

UPMC Health Plan Streamlines the Medicare Sales Process with *ikaSystems*' Medicare Sales/Broker Portal

CASE STUDY

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UPMC Health Plan is the second-largest health insurer in western Pennsylvania, serving more than 700,000 members, 40,000 of which are Medicare beneficiaries. The plan’s provider network includes its owner, the University of Pittsburgh Medical Center (UPMC), one of America’s top-ranked health systems, as well as more than 80 community hospitals and 7,000 physicians across 28 counties.

In early 2006, UPMC began an aggressive campaign to grow its Medicare HMO and PPO product lines that combined television, print and radio advertisements. The plan’s legacy system was a key tool in this campaign but had significant limitations. Sales representatives had to complete a lot of paperwork. The system, which was designed primarily for commercial group and company campaigns, made it difficult for sales staff to use, either to access individual contact screens or to collect information by phone. Workarounds, such as entering information into a spreadsheet for data entry staff to then enter in the system, were inefficient and error prone. In addition, the system had no enrollment interface to CMS.

UPMC began to seek an alternative tool for sales force automation. CIO Ed McCallister worked with IT and business groups to identify the following primary requirements:

- The ability to be highly customizable to UPMC’s specific needs
- Flexibility and efficiency for sales representatives, brokers and other users
- Comprehensive enrollment tracking capabilities
- State-of-the-art technology running on a .Net platform
- Low total cost of ownership

A Smart Decision

Ultimately, UPMC selected *ikaSystems*' Medicare Sales/Broker Portal for the following reasons:

- The system could be configured easily for UPMC’s unique requirements.
- *ikaSystems* guaranteed a short time to value.
- The system offered superior navigation and usability, which would allow UPMC staff to quickly find, enter and act on information.
- Using the system, UPMC would be able to track and monitor marketing campaigns and otherwise facilitate campaign management.

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The Medicare Sales/Broker Portal automates sales and underwriting processes, including premium billing and commissions. A key differentiator of the product is its real-time access to the MARx database through *ikaSystems*' relationship with

Government Works, a CMS contractor. Medicare applications are validated and enrollment occurs within minutes.

The portal records, categorizes, stores and tracks information according to insurers' business rules. The system is extremely flexible and can be easily configured to incorporate business intelligence that maximizes the success of brokers and internal sales reps. For example, brokers can bring up an old quote, modify the information and then re-quote and provide discounts in real time, without having to re-key group information.

Comprehensive reports detail the history of all processes and proposals generated for a group, or help management easily identify problems with brokers, internal staff or underwriting by capturing how long the sales process has taken, from one task to the next.

Implementation Lessons

Implementation was remarkably quick. *ikaSystems* business analysts worked closely with UPMC Medicare personnel to gather requirements in July and August 2006. System design began in September. Analysts met with UPMC Medicare business groups to refine the requirements, a challenging experience because UPMC lacked business requirements documentation and process mapping experience. Engaging a consulting firm to assist with process mapping helped the UPMC lay the appropriate groundwork for system configuration. Data conversion and training for the Medicare team occurred in October, and the system went live in November.

In looking back over the process, McCallister recommends that organizations develop a comprehensive change management plan — training alone is not quite enough to make a technology implementation go smoothly. In addition, creating highly customized business rules takes time, and organizations should plan accordingly.

Quick Results

UPMC has realized some very tangible benefits from implementing *ikaSystems* technology:

- **Improved data accuracy** due to nightly enrollment verification between lead an enrollment systems as well as interaction between *ikaSystems*' technology and UPMC's membership application, which reduced data entry errors
- **Enhanced lead management** through the use of rules-based technology as well as more comprehensive information on leads and members
- **Greater efficiency** by reducing manual processes — for example, automating the distribution and management of literature to prospects, allowing sales staff to focus on selling and not mailing
- **More accurate assessment of campaign impact** due to better data collection and reporting capabilities.

According to McCallister, "The most critical thing is that now the brokers and sales people have the right tools to get the job done, and *ikaSystems* has been a great partner in dealing with all issues."

UPMC has been so pleased with the results that *ikaSystems* is now rolling out sales force automation for the insurer's small group commercial business.

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