

CRM REQUIRES COMPLEX EXTERNAL INTEGRATIONS

The client provides healthcare insurance services through more than 50,000 brokers who serve nearly 60,000 employers and more than 6 million employees. The company has become the nation's recognized leader in developing and offering innovative technology, health benefit plan models, and sophisticated health benefit products and services for individuals, families, and employers of all sizes.

The Challenge

In order to participate in the healthcare exchange market created by the Affordable Care Act, the client was developing a new online healthcare enrollment platform. The company also needed a new CRM system that would allow the call center staff to quickly assist any current or potential customers who contacted the call center with questions regarding enrollment or coverage.

Development of the new CRM system was complex because the call center staff needed simultaneous access to data from multiple sources, including the state and federal exchange platforms, some of which were still underdevelopment; the information the customer had provided on the client's online enrollment platform; and a complete history of all contacts with the call center. This required the development of highly secure integration points with multiple internal and external systems.

Further complicating the project was the ongoing legislative activity at both the state and federal level that frequently resulted in changing requirements for the CRM during the development phase. Despite the changing requirements and the need to interface with other systems that were also currently under development, the Technossus team faced a hard deadline, as the new CRM had to be completed and operational before the new healthcare exchange was launched.

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The Technossus Solution



In addition to handling a significant portion of the overall exchange platform and development, the Technossus team was solely responsible for the design, development, and launch of the new CRM.

The Technossus team designed an innovative authentication process that allowed the call center staff to simultaneously access a customer's call center history, enrollment qualification data, and all the information they had entered into the client's online enrollment platform. This included the pertinent personal data, what steps they had completed in the enrollment process, and the insurance plan they had selected. Enabling the staff to immediately answer any question regarding a customer's healthcare plan options and eligibility without leaving the CRM significantly increased the call center productivity.

The new CRM included reporting features that provided the call center management team ongoing insight into the different types of consumers who enrolled in health care plans through the exchange, what insurance packages they selected, and the progress their customers were making in the enrollment process.

The Result

Technossus developed the CRM platform, integrated it with the required data from state and federal platforms, and created the new authentication process while working in parallel on the development of the client's healthcare exchange platform. The two projects involved hundreds of IT professionals working together to build out the highly complex solution. The developers were working under high pressure to meet an ambitious deadline, but the combination of inventive system design, disciplined development processes, and exceptional project coordination resulted in a smooth on-time launch of the CRM in tandem with the healthcare exchange platform. While many other exchange providers failed to "go live" by the original deadline, the client successfully rolled out their new system, complete with a fully equipped call center staff using a CRM uniquely designed to meet the needs of the new healthcare exchange customers.

\$37B

CRM market size

91%

Companies with more than 11 employees now use a CRM

3x

Sales reps that use a mobile CRM are more likely to achieve their sales quota