

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

How **DSS** implemented effective integration between  
**Germany & Poland** to meet **demand and supply**  
**of Nursing Services** using  
Microsoft Dynamics CRM Solution



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**DIRECTION**  
Software LLP

## Executive Summary

### The Client

A Nursing services company in Germany and Poland

### Industry

Health Care

### The Need

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

### The Solution:

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

### Benefits

- Better integration between the two systems (Germany & Poland)
- 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: A Nursing Services Company

**The German Branch**, established in the year 2011, specializes in the nationwide placement of private nurses from the (adjoining) EU-countries. This branch arranges caregivers and trained nurses for the elderly.

**The Poland Branch**, established in the year 2019, September, is a Recruiting company. This branch is a partner company.

### Summary:

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

- **The German** platform offers customized requesting and sorting of caregivers from their registered network, enabling users to take care of their elder family members
- For **Poland** we implemented a process for providing Individual hiring between the German branch and the branch in 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 Germany & 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 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 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 Germany & 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.

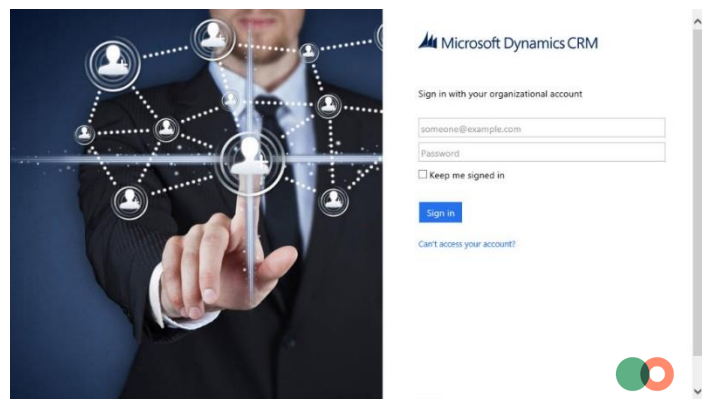
## The Solution: An efficient Microsoft Dynamics CRM online environment

### For Germany

- Implemented low code and gave flexibility with out-of-the-box functionality to the core
- Data was synchronized between Poland and Germany
- 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 Poland

- This branch invited Direction to implement Microsoft Dynamics 365 CRM for the Poland system, which was absolutely clean and a fresh start
- Data was synchronized between Poland and Germany
- The branch in Poland 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 German Branch
- Integration helped to do the data exchange between demand and supply i.e. Poland CRM and Germany through D365 CRM.



# Benefits: Operations are now easy & smooth

## For Germany

- The new system will help this German branch to coordinate efficiently with over 70 Service Providers and large number of customers
- We Direction, with our experience and expertise, incorporated the Greenfield implementation, to help this branch seamlessly and smoothly provide the best caregiver service

## For Poland

- Through digitization and automation, this branch in Poland 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 (Poland & Germany) has greatly improved visibility in operations
- Much improved Customer service
- The new system will work like an essential operating tool for business

## For Both Germany & Poland

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



## About Direction Software LLP : Microsoft Gold Partner

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