

## ABOUT THE ORGANIZATION

The Virtual Fracture Clinic (VFC), developed and established by Advanced Practice Physiotherapist Lucy Cassidy and Consultant James Gibbs, is a virtual follow-up clinic for patients with simple fractures or soft tissue injuries that allow them to receive their post A&E care online.

The Virtual Fracture Clinic platform allows VFC to manage patients who have simple fractures and soft tissue injuries virtually, without the need to visit a clinic in person. The platform manages patient information to guide patients in treating their acute injuries. Initial diagnostic medical appointments can be made by telephone and are supported with online resources including YouTube videos and email templates.

VFC supports patients by bringing the information to patients recovering at home via telephone and online resources, not only to give them a diagnosis that they would have originally had in a clinic, but also to give them their first six weeks-worth of rehabilitation exercises to access immediately.

## SITUATION

VFC was initially working with a different CRM partner, but after that partnership fell through, VFC was referred to PowerObjects by an internal Microsoft contact. “She just said, ‘These guys will be great for you,’ and we were like, ‘Great, okay,’” says Lucy Cassidy, Advance Practice Physiotherapist. “It was pretty simple.”

In addition to Microsoft Dynamics 365, VFC uses a CRM portal to manage referrals into the system and to allow patients to access their rehabilitation plans and their diagnosis and chart outcomes with regards to the progression of their exercises.

## CHALLENGE

Before Dynamics 365, VFC was utilizing tools found in the wider Microsoft stack, with a heavy reliance on Microsoft Excel and Microsoft Outlook. The VFC communication team set up an online referral form that would be downloaded and filed to Excel daily. They also managed their patient tracking via Excel. “Excel wasn’t really ideal when you’ve got more than one person working on it,” expresses Cassidy. “It’s also not great because if you accidentally delete a cell, that information is gone forever and you don’t know sometimes that you’ve even deleted it.”

For patient information, VFC used Outlook templates to email patients links to videos and PDFs for written documentation. For patients who did not have an email, however, this process was completed via mail, which meant VFC was utilizing multiple platforms. “I was really, really keen to get a CRM system so that we could accurately track everything that we do,” says Cassidy. “Our process before was clunky, and it’s much better to have one portal that we can build that hopefully in the future other hospitals can also access and use that same information to reduce any replication of work.”

VFC wanted a CRM platform to be the model adopted by other hospitals as best practice. “Other hospitals are saying, ‘Hey, what you’re doing is really cool. We want to do that,’” says Cassidy. “We found that if we had this platform it would mean that the system could be adopted more easily and, for our physiothera-



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LUCY CASSIDY

Advance Practice Physiotherapist  
The Virtual Fracture Clinic

## CHALLENGE | CONTINUED |

pists that are running the Virtual Fracture Clinic, it's easier for them to be able to choose a diagnosis automatically to link the correct protocol to the patients. Less user error using the platform."

## SOLUTION

After looking at several options, VFC decided to go with Microsoft Dynamics 365. "I was just really attracted to the fact that you can configure it to do pretty much anything you like. It's an easy language, it's not coding, which lets us actually make small adaptations ourselves," says Cassidy. "Once it's up and running, we're quite independent with regards to updating our information."

VFC decided to go with an online implementation of Dynamics 365 to make it easier to roll out to other hospitals as a cloud-based service rather than have other hospitals add to their current user licenses.

One of the biggest solutions that VFC is implementing is a CRM portal. The portal is set to launch in 2017 and is projected to manage approximately 100 referrals a week for the first six months. After the imbedding phase, this number is expected to double and VFC will be looking to configure the system to integrate with other hospital software platforms, which will auto-populate patient demographics to result in both time and cost savings.

## A CRM PORTAL IN ACTION

VFC's patient portal works via a referral form process. When a patient is seen in A&E, A&E fill in an online referral form in the portal. This then triggers an email to the patient to welcome them to the portal, explain the VFC history, and introduce them to other resources such as articles and videos. With the portal, before patients have even left A&E, they've already gotten access to resources for managing their injury.

