



RSL DefenceCare
improves veteran support
services with
Microsoft Dynamics 365

CUSTOMER
RSL DefenceCare

LOCATION
Australia

INDUSTRY
Not for Profit



Challenge

- Limitations delivering single customer view
- Better understanding of services utilised and customer journey



Solution

- Microsoft Dynamics 365 Customer Service
- Cloud-based customer relationship management (CRM) solution
- Ease of integration with Office 365 and familiar user interface



Results

- Real-time data and meaningful insights on service outcomes
- Automated processes and introduced robust data management and analytics
- Improved management of payments and receipts



RSL DefenceCare improves veteran support services with Microsoft Dynamics 365

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— Raj Nair
Chief operating officer
RSL NSW

Challenge

RSL DefenceCare (DefenceCare) is a charity and not-for-profit organisation helping Australian veterans and their families manage through injury, illness or crisis with help around claims, advocacy and well-being. Many veterans live with post-traumatic stress disorder (PTSD) and other physical and mental health conditions and are at risk of financial hardship. Across the state of New South Wales, DefenceCare customers access services by phone, email and the 350 RSL NSW sub-branch locations.

Veteran customers access a range of different health, legal and financial services provided by DefenceCare. DefenceCare wanted a fast, 360-degree, evidence-based view of customers to better understand the mix of services used and the outcomes each person achieved during the course of service.

The team also needed real-time access to robust analytics to better guide employee decision-making on how best to support customers.

The existing enterprise resource planning (ERP) and customer relationship management (CRM) systems had limitations in delivering a single customer view and were used primarily to manage customer information, such as contact details and brief information on services delivered to veterans and their families. The platform lacked functional capabilities to capture the customer journey, generate analytics and share outcomes achieved during the course of service.



The solution gave the team easy access to real-time data and meaningful insights on service outcomes to make better decisions when helping customers.

The system also had a consistently low adoption rate by employees. It was complex to use and the information in the platform wasn't trusted, so teams created manual workarounds to help streamline workflows, such as using spreadsheets to store and report information. This introduced points of risk for veteran care and increased the likelihood of errors from employees using information that was rapidly outdated and not universally accessible.

Raj Nair, chief operating officer for RSL NSW, says, "DefenceCare employees often work with vulnerable veterans, who are suffering physical or mental trauma. The existing system was complex and time-consuming to use, had disconnected data and there was no single customer view. That meant business processes were slow for employees, which frustrated customers and that the full range of services to comprehensively care for veterans wasn't easily available. We also felt the unique nature of each customer's situation meant that multiple customer journeys were necessary to offer proper support, which the existing system was unable to deliver."

Solution

Partnering with the DXC Practice for Microsoft, the DefenceCare team chose Microsoft Dynamics 365 to replace their existing systems. A cloud-based solution, Microsoft Dynamics 365 was selected because of its flexibility to create different customer journeys, ease of integration with Office 365, familiar user interface and SharePoint for seamless document management. Microsoft's common data service was another compelling decision point, because of

its ability to quickly and easily integrate information for use between different applications, including generating analytics and reporting.

"DefenceCare partnered with DXC because of its history and experience delivering successful Microsoft implementations of all sizes. The DXC team take time to listen, learn and understand an environment before suggesting solutions that meet immediate requirements and anticipate future requirements. The team don't take a 'cookie-cutter' approach or force a technology solution to a problem," says Nair.

DefenceCare and DXC teams worked closely together to understand the end-to-end intricacies of the existing solution and how to improve processes with the new solution. The outcome was a comprehensive scoping document that defined a common strategic focus for the business on ways to improve services and processes, define and monitor key performance indicators (KPIs) and better engage customers to support them in achieving beneficial outcomes.

"DXC consultants brought us invaluable insights from other industries, which helped accelerate the implementation by introducing solutions to problems we didn't realise were possible. The consultant's experience meant they could educate the organisation on alternative ways of looking at, and solving, problems, which helped enormously with change management," says Nair.

Outcomes and benefits

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The DefenceCare team rapidly experienced benefits following implementation. The integration delivered by the new Microsoft Dynamics 365 Customer Service solution automated many work processes, removed out-dated processes and introduced robust data management and analytics. The solution gave the team easy access to real-time data and meaningful insights on service outcomes to make better decisions when helping customers.

“The Microsoft Dynamics 365 solution transformed visibility into business performance and customer interactions and introduced valuable operational efficiencies. We realised almost 70 per cent of customer interactions are the same, requiring far fewer customer journeys than we originally assumed. The team’s ability to help customers improved because they gained a 360-degree view of each customer and were able to offer advice based on evidence-based data. And, the executive teams had transparency into operations, processes and customer data,” says Nair.

The new solution let DefenceCare easily and quickly manage customer leads, contacts and account profiles.

The system automated and streamlined manual processes to manage grants, appeals and marketing strategies. Automation across financial systems let DefenceCare improve management of payments and receipts by removing manual entry processes. And the customer experience of engaging DefenceCare was fast, easy and meaningful in accessing valuable assistance services.

“The ability to use data more effectively across the organisation made our team much more proactive when helping customers because data drives decisions. The team genuinely believe in their ability to help customers because they use data-based analytics to show customers how to realise positive personal outcomes. The customer experience improved because we can deliver the right help to veterans and their families quickly and easily. And, with such a robust core system in place, we’re confident we can manage just about any future business evolutions,” says Nair.

About RSL DefenceCare

RSL DefenceCare is a charity and not-for-profit organisation helping Australian veterans and their families in times of injury, illness or crisis. Services are free of charge and include assistance with Department of Veterans' Affairs claims, advocacy at the Veterans' Review Board, counselling, support during a crisis or the death of a loved one, and financial assistance. These services are part of

RSL DefenceCare's welfare support. RSL DefenceCare can help from the time a member first joins the Australian Defence Force and continue this help throughout their life whenever they need a hand and can also help family members when they are in need.

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