Pega Sales Automation for Healthcare

Boost sales efficiency. Raise win rates. Grow your business.

A Pega Sales and Onboarding Datasheet

Simplify and tailor sales journeys to close more deals

Pega Sales Automation™ for Healthcare singularly provides the capabilities needed today to gain and retain healthcare members. End-to-end sales automation for group and individual health coverage streamlines and shortens sales cycles, making every agent a top performer. Intelligent sales guidance for government- sponsored and commercial health insurance personalizes new business and renewal journeys, driving user satisfaction and boosting win rates.

With Pega Sales Automation for Healthcare, you can fine-tune your customer acquisition operations to outperform sales and growth targets. Deployed on premise or in the cloud, the application makes it easy to update sales processes, business rules, and even user experiences across sales devices, channels, and markets. This means tailored support for internal sales teams, field agents, external brokers, self-service shoppers and insurance exchanges alike.

Only Pega provides retail-level agility to healthcare organizations, so you can move at the speed of the industry, compete better, grow faster, and stay compliant.

- **Close more business with healthcare sales automation:** Reduce manual errors, eliminate time delays and re-work, safeguard regulatory compliance, and drive sales to close with end-to-end sales processing. From rating and quoting through application submission to renewal processing, Pega streamlines health insurance sales across all distribution channels.

- **Drive engagement and win rates with digital convenience:** Satisfy and support your sales teams by making it easier for them to do business. A mobile platform, the application delivers tablet support, broker portals, and web self-service functionality for B2B and B2C sales. Email and calendar integration, dashboard personalization, and other convenience capabilities make Pega especially favored by external brokers and field agents.

- **Manage market complexity, maintain compliance, and get new programs to market faster:** Pega empowers healthcare organizations to respond and stay synchronized with constantly changing regulatory, competitive, and market demands. Rapidly change your sales processes, lead assignment logic, and more, to ensure you stay competitive, compliant, and in control.

Challenge

Choosing health insurance is growing harder. Changing rules, new marketplaces, tighter sales periods, and heightened consumer involvement strain what are already high-stakes decisions. New sales models call for tailored sales navigation, streamlined processing, and rapid market response. Traditional sales tools do not deliver.

Solution

Pega Sales Automation for Healthcare boosts effectiveness and win rates across health insurance sales channels. Context- aware process automation, intelligent guidance, and digital-age convenience make it easier to seal deals. Plus, Pega's agile sales platform helps manage complexity and speed time to market, so you can take control of constantly changing regulatory, competitive, and consumer demands.

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Today, with more individuals and agents shopping annually for health coverage online, at kiosks, and on various devices, there are new opportunities to take the lead and grow. With healthcare decisions moving closer to consumers and retail expectations rising, customer acquisition and renewal success increasingly depends on your ability to help users navigate complexity and feel good about their purchasing experiences. Pega Sales Automation™ for Healthcare brings efficiency, agility, convenience, and performance to health insurance sales so you can slash sales cycles, boost win rates, and build market share while the industry continues to transform.

Our powerful technology delivers:

Intelligent guidance and automation for B2B and B2C health insurance sales to increase sales productivity and results.

- End-to-end processing spanning sales force management, quoting, proposal generation, census management, contract submission, application processing, and renewals.

- Shopping-cart product review, selection, and rating for medical, dental, vision and Rx coverage, including HMOs, PPOs, HSAs, Medicare plans, and medal plans per Accountable Care Act provisions.

- Real-time sales forecasts, drill-down performance reports, and system-generated alerts for management visibility and control.

Digital convenience capabilities to drive engagement, satisfaction, and winning sales journeys.

- Full mobility, tablet, and smart device support, plus consumer and agency web portals to meet purchasers in all their communication channels.

- Email and calendaring integration, geolocation mapping, and dashboard reporting personalization make work easier for sales agents so they can focus on closing deals.

- Co-browse and chat capabilities let you guide self-service shoppers and brokers through successful online transactions.

An agile, unified platform to take market control and fully support healthcare business.

- With top analyst rankings from Gartner and Forrester for transformational functionality (CRM, BPM, mobile apps, analytics, case management, and real-time interaction management), the low-code Pega Platform™ helps enterprises build functionality 6.4x faster and change functionality 8x faster than conventional programming.

- Deploy on premise or via the secure Pega Cloud®, with a turnkey service providing immediate access to create, test, deploy, and manage applications.

- For total support across the healthcare customer journey, add other Pega Platform healthcare applications for customer service, care management, product development, marketing and claims.

Pega Sales Automation for Healthcare brings efficiency, agility, convenience, and performance to health insurance sales.