Customer Story: Sutter Health Plus

Industry
Healthcare & Insurance

Solutions
Sales Cloud & Service Cloud

Staff
3,000+ Employees

HQ Office
Roseville, CA

Sutter Health Plus is an HMO health plan affiliated with not-for-profit Sutter Health. They offer affordably priced health plans to individuals and employers in the greater Sacramento, Central Valley and Bay Area communities.

Salesforce Challenges

◎ One Salesforce system shared by Sutter Health and Sutter Health Plus
◎ Patient data from Sutter Health should be available to upsell Sutter Health Plus plans
◎ Support and Sales team should use the same system to manage sales and cases
◎ Must accommodate 300 person call center for Support and Sales
◎ Need for internal communication platform
◎ Need to integrate with multiple healthcare systems
◎ Need to integrate with multiple lead generation vendor systems
◎ Sales and Support team needs process automation
◎ Disaster recovery: agents should be able to work from home if needed
◎ PHI, PII & HIPPA compliant system design is required

Access Global Group Solutions

◎ Over 800 users moved to Sales Cloud, Service Cloud
◎ Service Cloud: custom Service Cloud consoles, support process, process automation, knowledge articles, solutions, cases created/defined by type, plan family
◎ Sales Cloud: sales process, process automation, prospects, web to lead from over 50 sites and prospect assignment
◎ Agent custom skill assignment console for managers Implemented email case queues based on priority
◎ Created reports & dashboards to track case SLA's & KPI
◎ Custom webservices to integrate with various health care systems and vendor systems using WS security restrictions
◎ System is built according to PHI, PII & HIPPA regulations
◎ Chat is enabled for internal communication

Salesforce Results

◎ Sales and Support data is in one system
◎ Data is stored according to PHI, PII & HIPPA regulations
◎ Sales and Support automation is reducing 99% of human error
◎ Chat is used for internal communication
◎ Data is accessible from multiple external systems through web services
◎ Agents can now work from home as needed
◎ Sales and Support numbers are consistently meeting KPI's
◎ Leadership has clear visibility using reports & dashboards for measuring ROI