C (enquiry to conversion), this process was cumbersome and disjointed, with no cohesive view of the customer journey available.



“Simply put, we had to change how we managed the business.”

— A senior project manager at the care provider

The disability support sector is complex, requiring the collection of important information and additional obligations regarding the National Disability Insurance Scheme (NDIS). As part of the scheme, the new National Disability Insurance Agency (NDIA) portal fundamentally changed how customers access and manage their funding, while increasing provider compliance requirements.

The care provider’s staff responsible for the customer journey needed to access several systems and screens to obtain medical history and disability details, understand the customer’s requirements and goals, and generate a case for action, before conducting an assessment and preparing a quote. Multiple, complex spreadsheets were created and stored on shared drives to manage the enquiry process, with no one individual understanding how it all inter-related. Once an enquiry progressed to become a client, a legacy customer relationship management (CRM) database was used to manage ongoing interactions.

With siloed databases, poor data integrity and limited technology integration, the care provider recognised the importance of more efficient and reliable technology to better support its communities while staying competitive in a saturated market. The time was right to modernise ageing processes to improve both CX and efficiency.

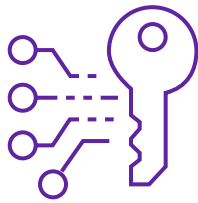
A senior project manager at the care provider said, “Simply put, we had to change how we managed the business. We knew the customer journey wasn’t always smooth, with existing manual processes and inaccurate data hindering our ability to deliver the right services, identify loss-making services, and recognise emerging service needs to create new revenue streams. There was also added complexity in getting the manually collected data into our CRM once a customer joined.”

In addition, the company has ambitious growth plans for the near future, with the CEO recognising the need to automate and modernise systems to remain relevant in an increasingly competitive and crowded market.



“This approach provided enough time to address any identified concerns and made all the difference to achieving a successful release and initial user take-up.”

— A spokesperson from the care provider



The new solution immediately highlighted some poor data entry practices, which the organisation rectified with simple process changes.

### Solution

DXC Technology helped the care provider implement Microsoft Dynamics 365 Customer Engagement (Customer Service module) and Microsoft Power BI to create a single, modern CX platform. Taking an Agile approach, the solution was configured in six short sprints with time for review before moving on. DXC delivered the solution on time and slightly under budget with minimal customisation.

Dynamics 365 is a cloud-based CRM solution offering the insights and freedom to thrive by connecting data, processes and team members with intelligent business applications. It provides a single customer view while helping to build stronger relationships, provide excellent customer service and improve employee productivity and performance.

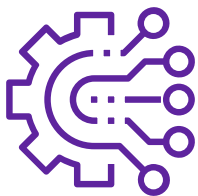
The DXC Practice for Microsoft was selected based on its reputation in the market, deep knowledge of the healthcare and community services sectors, and previous experience implementing Dynamics 365. In addition, the community service pricing offered by DXC aligned well with Microsoft’s not-for-profit pricing. Leveraging DXC’s expertise, the care provider could go to market faster with pre-defined best practice processes and accelerator templates

enabling a much shorter configuration and implementation time.

DXC helped the provider clarify business requirements and collaborated to showcase functionality to the team and key business stakeholders. By deciding to use best practice processes within the solution and minimise customisations wherever possible, the business can easily take advantage of Microsoft’s regular upgrades and bug fixes without the risk of something breaking.

DXC staged a pilot and released the solution to a subset of user champions first, providing additional training in a controlled manner. The care provider had gained agreement from management that these superusers would be relieved from the pressure of their regular work as much as possible for the few weeks they were needed for the pilot.

A spokesperson from the care provider said, “We changed the scope to include a staged implementation since culturally this was a huge step for us. There was a level of angst amongst the executive and user team with people concerned about the effect of the new solution. This approach provided enough time to address any identified concerns and made all the difference to achieving a successful release and initial user take-up.”



The ability to analyse and view data with new reporting capabilities has virtually eliminated manual report creation.

