

A Leading Health Insurance Provider Improved Its Sales Revenue Through A Custom Salesforce Implementation

One unified platform for the entire sales process



The Client

The client is a leading health insurance provider in the United States, aiding people through numerous health insurance policies.

The Need of A Single System To Remove Process Bottlenecks and Improve Sales Team's Efficiency

The client had several functional applications including some legacy ones, to assist the sales team in their day-to-day operations including account management, administration of contacts, and selection and processing of insurance plans. These applications were disconnected from each other, leading to a lack of one unified system with comprehensive and cohesive view of the data. Other challenges include:

- **Absence of Single Customer View:**

Multiple application-led system failed to provide a single view of the customer data and the insurance plans which restricted the sales team to provide best in class sales experience including solving queries on insurance plans of customers. This had led to lower satisfaction among the members.

- **Inefficient Sales Operations:**

The multiple sales enablement applications impacted the operations of the sales reps as they had to repeatedly shuffle between the multiple application windows, and were not able to view real-time information of a customer details and its historical interaction data at one place with analytics. The sales team also were unable to capture their sales efforts efficiently to provide a detailed sales reports to the leadership team.

- **Inefficient Claims Management:**

Due to disconnected applications, it was very difficult to manage claims seamlessly



Disparate applications creating more bottlenecks



Inability to access and utilize historical customer information in Sales Process



Absence of one unified platform to produce a holistic view of the entire sales operation for leadership

The Solution

Implementation Of All Purpose Holistic Sales System

■ Implemented A Unified All Purpose Salesforce CRM System

Damco worked with the client to understand their business needs and challenges to design a customized Salesforce solution that enabled the client to visualize the entire sales process under one system and enabled approvals in one place. During the implementation, some of the Salesforce objects used included accounts, contacts, opportunities, claims, quotes, products and price books.

Seamless data migration was done from legacy application systems to Salesforce to create the unified view of the customers in real-time.

■ Developed Custom Visualforce Pages

We deployed custom sites developed on Visualforce that delivered a personalized experience where customers can view and choose insurance plans of their choice.

■ Holistic Data, Reports and Dashboards For Leadership Team

We developed reports and dashboards that provided key insights such as sales team KPIs, demographics of customers, accounts, and much more to leadership for insight-based decision making.



The Benefits

A Modernized Sales Platform That Provides 360° View of Customers and Business

- ▶ Single web-based Salesforce application for customer data management, sales activities and claims management led to higher performance of activities by users related to premiums, insurance plans, renewals, and claims management.
- ▶ Sales representatives delivered improved customer experience including solving their queries efficiently without any delays because of the availability of historical information of customers and insurance products in real-time.
- ▶ One holistic reports and dashboards to track all the relevant actions related to sales, revenue, and churn by product and people wise.



Know How Salesforce Can Inject Efficiency In Your Sales Team

Book A Free Salesforce Consultation

About Damco

Damco Solutions is a strategic Salesforce partner and holds consulting and technology expertise across the Salesforce ecosystem. We help businesses boost productivity and realize the true potential of their Salesforce platform to maximize their investments. Contact us to learn more about the services and solutions that can help transform and build a customer-centric digital-first organization.

Contact us for more information on our Salesforce services:

+1 609 632 0350

info@damcogroup.com

<https://www.damcogroup.com/salesforce/>