

100% Adoption Rate for Health Insurance Provider's Digital Transformation

This healthcare client provides health insurance products and related services to more than 100,000 members in the Western U.S. The company's insurance products include managed care programs for businesses and individuals, as well as supplemental dental, vision, prescription drug, and Medicare coverage.

Challenges

- The client previously relied on Act! as the CRM system of record for its sales team, however Act! was falling short of providing critical insights into sales activities.
- Their provider relations team members were in need of a system to support the tracking of activities as they had previously been manually tracking communications. Without a transparent system of record to track the status of issues, they realized they were missing the opportunity to view agent productivity, issue trends, and problem providers.
- Their marketing team saw the potential for e-mail templates for sales people to send. By using a robust CRM, marketing would have the opportunity to track campaign results to improve ROI. Marketing was challenged to increase the precision of outbound messaging to ensure they do not miss touchpoints with prospects, customers, and physicians.
- For Marketing, the system enabled the team to track campaign participants, activities, and results. The team has put email functionality to use with mass emails, customizations, and the ability to make quick changes on the fly.
- The solution also included Outlook integration as well as CTI Integration, as well as data migration for the Provider Relations team. The project also utilized Silverline's Lightning Component: Jumbotron, which displays important information like company news, events, and updates on any page.

Solution

- The client partnered with Silverline to implement Salesforce Sales Cloud built on the Lightning platform across its sales, provider relations, and marketing teams to provide a system of record with complete visibility into company activities utilizing basic out of the box functionality.
- For Sales, the system supported three unique process of selling to individuals, small groups, and large groups. The primary focus was on tracking activities for annual campaigns, renewals, and medical applications.
- For Provider Relations, the system supports case management and activities. The team now has a one-stop-shop for client information.
- By implementing Salesforce for sales, provider relations, and their marketing teams, this healthcare provider is empowered with a system of record for visibility into team activities. Managers have seen insight into productivity with the ability to view interactions in over 2,000 accounts in the first half of the month through tasks and activities.
- The client was able to double its retention of members who are aging out of their current products at age 26 (dropping off guardian plan) and 65 (becoming eligible for Medicaid) by using Salesforce to identify upcoming birthdays to keep those members blue.
- The solution has seen a 100% adoption rate among employees company-wide and 50% mobile adoption with considerations for need of mobile-use.
- Medicare marketing campaigns were previously executed by a third party, the solution has enabled them to develop a plan for bringing it in-house with the use of Salesforce, eliminating third party resources and costs.

About Silverline

Silverline has real-world expertise in the Healthcare industry, including industry sub-segments such as Provider, Payer, Medical Device, and Life Sciences. We combine strategic planning, implementation, and ongoing support to help clients realize continuous value with the Salesforce platform. We also offer CalendarAnything, a popular AppExchange application, and accelerators. To find out more, contact us at healthcare@silverlinecrm.com.