Empowering Commercial Insights at Sentara Health Plans with Proposal Data Integration

A combined Icertis and Salesforce solution enables the health plan sales team to streamline cross-functional operations and send proposals to customers quickly.

Contract Intelligence Objective

To streamline and digitize complex health plan modification workflows within Sentara Health Plans by implementing an intelligent, end-to-end Contract Lifecycle Management (CLM) system integrated with Salesforce aiming to automate proposal approvals, enhance compliance, reduce manual effort and errors, and provide real-time visibility across sales and operations.

Solution Highlights

- Seamless Salesforce and Icertis integration boosts user adoption
- Automated workflows route proposals to the relevant reviewers
- Real-time proposal data flows seamlessly back into Salesforce upon approval

The Challenge

Sentara Health, an integrated, not-for-profit health care delivery system, is one of the 20 largest not-for-profit integrated health systems in the country. It has over 30,000 employees, 12 hospitals in Virginia and Northeastern North Carolina, and the Sentara Health Plans division, which serves more than 1 million members in Virginia and Florida.

Sentara Health has set an ambitious plan for growth-a goal empowered by digital transformation. In this journey, contracting emerged as a strategic target for digital transformation in its health plan division.

Sentara Health Plans works closely with brokers and employers to negotiate health plans that best fit employees' needs while complying with regulations and financial controls. This includes things like determining unique plan designs: Sales teams negotiate modifications, submit those modifications for approval, and then send the proposal to the broker for review.

Sales teams faced significant challenges in their proposal process. Modifications to health plans were initially submitted for approval via email to compliance and operations teams. Approved changes were then manually entered into proposals for brokers and customers, creating a slow and labor-intensive workflow. This approach not only increased the risk of human error but also limited visibilityover the process.

Previous attempts to digitize and automate this process had failed due to the complexity of modification workflows, approval processes, and the challenge of compiling customer-ready proposals.

The Solution

In response to these challenges, Sentara Health opted for Icertis as its enterprise-wide contract lifecycle management (CLM) solution, enhancing operations across payer and provider functions.

The integration of Icertis with Salesforce provided a pivotal opportunity for the health plan division to unify its fragmented sales and operational processes, enabling collaborative and efficient workflows. With automated and trackable procedures, the sales team can now access standard plan information and input modifications directly within the existing CRM for a seamless experience.

Annie Alexander, Vice President of Sales Solutions at Sentara Health Plans, remarks, "The Salesforce integration was critical. Our sales team was already using Salesforce, and this allowed them to stay within that system, which is a significant factor for user adoption."

Proposals are routed to the relevant reviewers through Icertis based on the nature of the modifications. Depending on the type of modifications, specific workflows are triggered so that the appropriate teams can review. Once approved, updated information flows seamlessly back into Salesforce, generating the proposal document for the sales team to present to customers.

> **"We can align our products with customer needs more effectively and provide more insight during product design,"**
>
> **-Annie Alexander, VP of Sales-Solutions**

Sentara®

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The Results

The automation of the proposal process marks a significant early achievement in Sentara's long-term roadmap with Icertis. As the organization introduces more use cases to the platform, Alexander anticipates enhanced capabilities that will support Sentara's growth goals through contract automation and data insights.

Key benefits include:

- **Enhanced Proposal Management:** Centralizing proposal processes through the Salesforce integration gives leaders greater visibility. "We can align our products with customer needs more effectively and provide more insight during product design," explains Alexander.

- **Scalability:** Automating previous manual tasks positions Sentara to scale its proposal processes in line with growth aspirations without significantly increasing operational costs.

- **Improved Broker Experience:** Streamlined proposal reviews enable brokers to receive proposals more quickly, enhancing their buying experience.

- **Reduced Risk Exposure:** Automation improves the management of proposal modifications, ensuring appropriate reviews are performed before proposals reach brokers. "Previously, information was sent to everyone; now, we've streamlined visibility based on specific modifications," shares Alexander.

By leveraging Icertis for contract lifecycle management, Sentara Health Plans is positioned to deliver exceptional value and customer experience through optimized proposal processes and enhanced operational efficiency.

About Icertis

Icertis delivers AI-powered insights and agentic automation to transform static contracts into strategic enterprise advantage. The Icertis Contract Intelligence platform revolutionizes how enterprises manage their customer, supplier, and partner relationships, enabling businesses to grow revenue, control costs, mitigate risk, and ensure compliance. Today, more than one third of the Fortune 100 trust Icertis to realize the full potential of millions of business relationships in more than 90 countries around the world.