

Business Case – Service Planning

Client's Background

Customer is a public body which falls under health and human services. One of the functional area of this body comprises of services related to intellectual and developmental disabilities.

Customer is involved and responsible for designing and running a program for services related to intellectual and developmental disabilities. Customer coordinates between end service consumer and actual service provider. Customer approves the different service providers based on different criteria and then end consumer can avail respective services from the service provider based on the service plan.

Client's Challenge

Customer has multiple geographical and functional departments with different set of people located at different locations and different people have different responsibilities and authorities. Earlier customer had no centralized system in place to perform different activities. Most of the work was completed based on the paper work. This information has to exchange between customer, service provider and end consumer at different stages of the event.

Based on the above information customer was facing following challenges.

- 1) Quick and easy data access anywhere to customer and service provides to enhance the service planning and service delivery.
- 2) Secured access to data of end service consumers to customer and service provider.
- 3) Reduce and finally eradication the fraudulent claims for services.
- 4) Efficiency in tracking and dynamically responding to high frequency critical events that drive the changes to end consumer service plans.
- 5) Improving the TAT of approving the plans and budget at different stages of the system. Due to different locations and paper work this functional area was affected the most technically.
- 6) Improving the productivity and responsiveness of the organization staff.

The Our Value

We performed the analysis of the current system to identify the problem areas, scope of the functional area. Based on these facts we proposed the MS Dynamics XRM as the platform for the core system.

MS Dynamics XRM is a robust, highly extensible Microsoft product which offers lot of out of box features to design and deliver customized solution.

We have a four years of experience on designing and customizing solutions on top of MS Dynamics XRM. We have a pool of resources which can deliver cutting edge solution on top of MS Dynamics XRM platform.

We addressed following pain areas for the customer.

- 1) The new system will enable the organization staff and providers to perform their work in their functional area from a central repository using a modern web browser from any location where a high speed internet connection and a computer is available.
- 2) Security model implemented made sure that only relevant data is accessible, modifiable to each user of the system. Security model can be configured as and when needed.
- 3) As all the provider service history and end consumer availed services history is available in the common system, system helps determining duplicate claims. The same consumer cannot be recorded in the system multiple times and then availing the multiple services and such scenarios are avoided.
- 4) The system is capable of responding to critical events of end consumer. The common scenario is when consumer services are requested then have to go through different approval processes from different functional divisions before it gets finally approved. System creates a task for such activities and

add those to the respective person's (staff) queue or a particular team. Then that person/team has to take certain action to close the task or move the task to the next level as per the requirement. When the tasks are created the respective person or team is notified through email and system with description. This way system helps make sure timely actions are taken and no activity is left without action.

- 5) Earlier lot of time was involved in moving paper documents from one department to another department for approval process which also involves multiple geographical locations. Lot of time was wasted in communication and tracking the documents. As the approver at any stage can get access to relevant data any point at anywhere along with supporting details, TAT for approval process improved dramatically.
- 6) As now centralized system is in place and access to data can be given based on requirement, the overall process of decision making and closing the activity is improved. As the staff can easily lookup the data into the system rather than finding the paper documents or requesting documents from different location, the productivity and responsiveness of the staff is improved.