



INDEPENDENCE HEALTH GROUP

Leveraging Microsoft Dynamics 365 to improve sales effectiveness and customer relationship management



When it comes to delivering health care, people come first. It's a service built on trust and understanding. For Independence Health Group (Independence), a leading health insurance company, meeting the evolving demands and expectations of health customers became a challenge – but one it was ready to face with a business intelligence solution that relies on data, analytics and insights to transform experiences, drive growth and loyalty and improve customer relationships and engagement.

Client profile

Independence serves more than 8.5 million people in 29 states. Recognizing that each customer is an individual with unique needs and concerns, it strives to deliver access to care that meets or exceeds customer expectations.

Opportunity

Better management of complex customer relationships

In a rapidly evolving digital environment, Independence was challenged to effectively manage complex customer relationships and engagement opportunities throughout the sales process. It was leveraging traditional sales processes and manual solutions to maintain customer information and execute sales activities across lines of business. It also lacked a single customer relationship management (CRM) platform to serve as the source of truth for customer information.

Independence needed a solution that could help manage and coordinate sales activities across a number of constituents, making it easier to do business with the company and delivering against aggressive growth and retention targets. The company also needed a solution that could provide leading reporting and analytics capabilities. Improving workflow and communication processes would help close sales opportunities and route approvals more effectively and efficiently.

Independence knew that it was time to harness the latest innovation and technology. From marketing to sales to service delivery, it aimed to create a cost-effective, connected experience for customer information and relationship management.

Solution

An intelligent digital solution to improve sales effectiveness and CRM

To support this digital sales transformation, Independence needed a supplier that had the right tools, talent and experience with CRM implementations as well as a supplier that understood the nuances of the health care industry and the company's local market. Having worked with Independence for decades – including five years of experience helping the company solve complicated problems in the front office (across product, sales, marketing and service) – Accenture and Avanade (a joint Accenture and Microsoft venture) were the clear choice.

We collaborated with Independence's business and technology teams, leveraging an agile delivery approach (a first for Independence), to implement and integrate Dynamics 365 into the broader front office ecosystem and deploy it across multiple Independence sales teams and functions. By focusing on business process optimization activities, we helped Independence provide its sales resources with simpler, more effective digital tools to support the end-to-end sales cycle. Specifically, the team delivered:

- Integrated data and sales interaction information for a more complete view of the customer relationship;
- Analytics capabilities to power sales planning and execution processes and provide more accurate and automated forecasts; and
- A mobile solution that expands the sales team's access to data and improves their ability to provide customers with more meaningful interactions and a better experience during the sales process – anytime, anywhere.

Independence wants to provide a great experience to its customers, anticipate their needs and proactively provide more affordable products and services. This intelligent digital sales CRM solution allows the company to do just that.

We delivered this large-scale, seven-month project two weeks early and within budget. Moreover, we coached and trained Independence delivery teams on the agile methodology leveraged during the project, and they effectively assumed management of all processes, functions and technology components.

"This should be the poster child for how we run projects at Independence," said the company's chief marketing officer and leader of sales enablement and support.

Results

Improved speed and mobility, consistent customer experience, lower administrative costs

The new solution provides data-driven insights that help Independence make better business decisions so that it can present customers with more attractive and tailored product options, all while reducing costs. Avanade and Accenture helped the company achieve:

- **Speed:** Greater access to more complete data, analytics and insights will help decrease the sales cycle time.
- **Mobility:** The Dynamics CRM mobile app gives the sales team access to data on-the-go, allowing them to more efficiently close and renew deals. This includes the ability for sales teams in the field to track and refer to Outlook emails, helping to facilitate more productive conversations with customers.

- **Quality:** Increased customer visibility is improving quality and consistency across sales interactions and performance across lines of business, giving customers a more personalized and enjoyable sales experience.
- **Efficiency:** Moving from manual processes to a digital and intelligent business solution is projected to help Independence save approximately \$2 million in administrative costs annually.
- **Growth:** With a customer-centric approach and improved sales experience, Independence can proactively bundle and recommend right-fit and profitable products and services. The solution is projected to help the company increase retention, drive new up-sell and cross-sell opportunities and increase revenue.

Independence will continue leveraging data management features within Dynamics 365 to help it design innovative self-service tools to more easily facilitate and finalize sales. Doing so will boost its competitive advantage and position it for further growth.

On the heels of this successful initiative, Independence continues to invest time and resources to enhance its sales CRM capabilities and build on the strong foundation delivered during this project. The company continues to educate and train internal and external users, gather feedback to continually improve the solution and identify opportunities to expand usage and adoption to other business areas and subsidiaries.

With Accenture and Avanade's help, Independence is embracing digital innovation and transforming the front office to drive profitable growth and deliver a market-leading and differentiated experience to its customers.

About Accenture

Accenture is a leading global professional services company, providing a broad range of services and solutions in strategy, consulting, digital, technology and operations. Combining unmatched experience and specialized skills across more than 40 industries and all business functions—underpinned by the world's largest delivery network—Accenture works at the intersection of business and technology to help clients improve their performance and create sustainable value for their stakeholders. With approximately 442,000 people serving clients in more than 120 countries, Accenture drives innovation to improve the way the world works and lives. Visit us at www.accenture.com

About Avanade

Avanade is the leading provider of innovative digital and cloud services, business solutions and design-led experiences delivered through the power of people and the Microsoft ecosystem. Our professionals bring bold, fresh thinking combined with technology, business and industry expertise to help fuel transformation and growth for our clients and their customers. Avanade has 30,000 digitally connected people across 24 countries, bringing clients the best thinking through a collaborative culture that honors diversity and reflects the communities in which we operate. Majority owned by Accenture, Avanade was founded in 2000 by Accenture LLP and Microsoft Corporation. Visit us at www.avanade.com.

About Microsoft

Founded in 1975, Microsoft (Nasdaq "MSFT") is a leading worldwide company in software, services and solutions that help people and businesses realize their full potential. Visit www.microsoft.com.