

Global healthcare insurance group boosts customer experience with membership management and mobility

Industry

Insurance / HealthCare

Products & Services

Salesforce

Implementation Partner



www.crm.it.com

A leading health care insurance company in the United States and a leader in healthcare services globally .

Challenges

- De-centralized sales processes and system to manage larger/nationalized accounts
- Complex customer on-boarding experience including managing customer contacts
- Membership activity management including deeper understanding to customer pattern, decision process with analytics & reporting
- Provide mobility access to improve field productivity and customer engagement

Solution & Benefits

- Entire solution built and implemented on Salesforce platform
- Provide mobile access via Salesforce1 for agents to capture all membership details
- Automated process across the membership activity leveraging process builder. Implemented the organization security model to comply with regulatory requirements and access controls based on role & responsibilities and hierarchies.
- Build tools and automated system to extract, cleanse and load data from existing system to new system
- Build reports and dashboards for both operational and executive level
- Setting up the Pilot system for implementing Wave Analytics to improve quality and insights on the current reporting system