On the following business day, after the orthopedic consultant and the physiotherapist have given the diagnosis in CRM, patients received a second email that says, "Welcome back. Your diagnosis is now live. Click here to log in."

Patient can then log in to the portal to access their personal care plan. Care plans include documents with information about their injuries and videos of exercises they can do at home to help aid in recovery. The first time patients access the portal, they are prompted to give an outcome score that asks them how well they were functioning before the injury.



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## SOLUTION

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## BENEFITS

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## A CRM PORTAL IN ACTION |CONTINUED|

VFC makes sure to call patients to confirm they were able to log into the portal okay and that they were able to access the information they needed. They also confirm receipt of the diagnosis and the patients are comfortable with the proposed treatment plan. "Say, for example, you've injured your shoulder," says Cassidy. "There are certain pathways for the different injuries. If you have fractured your clavicle, at three weeks you'll get an email to say, "It's time to move on to your next exercises," and then have a shortcut to the URL for that."

Finally, patients receive additional triggered emails after two weeks to review how the service worked for them and again at six weeks and three months with prompts to fill out their outcome scores again so VFC can see how patients are functioning depending on their kind of injury.

### KEY BENEFITS

VFC has seen extensive benefits from their CRM portal, especially on the patient end. "It's a much more polished service. I think if I was a patient and I got a YouTube video, a survey and an email that half the time goes to spam, I don't think I'd have much confidence in the service," says Cassidy. "But for me to be able to go into a branded platform that looks like the NHS, I think does lot for patient confidence in the service."

With the outcome measures, VFC can continue to do ongoing research in terms of specific injuries and recoveries. Since they have all the data stored in CRM, they can continue their research on how virtual models can manage patients with specific injuries as well as chart demographics in terms of reach of patients, age and their interactions.

VFC uses survey to better understand the voice of the customer. "With regards to orthopedics it's really important to know that our patients are getting better from their injuries, so we've set it up so that at day zero they get sent an outcome measure that they fill in as if it was the day before their injury," says Cassidy. "Then, CRM automatically triggers an email to send them that same outcome measure at six weeks, at three months, at twelve months, and finally a survey to collect patient satisfaction on how they feel that the service works for them."

The emails include direct links that take patients to the correct location in their portal. "I like that fact that on the CRM side we can actually measure user engagement. We can see if they are opening the documents that we put in their file. We can see if they're doing their surveys, and we can send prompts or reminders if they're not doing it. I think that that's really great," says Cassidy. VFC uses PowerObjects' suite of PowerPack Add-ons for Dynamics 365, which add functionality to the CRM component. PowerPacks used include:

**PowerEmail:** PowerEmail sends automatic emails based on the triggering of the first trigger emails from a referral. When VFC receives a referral, the first email is triggered by PowerEmail, and then there's a series of email triggers that are set up for the surveys and the outcome measures.

**PowerGrid:** Because VFC receives numerous referrals daily, they needed something that would let them view all referrals instead of having to open every referral individually to go through and look at the cases. PowerGrid brings the referrals into a grid format so VFC can view the cells that are relevant to them in order to make a diagnosis. Patient information is entered into PowerGrid while a consultant is reviewing a case, without having to go into every individual case.



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## KEY BENEFITS

**PowerWebTraffic:** By utilizing PowerWebTraffic, VFC can monitor how people are interacting or not interacting with the portal.

**PowerWebForm:** VFC uses PowerWebForm to gather patient information including telephone number, email address, and then gives us a diagnosis of the injury and how A&E have treated that injury. Then it asks them for their name and location that they're referring from so that they can track that information. Using PowerWebForm's dropdown boxes to select a diagnosis results in determining accuracy in diagnoses provided.

**PowerAutoNumber:** PowerAutoNumber automatically assigns a unique identifiable number to referrals as they come in.

Virtual Fracture Clinic will see long-term benefits for their Dynamics 365 implementation, including the ability to have junior level physiotherapists working in the service. Since Dynamics 365 is protocol driven, it is easier for users to follow set processes, which results in less room for error. VFC hope to have their platform adopted nationally by the NHS.



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