ANVIL

Case Study: Spruce Health

The Company

Spruce Health is a technology startup in the healthcare space. They provide doctors with a unified communication platform for communicating with patients. Spruce Health's platform brings together text, phone, video, fax and email communication so that healthcare provider teams can work together and provide the best patient care. Alongside the communication tools, Spruce Health provides a whole suite of patient management tools to help teams stay up to date with patient information, track communication, provide patient care analytics and integrate with existing software systems.

The Challenge

Phone number transfer forms, necessary to transfer phone numbers to Spruce Health's communication platform were confusing to fill out, and time consuming for onboarding managers; processing them required multiple steps of manual paperwork and data-entry tasks.

In order to provide a unified communication experience, Spruce Health has to transfer existing phone numbers into the Spruce Health platform. However, the forms provided by phone service companies are antiquated and extremely confusing. They also require supporting documents, which were often missing. For a technology company, this was not an ideal user experience for onboarding new clients.

Once the documents were received, an onboarding manager needed to complete a series of manual tasks to complete the number transfer. The information was added into the tracking system so that phone number transfer could be properly managed by various members of the team. The forms also required signatures, which onboarding managers would manually download from email and then upload to DocuSign before individually sending out each signature request.

"Anvil helped us to streamline new customer onboarding, saving us time, and effort, all wrapped in a modern, web-based user interface."

Ari Steier / Customer Success

The Solution

Simplified workflow, automated notifications, less errors in completed forms.

Now, onboarding managers simply share a link to the Anvil workflow. Customers are guided through a series of simple questions that capture all the necessary information to complete the form, including the required supplemental documents. The Anvil workflow uses built in logic to only show relevant questions, eliminating customers' confusion over which pieces of information are needed.

Once an Anvil flow is completed, the customer is automatically taken to DocuSign to review and sign the completed document. A signed copy is automatically emailed to the Spruce Health support team, and a task with all of the relevant data is created in their task management system.

The Result

Improved customer experience, shorter onboarding times, increased operational efficiency.

With Anvil, Spruce Health can finally offer a customer onboarding experience that is in line with the experience of using Spruce Health's communication platform. Operational overhead with managing documents has been eliminated, and now a single onboarding manager can handle more clients with better customer service.