Creatio

Health e fx

Health e(fx), the largest SaaS-based compliance and reporting solution on the market for Administrators, simplifies and supports strategic decisions around healthcare compliance and reporting, benefits, and workforce management. Health e(fx) is the largest ACA solution provider, boasting 22.5 million client members and a 97% client retention.

PRODUCTS:

Sales Creatio, Service Creatio, VOIP Connector for Creatio cloud, self-service portal

INDUSTRY:

High-Tech

REGION:

USA

CHALLENGE:

To align and build a consistent and efficient process through the client life cycle — from initial sales efforts, through onboarding, implementation and ongoing support.

Health e(fx)'s Requirements:

- Single view of a client
- One platform for sales and service
- Call center integration
- Ability to create custom workflows
- Deploy service out of the box
- Data migration from sales and support applications

BUSINESS OUTCOMES:

30% Operating costs reduced by 30%

17% Increased amount of contract renewals by 17%

Increased customer satisfaction thanks to seamless alignment

SOLUTION:

- A unified platform that accelerates sales, and customer service and collaborates them into a single ecosystem, providing the full data integrity and seamless customer journey and oversight.

- Implementation of out of the box service.

- Call center integration (incoming call processing, client identification, new client registering, new equipment registering, tickets (calls) processing including technical and non-technical notifications, tickets (calls) escalation, etc.)

- Development of email distribution list to manage user questions for email case generation

- Lead generation from multiple entry points (Hubspot API and email generation)

- Self-service portal for clients

- Reimplementation of Office 365 integration

- Train the trainer

Health e(fx) keeps expanding Creatio's solutions by creating new KPIs adshboards as well as designing and improving a client portal. Creatio and Health e(fx) are closely working together to digitalize Health e(fx)'s processes, and support its acceleration.

ACCELERATE