

BENEFITFOCUS

Benefitfocus is a leading provider of benefits technology. More than 23 million consumers manage all types of benefits in the Benefitfocus Cloud. By delivering technology that integrates all benefits in one place, Benefitfocus provides a better way to engage consumers, educate employees and simplify benefit enrollment and management. Benefitfocus provides employers, members, insurance carriers and government entities cloud-based technology to shop, enroll, manage and exchange benefits information.

Challenge

Benefitfocus needed to expand their CRM platform beyond standard functionality, integrate it with their internal systems, and provide efficiencies to effectively manage communication for customer onboarding projects, renewals and ongoing customer service and support.

They sought to leverage sales and support processes that could not be accommodated in their current CRM platform. Due to internal constraints and a fast changing industry, they had limited time to change CRM platforms. They also faced a significant data migration challenge associated with the move.

Solution

EnablePath worked with BenefitFocus to define and build new processes into their current Salesforce platform. Sales Cloud was upgraded with a new Service Cloud roll-out, which included new support processes, custom CTI integration and an email to case solution. A specific cutover strategy included data migration from existing data sources, and was used to meet the targeted go-live date. The project was completed on time and within budget.

Results

BenefitFocus reported early and significant improvement in productivity within their sales and support organizations.

Training on the new platform and processes, including a VisualForce sales summary, was developed and conducted for all 373 users who reported dramatic improvement in satisfaction with the functionality and ease of use of the new application.

The project was completed within 11 weeks, effectively meeting the client's timing and budget expectations.