

Case Study

Streamlining Operations for
Highlight Health with a Custom
Microsoft Dynamics Solution

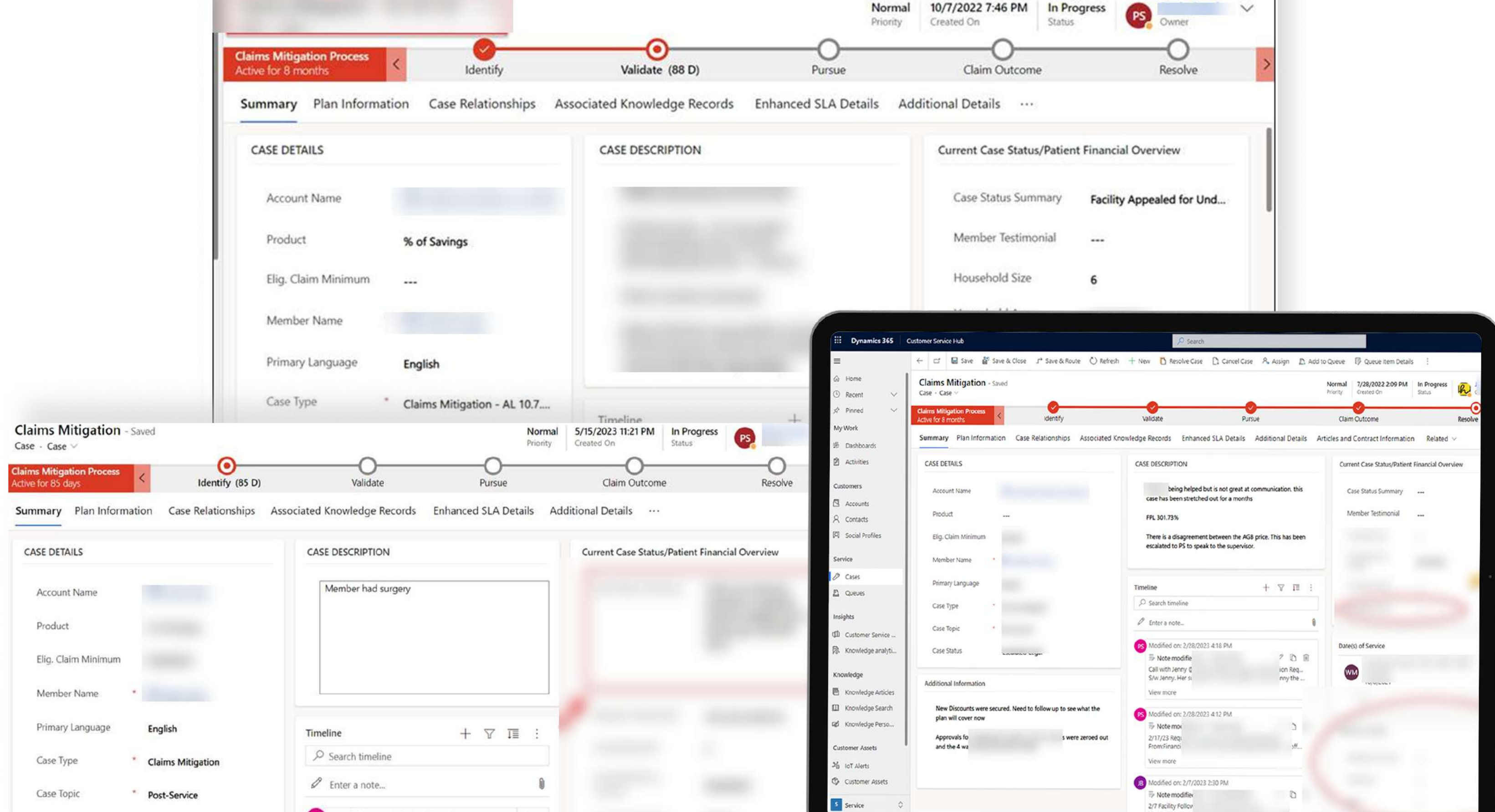


The Customer

And Their Challenge

Highlight Health (HLH) stands at the forefront of healthcare management and claims repricing, with a mission to ensure clients never overpay for healthcare. They help American companies – associations, unions, brokers, employers – and individuals navigate an increasingly complex healthcare system. As the company continued to grow, they faced a significant challenge of handling an increasing amount of customer data and its management.

