

HOME CARE SERVICES

**Providing Caregivers and Trained Nursing Services
across Country Borders – Case Study**

How **Direction Software LLP** implemented effective integration between **Germany & Poland** to meet **demand and supply of Home Nursing Services** using a Microsoft Dynamics CRM Solution



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DIRECTION
Software LLP

Executive Summary

The Client

- HomeCare - Germany
- HomeCare - Poland

Industry

Health Care

The Need

- Better integration between the two systems (HCPL & HCDE)
- Maximum Digitization & Automation to increase efficiencies
- Better documentation & improved customer service.

The Solution:

- Implementation of Microsoft Dynamics 365 CRM
- Data synchronization between HCPL and HCDE
- A "Matching process" to ensure supply meets demand perfectly
- Incorporation of Greenfield implementation
- Implemented Sales & Service Management.

Benefits

- Better integration between the two systems
- Greatly improved visibility in operations
- Easy and smooth operations
- A structured & guided process
- Increased digitization
- Maximum automation of most processes
- Improved customer service
- Reduction in waiting time
- Increase in employee productivity & effectiveness.

The Client: HomeCare

HomeCare Germany (HCDE), established in the year 2011, specializes in the nationwide placement of private nurses from the (adjoining) EU-countries. HCDE arrange caregivers and trained nurses for the elderly.

HomeCare Poland (HCPL), established in the year 2019, is a Recruiting company. HomeCare PL is the partner company of HomeCare DE.

Summary:

This project is based around implementing the Microsoft Dynamics CRM Online Environment in HomeCare Germany & HomeCare Poland.

- **HomeCare Germany's** platform offers customized requesting and sorting of caregivers from their registered network, enabling users to take care of their elder family members
- For **HomeCare Poland** we implemented a process for providing individual hiring between HomeCare Germany and HomeCare Poland. We automated most processes in Poland, that previously were carried out manually
- This project also addresses sales opportunity tracking as well as managing the care provider hiring process for both HomeCare Germany & HomeCare Poland.

Microsoft's Customer Relationship Management (CRM) software is widely used by business for Sales, Marketing and Service purposes. For the CRM, we have deployed a Microsoft CRM Online environment. This online environment will remove the huge cost of infrastructure and maintenance. The Microsoft Dynamics CRM Online, provides flexibility, for "One only pays what one is using".





Challenges of a cumbersome system

For HomeCare Germany

- The entire communication system included emails & phone calls. Appointments were not recorded in the system
- Documentation process was not well organized
- Departments handling 80 to 100 customer accounts were finding it difficult to track manually.

For HomeCare Poland

- Most of the operation's were carried out manually
- Work was on excel sheet without any CRM implementation
- Data was processed manually leading to unproductive and inaccurate reports
- The Documentation for the business process was maintained manually.

For Both HomeCare Germany & HomeCare Poland

- Overall long waiting time during the inquiry for offer and services
- For the entire business transaction, only one opportunity entity form was used by all the departments
- A structured and guided process was missing.

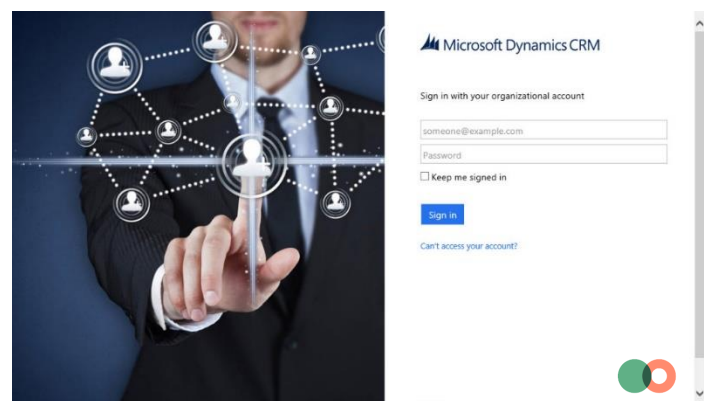
The Solution: An efficient Microsoft Dynamics CRM online environment

For HomeCare Germany

- Implemented low code and gave flexibility with out-of-the-box functionality to the core
- Data was synchronized between HCPL and HCDE
- Implemented Sales Management and Service Management
- Implemented a "**matching process**" to compare and provide the exact service person as per customer requirement
- Integration between websites with the new system
- Empowerment with Microsoft add-ons to get the benefits on day-to-day processes.

For HomeCare Poland

- HomeCare invited Direction Software LLP to implement Microsoft Dynamics 365 CRM for HCPL system, which was absolutely clean and a fresh start
- Data was synchronized between HCPL and HCDE
- HomeCare PL helped to do the supply part of providing quality caregiver people (direct recruitment), offering better pricing and to taking care of requirement for caregivers by HCDE
- Integration helped to do the data exchange between demand and supply i.e. HomeCare (PL) CRM and HomeCare (DE) through D365 CRM.



Benefits: Operations are now easy & smooth

For HomeCare Germany

- The new system will help HCDE to co-ordinate efficiently with over 70 Service Providers and large number of customers
- We Direction Software LLP, with our experience and expertise, incorporated the Greenfield implementation, to help HomeCare seamlessly and smoothly provide the best caregiver service.

For HomeCare Poland

- Through digitization and automation, HomeCare is trying to provide the best-of-services to its internal and external customers
- The new system automated most of the processes in Poland, that were previously carried out manually
- Integration between the two systems (HCPL & HCDE) has greatly improved visibility in operations
- Much improved customer service
- The new system will work like an essential operating tool for business.

For Both HomeCare Germany & HomeCare Poland

- Employee productivity and effectiveness has increased
- The changes have made the operations easy and smooth.



About Direction Software LLP: Microsoft Gold Partner

Gold
Microsoft Partner



Direction Software LLP is a global IT services company that delivers real-world technology solutions to Global corporations.

DIRECTION's portfolio of technology services includes Consultancy & Development, Implementation and Maintenance services.

In depth domain knowledge, superior design skills, faster development methodologies, stringent testing and quality standards have nurtured DIRECTION's technology services offering.