

CHAPTER 9 ACHIEVING OPERATIONAL EXCELLENCE AND CUSTOMER INTIMACY: ENTERPRISE SYSTEMS

CASE 2 Evolution Homecare Manages Patients with Microsoft Dynamics CRM



VIDEO
CASE



SUMMARY: Evolution Homecare used Microsoft Dynamics CRM to improve delivery of its home health services. Benefits have included productivity improvements, enhanced inventory management, better resource planning, and more effective reporting. L= 5:14

URL <http://www.youtube.com/watch?v=JgCz9tfcXV0>

CASE For people with serious illnesses, many procedures must be performed in medical facilities like hospitals and skilled nursing homes. But it is also possible to deliver medical-related services in a home setting using a home health-care service. In most cases, it is much more economical to be treated at home, and recent studies show that patients receiving health-care services who are surrounded by their family and friends make faster progress.

Home health care may include skilled nursing in addition to speech, occupational and physical therapy. It also includes monitoring the patient's prescriptions and sometimes assistance with household chores. In the United Kingdom, Evolution Homecare is a leading provider of home health-care services, with special expertise in the supply and administration of critical medicines to patients in their homes. Evolution Homecare is part of the Celesio Group, which is one of the leading trading companies and service providers within the pharmaceutical market worldwide. The company services the entire United Kingdom.

continued

Evolution's highly trained nurses and trained drivers provide a personal, flexible, clinical service to individual patients in their homes that features end-to-end delivery management, a single point of contact, personal advice, and a high degree of choice. Medicines can be delivered to family members, neighbors, a work address, the local Lloyds Pharmacy or the patient's home—whichever is most convenient. Evolution has the capability, the technology, and the infrastructure to guarantee the safe, professional administration of life-critical medicines, whatever the time or place.

After receiving information about a patient's treatment regimen and prescriptions, Evolution enters this information into its database and contacts the patient to arrange for home delivery of prescriptions. Evolution's Patient Services Team contacts the patient a week in advance to remind that person of the forthcoming prescription delivery. The day before the delivery, Evolution's pharmacy dispenses the drugs, and Evolution's drivers deliver the medicine at the appointed time and place. If necessary, a nurse will visit for the first delivery to show the patient how to administer the medication. Evolution's accounting system generates an invoice for these services and provides regular reports to show that its service-level agreement has been met.

Prescriptions prepared at Evolution's Bedford pharmacy at 4pm are ready for dispatch to a patient by 6 a.m. the next day. The medicines are dispatched from one of Evolution's eight accredited depots using special temperature-controlled vehicles. Temperatures are monitored via the driver's dashboard display and remote satellite tracking.

Microsoft Dynamics CRM is a Customer Relationship Management software package supporting Sales, Marketing, and Service (help desk) functions to help organizations manage their customer relationships. Dynamics CRM is a client-server application, which, like Microsoft SharePoint, is primarily Web-based and which also supports extensive Web services interfaces. Clients access Dynamics CRM either via the Microsoft Internet Explorer Web browser or via client plug-in software to Microsoft Outlook.

Microsoft Dynamics CRM 2011 is built on a very powerful and flexible platform that encourages customization. In recent years, Microsoft has been encouraging partners to use its proprietary framework to customize Dynamics CRM to meet many different demands, especially business processes requiring some form of relationship management. Some people in the industry call this "XRM" because the X factor (X = anything) can mean any relationship important for a business to manage information around. Organizations using Dynamics CRM are able to define the people, money, and things as they relate to their organization and cost-effectively configure a rich business application in line with their own specific needs, internal nomenclature, and workflows.

The accompanying video shows how Evolution Homecare used Microsoft CRM to manage patient relationships and the delivery of prescriptions and health care services to the home

setting. As you view this video, try to determine the benefits produced by the system, as well as some of the functions of CRM software that Evolution Homecare is using.

**VIDEO CASE
QUESTIONS**

1. Visit the Web site for Microsoft Dynamics CRM to learn more about this software's features and capabilities. What features of this software would be especially attractive to a company like Evolution Homecare?
2. Why do you think Evolution chose Microsoft as its CRM vendor?
3. What benefits did Evolution realize by using the CRM software? How did the system improve decision making and operations?
4. If you were a patient, what benefits might you receive from this system?

COPYRIGHT NOTICE

Copyright © 2013 Kenneth Laudon.

This work is protected by United States copyright laws and is provided solely for the use of instructors in teaching their courses and assessing student learning. Dissemination or sale of any part of this work (including on the World Wide Web) will destroy the integrity of the work and is not permitted. The work and materials from this site should not be made available to students except by instructors using the accompanying text in their classes. All recipients of this work are expected to abide by these restrictions and to honor the intended pedagogical purposes and the needs of other instructors who rely on these materials.