HLH needed an IT consultant to craft, develop, and seamlessly integrate a new Microsoft Dynamics 365 system. The system had to manage healthcare eligibility and claims while addressing the stringent requirements of HIPAA and PHI privacy. Moreover, integration with various Microsoft and third-party tools was crucial. The ultimate need was to implement an efficient system that facilitated easier, seamless client profile management.

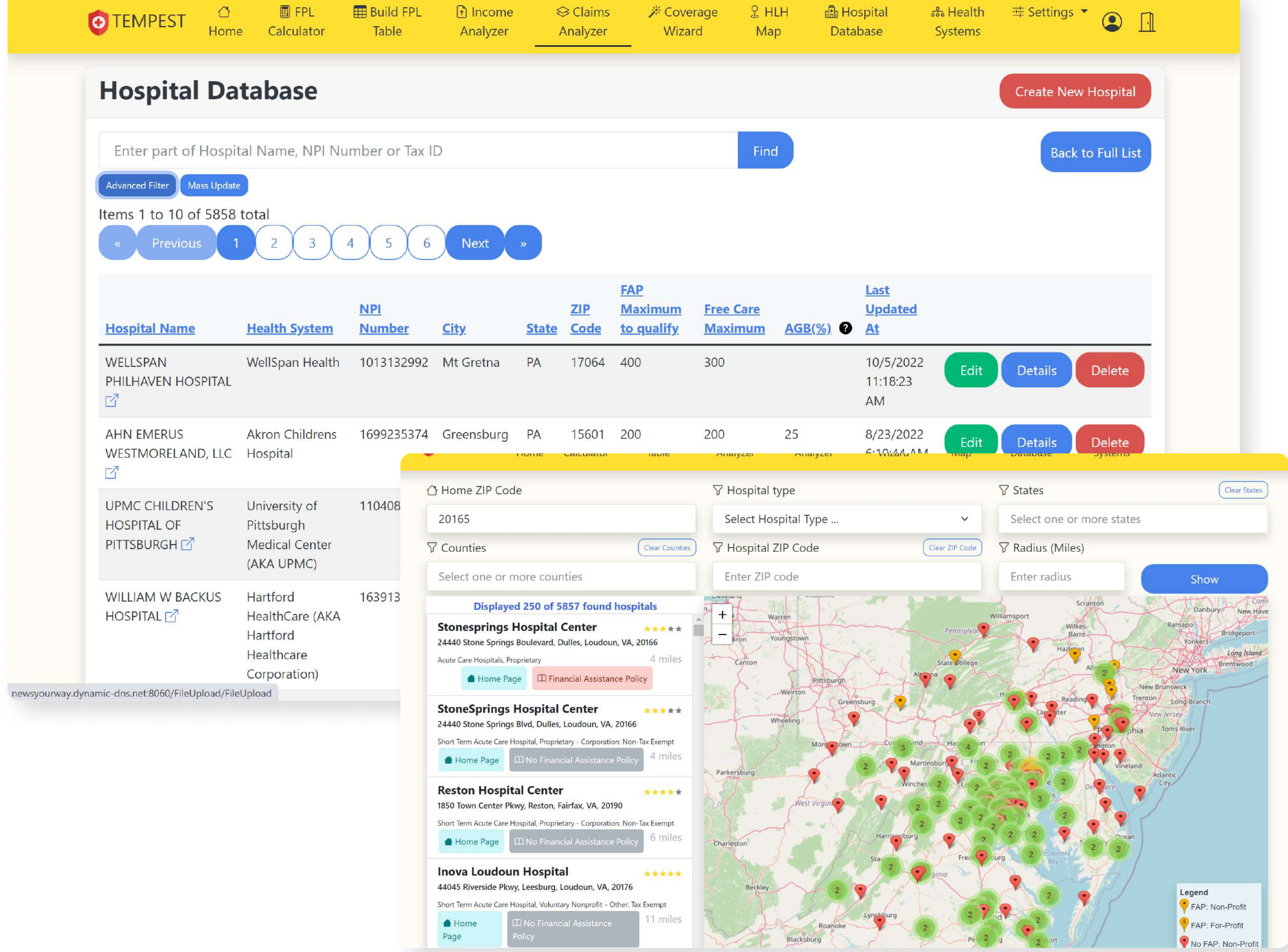


The Solution

A Tailored Customer Relationship Management System

i3solutions rose to the challenge, designing and executing a robust Customer Relationship Management (CRM) application tailored for HLH. The system centralizes customer data, providing HLH with a comprehensive view of their clients' interactions, preferences, and history, which in turn improves customer service and relationships. Additionally, the application streamlines processes, helping HLH boost efficiency, increase sales, and make data-driven decisions to drive business growth.

The application we developed empowers HLH's call center representatives by instantly providing them with essential client information as soon as calls are picked up. The custom integration with tools like Ring Central and email ensures real-time access to patient and client data. It not only reduces call and wait times but also elevates the customer experience to a streamlined level.



Technologies

Used in the Solution

i3solutions leveraged a suite of technologies to deliver a comprehensive solution for HLH that enhances call center productivity, minimizing the time representatives spend toggling between applications and searching for data.

Dynamics is the backbone of the CRM system that facilitates customer service and case management. It stores all client data, tracks claims, and helps to manage the sales pipeline and customer information. Customer service agents can access data in real time offering a smooth customer service experience. Additionally, it is used to manage enrollment data and synchronizes with Ring Central.

When integrated with Dynamics, Office365 enhances customer relationship management by leveraging the suite's tools for communication, collaboration, and productivity. Users can schedule and track meetings via Outlook, collaborate on documents in real-time using OneDrive and SharePoint, and automate tasks using Microsoft Flow.

Ring Central provides seamless call management and integration. As soon as clients call in, the software automatically brings up that client's profile and case details, reducing the time agents spend searching for information.

SharePoint Online functions as a centralized document management and collaboration platform. It houses all strategic documents for cases and enrollment data and stores all corporate operations related documents and information.

i3solutions's Custom Software Development team uses Geospatial Analytics to display hospital and related care information on a map. It helps determine which hospital clients should visit to receive the best price for necessary care.

