A leading post-hospital care & hospitality organization improved business efficiency by leveraging Dynamics 365

Customer

The customer is a top provider of post-hospitalization critical care in the US and serves people of various clinical programs.

Business Challenge

The customer's existing CRM application was not scalable and didn't have enough support from their vendor on enhancements and application management.

The customer had a referral program where they will get referrals from different sources like hospitals, social workers, and advertisements.

They were looking for a partner who could help their management team evaluate a solution to **improve their referral management processes and applications**.

Their core challenges include:
- The current system didn't have a streamlined and automated referral process

- Manual creation of reports and dashboards was hampering employee productivity thereby, increasing the cost

- No mobile application for the sales team and there was no mapping to the existing referral program

- Approval workflows for referrals was a complicated process

WinWire Solution

WinWire proposed the customer to implement **Dynamics 365 sales module.**

- The referral program got mapped to an existing sales process in CRM with further configuration and customization using out of **box entities** like account, contact, lead, and opportunity.

- The custom entities were added to configure master and transactional data.

- Implemented **workflows at different stages** for the approval process, starting from referral to the discharge of the patient. Since the client has referrals coming from various sources like doctors, social workers, and there is a separate process for each source.

- Implemented **integration with SharePoint for document management and Outlook integration** for better usability and configured the mobile app for the sales team. This solution also includes integration with its local warehouse database.

- Developed reports using **Power BI for analysis**, and their existing data was successfully migrated from legacy CRM

Business Value

- Solution evaluation process helped establish end-user buy-in early in the implementation process

- Streamlined the referral process to decrease time and costs associated with processing referrals

- Decreased the amount of time managers spend processing data and creating reports