



# Pega Sales & Enrollment for Healthcare

## Intelligent Multi-Channel Sales & Enrollment Suite for Groups and Individuals

### AT A GLANCE

**KEY CHALLENGE:** Healthcare reform and intense market pressures combine to make sales growth and market share imperative for healthcare organizations. Yet, a saturated group sales market and a massive new individual sales market pose challenging and seemingly opposite sets of business demands. Health plans are faced with the daunting task of highly effective sales & enrollment in two polar opposite markets.

**THE SOLUTION:** Pega uniquely addresses both the group and individual sales markets with its Sales & Enrollment for Healthcare solution. Only Pega intelligently guides sales across every channel and every interaction, automates sales processes in context with each situation, and delivers a superlative, stream-lined customer experience throughout the sales cycle.

### \$1 Billion Business in a Year!

Leveraging Pega to intelligently automate sales & enrollment processes, CSC entered a completely new market and took a major share – **enrolling one million members** within four months to become the 4th largest prescription drug plan in the nation. The company relied on Pega to help tailor each user's experience and keep CSR performance at top levels. The results were spectacular: **74 days from start-up to operational; \$1 billion in revenue; #1 rank for customer satisfaction; and 50% reduction in training time**

### Increase Member Retention 35% & Individual Growth 40%

Typical sales force automation (SFA) applications are general-purpose, with no foundation to address the specific needs of healthcare like PHI or the unique needs of group versus individual sales and enrollment efforts. As a result, healthcare organizations agonize through difficult SFA implementations and tolerate inadequate sales and enrollment systems. Instead, Pega Sales & Enrollment for Healthcare (S&E) puts health plan sales and member enrollment at the heart of your enterprise because it is purpose-built with integrated modules to meet the specific needs of group sales and individual sales. With Pega, you can eliminate manual procedures, maximize the value of existing systems to seamlessly move work among all the required staff and systems, yet easily configure and rapidly execute the sales processes that are best for each of your unique business lines and channels.

Pega automates the complete sales process from prospecting, lead assignment and sales stage promotion through enrollment and service. While delivering all the traditional SFA capabilities, Pega also leverages its business process management capabilities and Healthcare Industry Foundation core to intelligently manage each opportunity. Deployed on the cloud or on-premise, Pega Sales & Enrollment for Healthcare is the only solution that truly supports the complete health plan sales cycle, leading to higher sales representative effectiveness, stronger customer loyalty and increased sales margins.

- ▶ **Maximize selling success.** Pega guides representatives through complex sales processes, suggesting the next appropriate activity to close the deal and build the relationship.
- ▶ **Instantly optimize each sales process.** Dynamic rules automatically adjust the standardized sales process to accommodate unique situations, eliminating any need to maintain multiple versions of your sales process or force representatives through unnecessary manual activities.
- ▶ **Deliver seamless cross-channel execution.** Pega SFA easily integrates with existing systems to orchestrate all of the people, data and systems needed to successfully uncover, work and win deals.
- ▶ **Enhance sales agility.** Pega's Build for Change® technology makes it easy to model and tailor your sales process without coding, allowing you to rapidly adapt to changing market conditions, products, organizational structures and sales goals.



## THE PEGA DIFFERENCE

### The Pega SFA Difference

- ▶ Situational execution dynamically specializes the process by representative, business unit, prospect, product, channel, geography, regulation and any other user-defined criteria.
- ▶ Case management drives the most complex, multi-threaded sales process, enforcing best practice methodologies at every stage.
- ▶ Automated lead and opportunity assignment, sales stage management, correspondence generation and target account reporting minimize manual work.
- ▶ A complete view of the sales process, including past and planned activities, maximizes visibility.
- ▶ Unified channel management enables sales personnel to communicate however they want, including via social tools and mobile devices.
- ▶ Pega's business process platform maximizes work automation by seamlessly connecting sales processes with other key enterprise systems and processes including marketing, customer service and fulfillment.
- ▶ Familiar office tools delivered via a business-focused portal allow sales management to quickly configure rules, processes, routing, escalation, user interfaces, access privileges and other key components into a fully functioning SFA solution without any coding.



### Highly Efficient Group Sales

- ▶ Sales Profile creates and maintains prospect, agency and broker profiles; manages prospect-focused activities and provides on-demand or system generated correspondence in multiple formats.
- ▶ Auto-Proposal imports Excel-based employee census data, automatically suggests product offerings, and delivers appropriate rate cards allowing multiple sales representatives to create proposals for the same employer.
- ▶ Underwriting Support provides effective-dated actuarial and underwriting tables to support multiple rating periods and new customer rating for multiple products.
- ▶ Auto Enrollment pre-populates enrollment fields, manages notification and approval process through relevant departments, electronically submits master contract data to legacy enrollment systems, and sends multichannel correspondence to necessary parties.

### Cost Effective Individual Sales

- ▶ Targeted Product Promotion dynamically suggests and presents "right fit" product offerings.
- ▶ Simplified Application Experience includes pre-defined best-practice processes for application data capture, dynamically generates and pre-populates appropriate application forms.
- ▶ Automated Application Processing with risk factor calculations and user-defined thresholds for approve, deny and review, and guided underwriting.
- ▶ Automated Enrollment provides system-driven data transfer and updates to systems of record, including membership and billing systems.

Pega provides role-based portals for managing the customer across the sales cycle, helping to increase productivity and build lasting, profitable customer relationships.