## Results and benefits

From go-live, the solution has provided a cornerstone to the care provider's business and a foundation platform for future transformation. It's a significant technological change for the organisation in response to the ever-changing disability funding model and increasing customer choice and control.

It has modernised how the organisation manages the E2C journey with team members excited at the prospect of using industry-leading digital technology like Dynamics 365. The system structure means users can't skip processes or essential data capture, and it's already helping the disability care provider respond more efficiently to customers' needs and focus on higher-value tasks. With data updated every 15 minutes, benefits include enhanced data visibility and integrity and a single source of truth for the E2C process and beyond. The three-way integration between the existing CRM, the NDIA portal and Dynamics 365 has already contributed to increasing staff productivity, and most importantly, improved client engagement, experience and outcomes.

The new solution immediately highlighted some poor data entry practices, which the organisation rectified with simple process changes. Team members responsible for the customer journey previously had to access several systems and screens to record details, with spreadsheets tracking workflow. Now everything is managed in Dynamics 365. The organisation achieved full B2B integration with the NDIA portal (where the customer's budget is allocated) — one of the first and by far the most successful provider to do so in Australia to date. In fact, the NDIA will use some of the organisation's integration learnings to support other service providers looking to achieve similar success.

The ability to analyse and view data with new reporting capabilities has virtually eliminated manual report creation. Executives love the dashboards, with many having never seen data presented in this cohesive and strategic way. Previously, it often took days to access ad hoc reports, and those came with low confidence in data accuracy.



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— A spokesperson from the care provider

The care provider’s customer enquiry manager views the new BI dashboards daily to analyse new call/customer details and support by region at individual and team levels, to identify who is carrying larger loads. Customer responsiveness has improved with instant visibility on enquiries and proactive follow-up of client quotes. More accurate drawdown of funds can be reported, reducing the chance of over-servicing and the potential for a customer to run out of funds. While it’s early days, this will positively impact service delivery and decisions about future business direction based on facts, rather than intuition.

A spokesperson for the care provider said, “We know the data is accurate. Executives have visibility of activities and challenges, a better understanding of the types of questions to ask, confidence in the information to make decisions and support change, as well as prompts to investigate when things don’t look right.

“If anything, the solution is driving more questions, which will help us analyse operations, provide visibility to bottlenecks, recognise inconsistencies in data input, and identify where we might need new processes.”

The organisation wants to decrease its impact on the planet and has already seen a steady reduction in paper use. Previously people printed something, annotated it and saved it as a PDF. Someone else might re-print, annotate and resave the document. Now people trust the flow within Dynamics 365, making and viewing changes within the system with accessibility in near real time.

Another benefit is offered by regular One Version updates provided by Microsoft. The spokesperson commented, “As a cloud-based solution, we have access to regular updates. Staying up-to-date and not having to worry about end of life is a major benefit. Especially when mission-critical solutions have previously reached their end of life, due to restricted funding for upgrades.”

The spokesperson concluded, “I can’t recommend DXC highly enough. I had never previously worked with them but heard only good feedback. They didn’t let me down. We found the team to be very professional, flexible, responsive, and knowledgeable. My test of a good relationship is when things don’t go well. We had some internal issues early on, but DXC was right by my side, helping me resolve them and win people over.”

## The future

Technology will continue to play a pivotal role in making it easier for the organisation's staff to support customers while ensuring compliance requirements are met. This new system has set the company up for the future, improving the customer journey from initial enquiry through service delivery and beyond. A representative from the organisation said, "In the short term, we have a wish list of requirements DXC is helping us work through to prioritise."

The NDIS provides increased choice and flexibility for customers, with the modern platform implemented by the care provider helping to drive future transformation. The organisation is excited to continue transforming its CX with self-serve options on the roadmap, improvements to the assessment and on-boarding processes, reduced wait times, and a potential replacement of the existing CRM with a modern, cloud-based solution.

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