

CASE STUDY



ABOUT THE ORGANIZATION

Indiana University Health Physicians (IUHP) is one of the fastest growing, most complete multi-specialty physician groups in the state comprised of the most comprehensive network of primary care and specialty physicians. With more than 1500 board-certified or board-eligible physicians, 250 advanced practice providers and 1,800 staff members at 200 locations statewide, the physician group provides patients with the most innovative treatments and latest technologies offering more treatment options than anywhere in the state.

CHALLENGE

With the many changes in healthcare regulation, and pressures in keeping healthcare providers and professionals up-to-speed on the latest technology, IUHP's training and support team, who visit multiple physician practices on a daily basis, needed a better way to manage their technology training and support efforts throughout the state of Indiana.

Managing the communication, training activities, contact information and follow-up had become nearly impossible. The team was using email, Excel spreadsheets and Microsoft Word to manage their on-site training activities, which became very unproductive and ineffective. The team needed a better way to manage their clinic account and contact data, overall interactions and keep everyone better coordinated. "We could see that as our organization would grow our system of using Excel spreadsheets and Microsoft Word wasn't a sustainable model," says Jim Gordon, Manager, EHR Training and Support at IUHP. "We needed to find a way to manage and track everything and the solution was Microsoft Dynamics CRM."

Overall, IUHP needed a solution that would:

- + Provide a centralized database to consolidate information
- + Allow greater access and visibility into data for better tracking of activities and follow-ups
- + Improve team productivity and streamline communications
- + Provide greater insight into training needs and student feedback

SOLUTION

As the need for training and adoption on key health care technologies such as Electronic Health Records (EHR) became ever increasing, so did the need for better management of the training and support efforts for their large number of physician groups and clinics. The IUHP team knew they needed a cloud-based CRM solution due to the mobility of the staff and evaluated several different cloud CRM solutions. After considering all the options, they decided Microsoft Dynamics CRM online would be the best fit and could grow with their organization. The organization chose Microsoft Dynamics CRM because of the familiarity their team has in working with other Microsoft Office applications including Outlook, as well as the skill set PowerObjects brought to the table. They were impressed with PowerObject's CRM expertise, healthcare experience, and ability to understand and deliver a solution that fit their needs.

INDIANA UNIVERSITY
HEALTH PHYSICIANS
INCREASES EHR
TRAINING EFFICIENCY
AND ADOPTION
WITH DYNAMICS
CRM

CHALLENGE

Indiana University Health Physicians needed a CRM solution to help manage their technology training and support efforts for their physician practices and clinics.

SOLUTION

Microsoft Dynamics CRM and PowerObjects PowerPack Add-ons

BENEFITS

- + Provide a centralized database to consolidate information
- + Allow greater access and visibility into data for better tracking of activities and follow-ups
- + Improve team productivity and streamline communications
- + Provide a greater insight into training needs and student feedback

The logo for PowerObjects consists of two white circles of decreasing size stacked vertically, followed by the company name 'POWER OBJECTS' in a bold, sans-serif font.

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PRAISE FOR POWEROBJECTS

“Thanks to PowerObjects and Dynamics CRM, we have seen a big increase in productivity as well as overall effectiveness and communication throughout the organization. Microsoft Dynamics CRM has been a big win for our team and we look forward to expanding it to other areas of our organization as we continue to grow.”

JIM GORDON

Manager, EHR Training and Support
IUHP

BENEFITS

One of the greatest benefits IUHP realized with the solution was the ability for the team to access a centralized database of information. Before Dynamics CRM, they were using a myriad of databases to manage their contact information and the activities associated with them. Now the organization has an integrated Dynamics CRM system that everyone can access and gain valuable information from. The training team is on the road every day, and having the ability to login and get the information needed to do their jobs effectively has been invaluable.

Through the dashboards and reporting set-up in Dynamics CRM, not only does each team member have greater access and visibility into the data, they also can pull activity reports quickly and easily. From a team and clinic perspective, the reports show real-time status of each account and provide better visibility into the activities and follow-up that needs to occur. With this information at their fingertips, they can better manage their team activities and service the physician accounts with greater accuracy and insight. “Dynamics CRM has great flexibility. Even our non-technical people are able to create fields, forms, and custom lists quickly and easily—and this has been very helpful for us,” Gordon says.

With Dynamics CRM in place, many of the manual activities in organizing and communicating with physician offices and clinics have been reduced. The team is much more coordinated and spends far less time making phone calls and looking for data. Many of the team members cover a large territory, and now their days are more productive because they are focused on proactively meeting the training and support needs of their accounts verses worrying about if anything has fallen through the cracks.

Microsoft Dynamics CRM has also provided additional knowledge and intelligence on the training needs as a whole. Through the reporting in Dynamics CRM, IUHP can better understand where they should focus their training and education, if there are gaps or needs to be met, as well as see overall technology trends throughout the organization. With PowerObjects’ PowerPack add-on, PowerSurvey, gathering student feedback on training is much more effective. “When we want to create a survey we use PowerSurvey to track all the feedback in CRM and we can tie this back into our training plans. We also get much more accurate feedback since all survey results can now be confidential instead of having our students fill out a sheet of paper,” says Gordon.



ABOUT POWEROBJECTS

Established in 1993, PowerObjects is one of a handful of organizations recognized as a leader in delivering Microsoft Dynamics CRM/xRM solutions to customers. PowerObjects fully embraces the power of customer choice and offers hosted, on-premise and online CRM deployment options.

PowerObjects provides CRM solutions to businesses and non-profit organizations in multiple industries including healthcare, life sciences, insurance, financial services, publishing, distribution, manufacturing and professional services.

AWARDS + RECOGNITION

2012 + 2013
Microsoft Dynamics Partner of the Year

+++

2011 + 2013 + 2014
Inner Circle for Microsoft Dynamics

+++

2009 + 2010 + 2011 + 2012
Inner Circle for Microsoft Dynamics

+++

3
Convergence Customer Excellence Awards

+++

GOLD + SILVER
Inner Circle for Microsoft Dynamics

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BENEFITS |CONTINUED|

In terms of regulatory requirements, Dynamics CRM has made the process of tracking and ensuring standards are met much easier for IUHP. “With Health-care Reform in place, doctors are being tracked and measured on how well they use medical records and how they use computers to manage a person’s chart. Having a system that can be adapted to keep up with changes in the industry is very beneficial. Without Dynamics CRM, our team wouldn’t be able to track the extensive amount of information needed. We have found that nothing outside of Dynamics CRM can do a better job,” Gordon says.

As the training and support team at IUHP has continued to expand its use of Microsoft Dynamics CRM, user adoption has steadily increased due to the familiar and intuitive Microsoft interface. “Dynamics CRM is easy to learn on the fly and it’s a very flexible system. Instead of using our industry’s system, we use Dynamics CRM because it’s actually more effective for what we need to do and much easier for our users to adopt,” Gordon adds.

With PowerObjects and Microsoft Dynamics CRM, IUHP has an easy-to-use, fully scalable system tailored to their organization’s unique needs. “Thanks to PowerObjects and Dynamics CRM, we have seen a big increase in productivity as well as overall effectiveness and communication throughout the organization. Microsoft Dynamics CRM has been a big win for our team and we look forward to expanding it to other areas of our organization as we continue to grow,” says Gordon.



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