Industry
Healthcare & Life Sciences

Our client is a regional healthcare payer that provides comprehensive medical, vision, and dental benefits to over a million members.

Products Used

Health Cloud

Salesforce Knowledge

Challenge

Our customer wanted to reduce its member service team's handle time & improve accuracy by consolidating all reference documents (e.g, relating to procedures, articles, phone lists, etc.) within Salesforce.

Pre-project, 2000+ key documents were housed within Upland Panviva; **member service reps needed to "swivel chair" between Salesforce and the external platform** when handling member inquiries.

Maintaining both platforms led to technical debt, increased rep workload, extended call handle time, impacted member satisfaction, and increased risk of case inaccuracy.

The payer needed to **migrate all documents into Health Cloud and sunset the Upland Panviva platform;** this project would reduce technical costs and provide member services with a more comprehensive solution.

Value Delivered

Gerent manually extracted and migrated ~2,000 documents from Upland Panviva into Health Cloud, then leveraged Salesforce Knowledge to design an intuitive experience for document creation, editing, and search.

- Without a mass-export capability, our consultants had to **manually export all documents** (some 30+ pages) as Word documents, convert to HTML, then load each document via CSV file into Salesforce.
- We **established document formatting standards** that would facilitate asset migration and streamline article creation.
- We **used Smart Links to connect to other articles** within Salesforce and external links to reference other resources, such as websites and SharePoint.
- **We created reporting dashboards** and provided extensive training to the business team.

Results
Gerent has empowered the client to:

- Achieve instant, comprehensive insight into the documentation process

- Allow Member Services to access all references and member information within one service console

- Automatically surface relevant articles; documents are suggested based on case inquiry types and keyword searches

Gerent