DXC Eclipse helps Trinity Alliance Group manage client data with Dynamics 365 Customer Engagement

Client name: Trinity Alliance Group

Location: New Zealand

Industry: Not-for-profit

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Challenge

Three organisations, Safe Network, Well Stop, and Stop, make up the Trinity Alliance Group. These not for profit agencies work in the harmful sexual behaviour (HSB) sector to reduce the incidence and impact of harmful or problematic sexual behaviour on communities in New Zealand. The three agencies work together in terms of their relationship with government agencies that fund their work, sharing resources and practices to provide a national service.

The three agencies work with children, teenagers and adults who have engaged in problematic or harmful sexual behaviour across New Zealand. As they are responsible for delivering a national service, servicing remote communities with specialised clinicians who need to see clients face-to-face is an ongoing challenge.

Manual processes make it difficult to retrieve and analyse information and the extreme sensitivity of the information they deal with necessitates a strong security posture to protect that information. Furthermore, their government funding agencies require outcomes based reporting to make decisions around resource allocation and ongoing financial support.

Don Mortensen, chief executive, Stop, said, "We're moving towards more outcome-focused results, so Trinity Alliance Group needed a better way to manage client data. This required a system that could facilitate real-time data collection to provide both outcome reporting and better service management. The system also needed to accommodate staff working in a mobile way, letting them access data on a range of different devices."

These challenges are complicated by the fact that, like most not-for-profit organisations, the Trinity Alliance Group has limited IT resources. The group therefore needed to work with a strong technology partner that could guide it through the process.

Solution

The Trinity Alliance Group chose Microsoft Dynamics 365 Customer Engagement for its stellar reputation around security and reliability, and the platform's familiar user interface and ability to integrate with existing systems and processes.

Don Mortensen said, "Dynamics 365 Customer Engagement is a solid customer relationship management (CRM) solution that manages our enquiries and contacts, with a data management system that goes right through from referral to delivery and assessment of services. It draws out real-time data, letting us track and manage our digital work, and it integrates with the systems we have in place. This includes Microsoft Office as well as industry-specific clinical tools."

Projected outcome and benefits

This project has been extremely important to each of the three agencies. As three independent agencies working together, each of them needed the capability to manage their own clients, track their progress, report on outcomes, and let managers draw on real-time data. As an alliance, the group needed a mechanism to bring all that data together to let it report to stakeholders nationally and use that data for international research as well.

Don Mortensen said, "The success of this project will unlock new opportunities for Trinity Alliance Group. In addition to the day-to-day management of clients, it has opened up huge research possibilities because we can now collect national data, which is quite unique. There is no other jurisdiction where one country has been able to collect national data in this field. This will also bring new opportunities for international research."

The project has furthered the group's digital transformation goals. By moving from manual systems to digital ones, the group will be able to let referrals come straight through into its client management system without anyone having to key in data. This will mean greater confidentiality, efficiency, and accuracy.

Don Mortensen said, "Digital transformation will let the agencies in the Trinity Alliance Group connect with clients in a digital way. For example, this includes the use of password-protected portals where stakeholders can access information related to their clients, or clients themselves can access their own data. This project has established a platform for our digital transformation journey through Microsoft Dynamics 365."

Staff are likely to benefit from the new system because Dynamics 365 Customer Engagement integrates seamlessly with the team's email platform, Outlook. DXC Eclipse created streamlined connections that make working with emails faster, easier, and more intuitive. This will let managers check clients' progress, review the workload of clinicians working with clients, and provide real-time data for the organisation and its stakeholders.

Don Mortensen said, "Because the solution is cloud-based, it will also give staff greater mobility. They'll be able to work offsite and still access the data they need without a problem so they can be more responsive to clients' needs.

"Clients will also benefit because they'll be able to access confidential information in a new digital way, through a secure portal. Most importantly, they'll benefit because staff members will be empowered to provide an even greater level of service which is, ultimately, what the Trinity Alliance Group is all about."

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Don Mortensen
Chief Executive, Stop

Working with DXC Eclipse

Don Mortensen said, "DXC Eclipse helped the Trinity Alliance Group to overcome several challenges that we had to work with. The alliance is made up of three agencies spread across the country; DXC Eclipse had worked with other social service agencies in NZ and therefore understood the political and cultural context of the not-for-profit environment. The DXC team was extremely competent and understood our needs, which was a great value-add, and meant the project ran extremely well. The team listened to us, and they were easy to work with. DXC Eclipse was responsive and flexible, and everyone knew what they were doing so we trusted them and that worked wonders for the success of this project."

Why DXC Eclipse?

DXC Eclipse, a practice within DXC Technology, helps enterprise and mid-market companies accelerate digital transformation, solve business challenges and deliver intelligent solutions that make a difference for clients, employees and partners. We believe in delivering expertise, project transparency and excellent customer service in every engagement.

With team members in North America, EMEA, Asia and APAC, DXC Eclipse is uniquely positioned to deliver Microsoft Dynamics 365, ERP, CRM, business process, analytics and collaboration solutions to clients across the globe. The largest independent Microsoft Dynamics partner in the world, DXC Eclipse serves more than 4,000 clients across multiple industries. The practice delivers services and solutions that positively impact our world today and into the future.

About DXC Technology

DXC Technology (NYSE: DXC) is the world's leading independent, end-to-end IT services company, helping clients harness the power of innovation to thrive on change. Created by the merger of CSC and the Enterprise Services business of Hewlett Packard Enterprise, DXC Technology serves nearly 6,000 private and public sector clients across 70 countries. The company's technology independence, global talent and extensive partner network combine to deliver powerful next-generation IT services and solutions. DXC Technology is recognised among the best corporate citizens globally. For more information, visit www.dxc.technology.

April 2019