

# CASE STUDY

## Streamlined document workflows for improved application efficiency



### ABOUT

**besser zuhause** is committed to enabling older individuals, including those in need of care and with limited mobility, to age with dignity by offering affordable accessibility solutions that allow them to lead self-determined lives at home, supported by a team of over 40 craftsmen in Hamburg, Bremen, Hanover, and parts of Schleswig-Holstein.

### CHALLENGE

**besser zuhause** assists customers in the application process for home improvement measures. This support involves the time-intensive task of generating personalized letters and attachments. These case-specific documents are sent via email and traditional mail, requiring a quick and adaptable approach to their creation. These documents must also be easily retrievable and verifiable by the back office team. Previously, **besser zuhause** had used standard document creation tools from Power Platform and Dynamics 365 Customer Engagement, but the complexity of their templates had increased significantly.

### SOLUTION

Acknowledging the urgent requirement for an effective solution to streamline their document processes, **besser zuhause** conducted an extensive research on various alternatives. Ultimately, they opted for DocumentsCorePack as their preferred choice. The integration of DocumentsCorePack resulted in a variety of advantages, significantly enhancing their business operations:

#### 01 ▶ Streamlined Application Process



DocumentsCorePack enables the creation of tailored emails or letters along with their attachments with just a few clicks, followed by easy transmission. Pre-configured One-Click-Actions guide users to the appropriate output document, automatically creating corresponding activities in Dynamics and storing attachments in the relevant customer folders in SharePoint.

## 02 ► Consistency in Document Creation



Document templates were initially defined, tested and continuously improved by a team of six users. Subsequently, DocumentsCorePack was rolled out to all users. Future iterations will transfer additional templates and processes to DocumentsCorePack to guarantee a company-wide coherent document standard.

## 03 ► Time & Cost Savings



The application process has been significantly simplified, reducing the number of clicks required by customer service representatives. Activities are automatically generated in Dynamics 365 for documentation and linked to the relevant processes. User post-processing efforts have been notably minimized since customized letters are now generated for each customer or case. With proper training, designated users can utilize the Template Designer to create and extend templates within MS Word, reducing dependence on IT support from the business department.



## CONCLUSION

In conclusion, **besser zuhause** effectively incorporated DocumentsCorePack into their business operations, resulting in profound enhancements in efficiency, precision, uniformity, cost-efficiency, and client contentment. DocumentsCorePack brought about a significant boost in their document creation and administration procedures, enabling them to allocate resources towards providing outstanding accessibility solutions that surpass customer expectations.

**Are you ready to revolutionize the way you handle your documents too?**



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“ The application process for home improvements has greatly improved at besser zuhause. Users now easily generate documents through One Click Actions in Dynamics, simplifying document creation and editing with low-code solutions. Trained department employees can independently manage templates. DocumentsCorePack seamlessly integrates with Dynamics 365 and provides personalized automation through Power Platform connectors, enhancing besser zuhause's application landscape. ”

**Peter Gründler**, Inhouse Consultant Dynamics 365