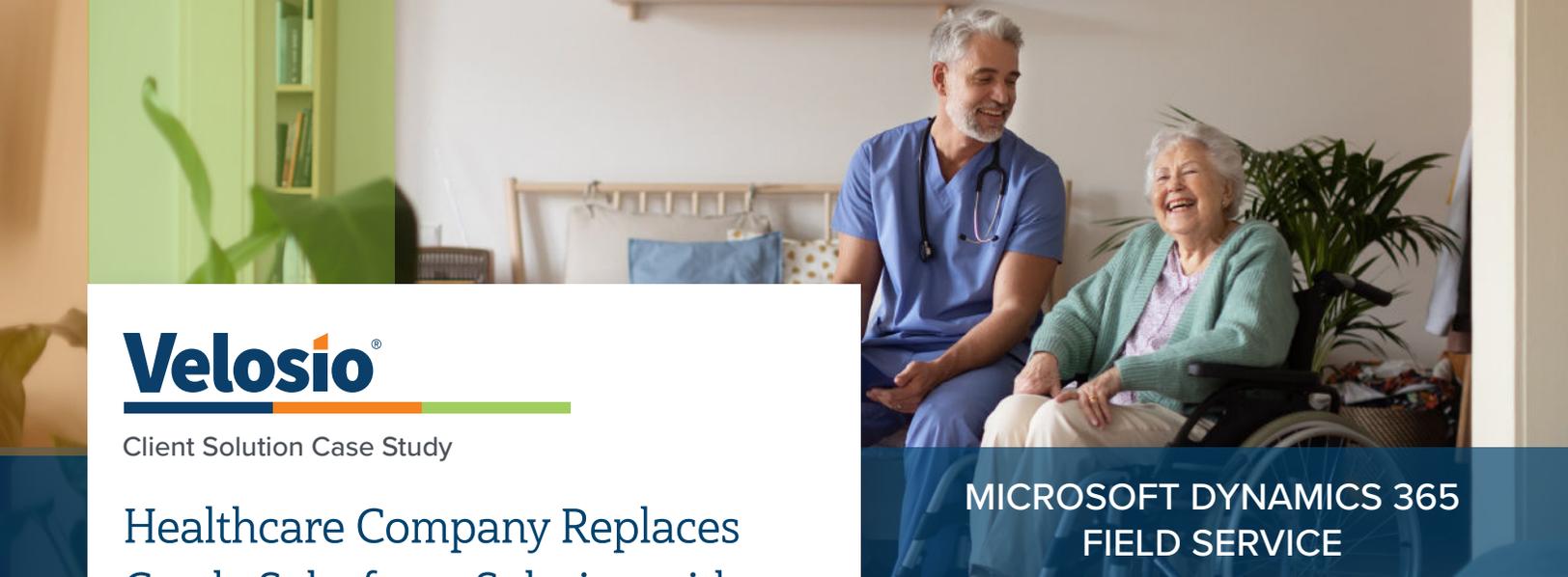




Client Solution Case Study

Healthcare Company Replaces Costly Salesforce Solution with Microsoft Dynamics 365 Field Service for Improved Patient Care



MICROSOFT DYNAMICS 365
FIELD SERVICE

Approaching a Salesforce Price Increase

A leading provider of comprehensive health and wellness visits, advanced diagnostics and care management services was previously managing and scheduling its network of home healthcare licensed providers – including physicians (MD/DO), nurse practitioners, physician assistants, and medical technicians – with Salesforce. Approaching a hefty price increase from Salesforce, the company needed to find a more efficient and cost-effective solution. The healthcare provider was utilizing Microsoft Dynamics 365 Customer Engagement for its call center, so looked at Microsoft Dynamics 365 Field Service as an integrated solution for scheduling its healthcare providers.

The company asked Velosio the question, if we have 2,000 nurses visiting 5,000 patients tomorrow, what's the optimal way to schedule them? Which nurses regularly see which patients? What are the most efficient routes for the nurses to travel to see the most patients in their workday? Velosio demonstrated Microsoft Dynamics 365 Field Service

to the team, which addressed all these questions and more, and had a much fresher look and feel than the outdated Salesforce user interface.

Tight Implementation Timeframe

The healthcare provider selected Microsoft partner Velosio to implement Microsoft Dynamics 365 Field Service based on its success with other healthcare organizations and proven track record. The implementation timeframe would have to be tight because of the looming Salesforce price increase. Within just six months, from May-October 2021, Velosio implemented the solution.

System Benefits

The team now has a much more efficient process for scheduling home healthcare visits – saving time, money, and resources. The schedule is optimized and turned over to the team much quicker, with more time for tweaking if necessary. In addition to managing home visit schedules, the company can now notify patients when their healthcare provider is on the way.



Their disparate call center and field service systems are now integrated into one integrated system, with centralized data. The team is also utilizing Microsoft Power Platform for additional efficiency, executive insight, and data intelligence. Patient care is now much improved, from appointments, to scheduling, to the patient call center.

Key Capabilities of the solution include:

- Schedule home visit: Enable care coordinators to schedule home visit appointments, while viewing patient information directly in context.
- Provider scheduling: View schedules of care team members and optimize visiting routes.
- Home visit coordination: Coordinate care and support distinct processes and tasks for the home visit.
- Patient notifications Notify patients of arrival times and send follow-up patient satisfaction survey.
- Efficiently manage daily cancellations and route changes within Field Service.

 Discover how Velosio can help your business with Microsoft Dynamics 365 business applications.

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