

sognos

CASE STUDY

Sognos helps Flourish Australia modernise service delivery with a single Dynamics 365 platform





When care is complex, your service platform should make it simpler

As one of Australia's leading community mental health providers, Flourish Australia supports more than 10,000 people each year across its national network of 70+ sites. With around 900 staff delivering psychosocial services, NDIS supports, and community outreach programs, the organisation depends on accurate information, consistent workflows, and reliable reporting to keep people safe and maintain high-quality care.

For over a decade, Flourish relied on a legacy Client Information Management System. But as the organisation grew and NDIS requirements became more complex, the system began to hold them back. It could no longer provide the visibility, data quality, or operational consistency needed across dozens of services and sites. Flourish recognised that supporting people effectively would require a modern, integrated platform capable of managing enquiry, intake, service delivery, billing, claiming, and funder reporting in one place.



Keeping pace with growth, complexity, and rising reporting demands

How do you maintain visibility across 70+ sites when your core system can no longer keep pace with the scale of your organisation?

Flourish Australia's legacy platform had reached end of life and was struggling under expanding operational and regulatory demands. The introduction of the NDIS brought with it complex financial and billing requirements that the system was never designed to handle. Not only was it outdated, but it also required staff to enter the same information multiple times as participants moved through enquiry, intake, referral, and service delivery. This created a heavy administrative load and increased the chance of errors.

At the same time, the organisation was running more programs – including NDIS, Supported Independent Living, and PHN-funded Commonwealth Psychosocial Support – each with its own data and reporting requirements. These non-standard processes made it harder to maintain data quality, particularly when preparing funder reporting or supporting NDIS compliance. And because enquiry, intake, support delivery, and reporting were managed through separate systems, teams lacked an organisation-wide view of activity.

These challenges made it increasingly difficult for Flourish to operate efficiently and put additional pressure on staff whose focus should be on supporting participants.

“Our previous system had simply reached its limits. It could no longer support the depth of information, reporting, and visibility we needed. We wanted a modern platform that would reduce manual work, strengthen data quality, and support our teams to stay focused on people rather than administration.”

– SUSAN MCCARTHY, CHIEF OPERATING OFFICER, FLOURISH AUSTRALIA



A unified Dynamics 365 and Power Platform solution

The goal was clear: create a single, reliable platform that brought the full service lifecycle together in one place.

Flourish partnered with Sognos to design and implement a Dynamics 365 and Power Platform solution that would replace the legacy environment and form a foundation they could build on for years to come. Delivered across structured phases, the project required close collaboration across both organisations to ensure the system reflected real operational needs.



Highly configurable modules for enquiry, intake, service delivery, and claiming

To bring processes together, Sognos implemented Dynamics 365 modules covering enquiry management, intake, consent, safety, support delivery, and NDIS billing and claiming. For the first time, these functions sat within a single system rather than across disconnected tools and manual workflows.



Custom program profiles and assessment tooling

Sognos supported Flourish to deliver its wide range of psychosocial support programs, each with its own requirements. This included building custom program profiles and assessment tools so the organisation could adapt as programs evolved without relying on workarounds.



Integrated reporting and insights for funders and leaders

Reporting was significantly strengthened through SSRS and Power BI. Managers now have clearer, real-time visibility of caseloads, service delivery, and operational trends. This reduced the time previously spent extracting and assembling data from multiple systems.



End-to-end system integrations

To streamline operations, the platform was integrated with T1-HR, T1-Finance, the NDIS PRODA portal, and Emplive. These integrations improved payroll, rostering, finance, and claiming processes while reducing the need for duplicated data handling.

“Sognos approached the project with a strong understanding of our sector and operational realities. The scale of change was significant, but the collaboration and the structure they brought helped us move through each phase confidently.”

– **SUSAN MCCARTHY, CHIEF OPERATING OFFICER, FLOURISH AUSTRALIA**

Delivering real improvements across people, processes, and reporting

When technology begins to reflect the way people actually work, improvement shows up quickly. From the very start, the platform has driven meaningful progress in consistency, visibility, and operational efficiency.



