



Social services agency  
group manages client  
data with Dynamics 365  
Customer Engagement

CUSTOMER  
**Social Services Agency Group**

LOCATION  
**New Zealand**

INDUSTRY  
**Public Sector / Not-for-profit**



## Challenge

- To find a system that can facilitate real-time data collection
- Need to provide both outcome reporting and better service management
- To accommodate staff working in a mobile way, allowing access to data on a range of different devices



## Solution

- Microsoft Dynamics 365 Customer Engagement
- Integration with existing systems including Microsoft Office as well as industry-specific clinical tools



## Results

- Ability to collect national data, creating new opportunities for international research
- Greater confidentiality, efficiency and accuracy
- Access to data anywhere, anytime enables increased responsiveness to clients' needs



## Social services agency group manages client data with Dynamics 365 Customer Engagement

“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.”

— Spokesperson for social services agency group

### Challenge

A number of not-for-profit social services agencies work in the harmful sexual behaviour (HSB) sector. These organisations work to reduce the incidence and impact of harmful or problematic sexual behaviour on communities in New Zealand. Three of these agencies have formed a group to work together in terms of their relationship with government agencies that fund their work, sharing resources and practices to provide a national service.

These 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.

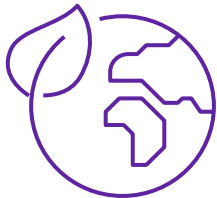
Manual processes make it difficult to retrieve and analyse information

and the extreme sensitivity of the information they deal with necessitates a strong security posture to protect that information. Furthermore, the government funding agencies they report to require outcomes-based reporting to make decisions around resource allocation and ongoing financial support.

A spokesperson for the group said, “We’re moving towards more outcome-focused results, so our agency 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 agency group has





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limited IT resources. The group therefore needed to work with a strong technology partner that could guide it through the process.

## Solution

The 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.

The spokesperson 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."

To implement the solution, the agency group selected DXC Technology. A Microsoft Gold Partner, DXC Practice for Microsoft helps enterprise and mid-market organisations to digitally transform their business and move to the cloud.

## 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 them report to stakeholders nationally and use that data for international research as well.

The spokesperson said, "The success of this project will unlock new opportunities for our 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.

The spokesperson said, "Digital transformation will let our agencies 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

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platform, Outlook. DXC 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.

The spokesperson 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 our agency group is all about.”

## Working with DXC

The spokesperson said, “DXC helped our agency group to overcome several challenges that we had to work with. DXC had worked with other social service agencies in New Zealand 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 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.”

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