

Affiliated Helps Health Advisory Firm Increase Operational Efficiency with Microsoft Dynamics CRM

Summary

In 2007, MB Senior Solutions was formed to provide health plan guidance to retirees. Since its launch, MBSS has become one of the largest advisors in the Midwest, specializing in Medicare and supplemental health plan selection. Currently, health plan guidance is offered under its RetireMED®iQ brand, which has advisory centers in Dayton, Cincinnati, and Warren, Ohio, and provides personal advisory services to early and Medicare-eligible retirees, as well as their families.

Challenge

Since its startup years, MBSS enrollment has skyrocketed to over 24,000 customers. Its catalysts for growth: chaos and confusion in the health care market, particularly around Medicare. MBSS provides guidance and clarity for seniors sorting through all the options in Medicare Advantage, Part D prescription drug plans, supplement plans, and even ACA Exchange plans, all at no cost to customers.

Despite running a very healthy business, executives felt they hit a roadblock a year ago. Their outdated CRM solution didn't have the robust functionality and flexibility to take the company's growth to the next level. "With boomers retiring and the marketplace in constant flux, we saw an opportunity to double our business in the next couple years," says Bud Hauser, MBSS Vice President of Operations. "But to serve more seniors effectively, we needed to overhaul our CRM solution first."

Affiliated 'A Great Fit'

The critical issue with the legacy CRM solution was its inability to capture data and then derive actionable business intelligence (BI) and reporting from the captured data. "We need that data to help existing customers and target new prospects with information about 'the right' health plan for them," Hauser explains. "To truly serve our customers and grow the business, we must have easy access to data."

MBSS considered a number of CRM solutions, including updating its previous CRM system. But after a thorough review, they decided on Microsoft Dynamics CRM, largely because of its robust reporting, BI functionality and industry reputation. Next, they selected Affiliated, a Columbus, Ohio-based IT consultant and Microsoft Gold Certified Partner in CRM, to implement the solution. Says Hauser, "They were responsive, local, and just the right size. We didn't want to get lost in a big company. It turned out to be a great fit."

Improved Customer Service

Over several months, Affiliated worked closely with the MBSS staff, learning workflows and customizing a "wish list" of functions into the new CRM solution. Topping that list was the ability to quickly inform seniors about changes in their plans. In the past, for example, if a doctor left a network, the only way MBSS could alert customers would be to manually search every customer file. Hauser calls that process "impractical." Now, using CRM, they have easier access to data and can compile

"I count on Affiliated to help us achieve our business goals as a true partner."

- Bud Hauser, Vice President of Operations,
MB Senior Solutions

Challenge

MB Senior Solutions (MBSS), a leading health care advisory service for retirees in the Midwest, saw opportunities for tremendous growth but first needed to improve the way it managed its business data and intelligence to attract and retain customers.

Solution

Affiliated implemented and customized Microsoft Dynamics CRM, and then worked with MBSS staff to learn how to use the solution for targeted marketing and stronger customer relations.

Benefits

Expects to double enrollment in next couple of years to over 50,000 customers, while nudging up the customer retention rate to an impressive 98%. MBSS now automates reports, correspondence and applications in a fraction of the time, and it has increased operational efficiency and staff productivity.

Key Solutions and Services

- Microsoft Dynamics CRM
- Affiliated Technology Assessment Services
- Affiliated Implementation, Customization and Training Services

a list of impacted customers, notify them, and inquire whether or not they want to change plans. "That ability makes us a more proactive service organization," he says.

Greater Efficiencies

Affiliated's in-depth knowledge of Microsoft CRM is helping MBSS gain operational efficiencies as well. The company's past process required manual entry for filling out annual application renewals. Now with CRM the applications can be auto-populated. In addition, customer correspondence took days to generate; now letters can be mailed in a fraction of the time. With less manual labor and more automation, employees can focus on more productive tasks and provide better face-to-face communication with customers. "It's helping us build stronger customer relationships, which is key to our success and to our growth," Hauser adds.

High Retention Rate

Early first-year returns indicate that nearly 95 percent of MBSS customers are being retained. "This is exactly the level of engagement we hoped to achieve," notes Hauser. "Microsoft Dynamics CRM helps our teams think more strategically about how to best serve our customers."

Hauser credits Affiliated for guiding them through the customization of Microsoft Dynamics CRM to learn how it can best fit MBSS' business processes. "We're still discovering how to take advantage of the solution and Affiliated is always ready to help us and answer our questions. It's a learning process. Fortunately for us, their technical knowledge of the Dynamics CRM platform far exceeds ours," he says.

"For us, the game-changer is the way Microsoft Dynamics CRM has enabled us to take volumes of data and begin to derive real business intelligence from it. This allows us to strengthen our relationships with existing customers, develop new ones, and improve as a service organization."

- Bud Hauser, VP Operations, MBSS

About Affiliated

Since 1993, Affiliated has been helping growing and midmarket organizations identify, evaluate and implement technological solutions to improve operational efficiency and increase revenue. As a member of the Microsoft® Partner Network certified in both Microsoft Platform and Microsoft Dynamics CRM solutions, as well as a VMware Enterprise Solution Partner, Affiliated specializes in providing complete technology solutions including both software and services to organizations in multiple industries including distribution, manufacturing, health care, professional services, government, and not-for-profits.

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