Greater visibility for managers

Managers now have real-time dashboards showing participant activity, service delivery, and operational trends. This replaces manual reporting effort and gives leaders a clearer picture of what is happening across services, supporting faster and more informed decision-making.



More consistent, streamlined workflows

Workflows for enquiry, intake, safety, support delivery, and claiming are now unified across sites. Staff no longer need to duplicate data or rely on manual workarounds, helping improve both consistency and data quality.



Enhanced NDIS claiming and reduced manual effort

Integration with PRODA and clearer visibility of claim errors mean issues can be addressed earlier. This reduces repeated work and eases pressure on teams managing one of the organisation's most complex administrative processes.



Rapid organisation-wide adoption across 70+ sites

More than 600 staff use the system daily, a strong early sign for an implementation of this scale. As teams become more confident with the platform, adoption continues to grow.

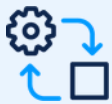
Key outcomes



Improved organisational visibility, enabling leadership to view service activity more clearly across programs.



Consistent processes across enquiry, intake, delivery, and claiming, supporting a more standardised way of working.



More reliable NDIS claiming operations, supported by system integration and better transparency.



Reduced administrative burden and less repeated data entry, giving staff space to focus on meaningful client work.



Strong early user adoption, with daily usage continuing to increase across teams.



One consolidated platform for operational and reporting needs, replacing multiple disconnected systems.

“The visibility we now have across our services is something we simply couldn’t achieve before. Even in these early stages, the impact is significant for our teams and our managers.”

– SUSAN MCCARTHY, CHIEF OPERATING OFFICER, FLOURISH AUSTRALIA

Creating a foundation that supports long-term improvement

With the foundations in place, attention is now shifting to refinement. Flourish and Sognos continue to work on planned enhancements to further strengthen the platform, including improvements to intake and delivery workflows, ongoing optimisation of NDIS claiming, and exploring opportunities to incorporate Copilot Studio where appropriate.

The objective is simple: ensure the platform evolves alongside the organisation and continues to support safe, high-quality service delivery.

“This is a long-term platform for us. The foundation is solid, and we are continuing to refine and enhance it as our organisation grows.”

– SUSAN MCCARTHY, CHIEF OPERATING OFFICER, FLOURISH AUSTRALIA

Advice for organisations modernising complex service systems

Looking back, Susan emphasised that success came from clarity, collaboration, and early operational involvement. For organisations considering a similar transformation, her advice is straightforward:

“Be clear on your requirements, invest in strong project management, and involve your operational teams from the beginning. Our success came from the partnership approach between our internal team and Sognos, and from having the right people engaged throughout. Sognos brought a structured approach with clear phases, practical testing, and a delivery method shaped by the realities of healthcare and community mental health.”

– SUSAN MCCARTHY, CHIEF OPERATING OFFICER, FLOURISH AUSTRALIA

That partnership approach was embedded throughout the project. From early consultation through to detailed testing and training, Sognos and Flourish Australia worked closely together – engaging staff across programs to ensure the solution was shaped by real operational needs. This collaborative way of working was essential to building a system that truly supports frontline delivery.

For Flourish Australia, the new Dynamics 365 and Power Platform environment is more than a system replacement. It is a modern, reliable foundation that supports safe, consistent, and person-centred mental health services across the country.



Better care starts with better systems – that's where Sognos comes in

Sognos helps organisations delivering complex, people-centred care modernise the way they work. We build Microsoft-native solutions for mental health, disability, aged care, community services, and high-risk field environments – improving visibility, strengthening consistency, and reducing the admin load on frontline teams.

We design around real-world practice, working side by side with leaders, practitioners, and subject matter experts to connect the full-service lifecycle in one place – from intake and assessment to service delivery, claiming, and reporting. Mobile-first, simple to use, and dependable under pressure.

With teams across Australia and New Zealand, we support every stage of transformation – discovery, design, implementation, optimisation, and long-term evolution.

Our focus is simple: **Healthcare first. Field services always. AI at the centre.**

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Let's Talk

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