

Showcase Project –Integrating Healthcare CRM Platform into the Ultimate Customer Experience while Saving Millions

G-TECH is an award-winning national provider of Talent Management and innovative Technical solutions. For more than 30 years, we have consistently delivered specialized professionals, services, and products to our clients to enhance business operations and transform organizations.

Background: A leading healthcare insurance company purchased an Enterprise Salesforce CRM platform in an effort to support multiple department units. Unfortunately, the platform was not fully integrated; member data was disparate or not shared across all units. Onramp access with new members was limited to two units. The data roadmap was not available and the system was not compliant with healthcare data/member standards. The headaches only increased as installation costs exceeded budget.

Approach: Our Team's Subject Matter Expert (SME) was retained to lead the strategic efforts in extending the CRM/Salesforce Enterprise to include Marketing, Sales, and IT. We also provided additional digital expertise to assess and assist with developing the client's overall enterprise roadmap and customer engagement strategy. This integration allowed for the consolidation of all solutions and data into one permissioned, concentric marketing platform. The purpose was to help solve the 360-degree member engagement and develop the critical 1:1 relationship with its members in real time.

Solution: Our SME led the enterprise-wide solution through collaboration across the various lines of business and the IT department, resulting in the integration of a single compliant enterprise member data center and master repository. Our SME also managed the vendors and implementation of the CRM, resulting in significant cost savings and real-time customer engagement.

Results: The client implemented an enterprise-wide digital platform that is a key focus for the company's overall Customer Engagement, customer retention and 1:1 member engagement strategies for today and into the future. The client can now leverage all digital platforms and market to all members for their "next best message" based on predictive real time behaviors. Further, the strategic approach resulted in a multimillion dollar savings for the client.