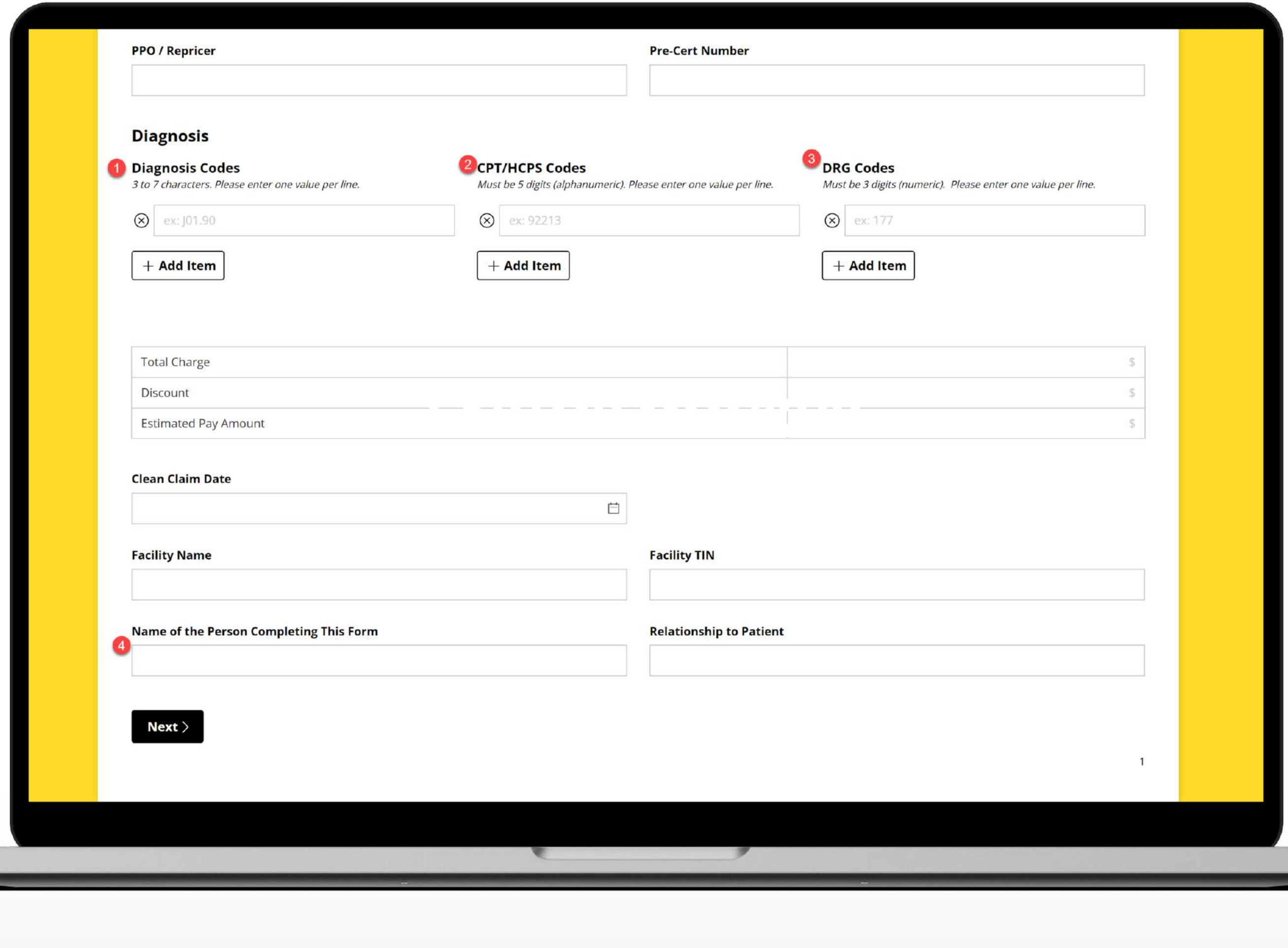
Microsoft Teams provides one platform for internal messaging and communication. This allows teams to quickly message and communicate in real time to increase productivity and enhance the customer experience.

When enrollment data is uploaded, Flow automatically sends the data to Dynamics and Ring Central. By using triggers, conditions, and actions, i3solutions tailored workflows specific to HLH's needs, ensuring that data remains synchronized, processes are efficient, and teams are always informed of crucial developments.

Cognito Forms is an online form builder used to automate data collection and provide web-based access to common forms. Custom workflows route forms to the appropriate person during each step of the process, which eliminates repetitive manual data entry and ensures accurate, up-to-date records.

Stripe is an online payment processing platform that is integrated into HLH's website to accept payments for healthcare enrollment. Automated notifications, such as payment reminders or confirmations enhance the overall customer experience and improve revenue management.

i3solutions also used other Software-as-a-Service (SaaS) products to help with outbound communication and increase engagement, leveraging the power of modern technology to enhance HLH's outreach efforts and foster meaningful connections with their audience.



Measurable Benefits and Business Impact

The custom solution crafted by i3solutions has a profound impact on Highlight Health's operations:

Enhanced Customer Experience

With real-time access to patient information, call and wait times are significantly reduced.

Boosted Productivity

Integration with various tools means less time switching between applications, leading to more efficient call handling.

Informed Decision Making

Geospatial Analytics provides call center representatives with the ability to guide patients towards the highest level of care at the most affordable cost.

Robust Data Security

The system's design ensures full compliance with HIPAA and PHI privacy standards, guaranteeing patient data remains secure.