

Customer Story: Benefytt

Industry

Insurance

Solutions

Optimization & Training

Staff

2,000+ Employees

HQ Office

Tampa, Florida

Benefytt is a health insurance company that engages in the development and operation of private e-commerce health insurance marketplaces, consumer engagement platforms, agency technology systems, and insurance policy administration platforms.



Salesforce Challenges

In just a short period of time, Benefytt experienced rapid growth, growing from 300 employees to just over 2,000. Despite Salesforce being an integral part of their organization, they became quickly overwhelmed trying to balance their personal growth with managing the robust system that is Salesforce. They found themselves scrambling to utilize multiple platforms and were often faced with unreliable and inconsistent data. As a result, development projects struggled to stay on schedule and overall organization and company functionality faltered as well.

Access Global Group Solutions

To address the series of challenges faced by Benefytt, Access Global Group implemented Salesforce solutions that aligned with the goals they wanted to achieve. This included implementing an overarching Contact Center and Computer Telephony Integration (CTI) solution that allowed Benefytt to easily monitor and record calls with real-time reporting. This provided their team with a complete picture of the client and the ability to make data-driven decisions accordingly. AGG also enabled custom scripting based on the caller product selection, region and type, which resulted in a drastic reduction in the contact center team's average handle time. It also significantly reduced time to conversion from lead generation, to capture and close. Additionally, AGG created a custom system configuration to optimize work processes and boost team productivity. In doing so, Benefytt saw a significant reduction in the number of clicks to perform an operation which streamlined their workflow and freed up time to focus on revenue generating activities.

Salesforce Results

Despite Salesforce being an integral part of Benefytt's day-to-day operations, management felt a disconnect in usage and many key functionalities sat underutilized. With Access Global Group's intervention, Benefytt's counterproductive system transformed into one that facilitated team unity and optimization. By remedying their internal and external integration points, Benefytt was able to expedite their sales cycle and manage accounts with ease, giving them the ability to exceed customer expectations. Additionally, AGG configured work process automations with real-time updates to give Benefytt the peace of mind that when data was being entered into Salesforce, it was accurate and up to date. Because of this, Benefytt saw a **40%** increase in sales numbers and a **30%** reduction in aftercall time. Overall, organizational productivity improved, helping the team to build out a long-term strategic plan rather than rely on reactionary planning. AGG helped to marry the org and platform to help enhance Benefytt's security and functionality, setting them up for success long term.