



**HEALTHPARTNERS
CENTRALIZES
THEIR DATA INTO
ONE SYSTEM
AND GOES 95%
PAPER FREE WITH
CUSTOMER AND
ACCOUNT INFO.**

CHALLENGE

Needed a complete platform replacement to centralize data and processes

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SOLUTION

Microsoft Dynamics CRM for salesforce automation

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BENEFITS

- Secure, centralized database
- Seamless salesforce automation for opportunity management
- Integrated with Connecture for quote management
- Integrated with other Microsoft technologies already used



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About the Organization

Founded in 1957 as a cooperative, HealthPartners is now the largest consumer-governed, nonprofit health care organization in the nation employing over 22,500 people. HealthPartners provides care, coverage, research, and education to improve the health of their members, patients, and the community. Health Partners serves more than 1.5 million medical and dental health plan members nationwide, including a multispecialty group practice of more than 1,700 physicians.

Challenge

HealthPartners had been working with another CRM partner for a decade when they received word that their system required a complete platform replacement. HealthPartners took this as an opportunity to look into a new CRM system that could better meet their organization's needs and they made the switch to Microsoft Dynamics CRM with PowerObjects as their new partner.

Overall, HealthPartners needed a CRM solution that would provide:

- Data centralization to make it easy to keep client information up-to-date and secure.
- Seamless Sales Force Automation (SFA) process for all opportunity management.
- The ability to integrate with Connecture, an ISV with a highly customizable quoting tool.
- The ability to integrate with other existing Microsoft technologies.

Solution

HealthPartners needed Microsoft Dynamics CRM to create seamless Sales Force Automation (SFA) processes for all opportunity management - such as the account management of brokers, individuals, and companies. They also decided to utilize Microsoft's SharePoint for out-of-the-box integration with extended custom code for automatic folder creation and customer security. This would improve the ease and efficiency of keeping client information accurate and up-to-date.

"Initially, we were only really looking for an out-of-the-box solution, but PowerObjects helped us look at our process and understand where we wanted to go with it," says Freda Myhrwold, Sales Process Manager at HealthPartners. "They were able to understand our needs, help with the implementation, and point out where we could improve and add to our system."

HealthPartners also needed their Dynamics CRM solution integrated with Connecture, an ISV with a highly customizable quoting tool. From the opportunity form within CRM, users can launch the quoting tool, which reads account and opportunity data from CRM. The quoting system creates new business and renewal quotes, saves them in SharePoint, and updates the status of the opportunity. With this system, users can view the actual detailed quote from right from the CRM quote record.

During this phase of implementation, HealthPartners ran into a timeout issue when integrating with Connecture. "We were all challenged to figure it out, but PowerObjects' strong relationship with Microsoft was a big help. Without the help of PowerObjects, we would not have been able to solve it," Myhrwold says.

ABOUT POWEROBJECTS

Established in 1993, PowerObjects is one of a handful of organizations recognized as a leader in delivering Microsoft Dynamics CRM/xRM solutions to customers. PowerObjects fully embraces the power of customer choice and offers hosted, on-premise and online CRM deployment options.

PowerObjects provides CRM solutions to businesses and non-profit organizations in multiple industries including healthcare, life sciences, insurance, financial services, publishing, distribution, manufacturing and professional services.

AWARDS + RECOGNITION

2012 + 2013

Microsoft Dynamics Partner of the Year

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2011 + 2013

Inner Circle for Microsoft Dynamics

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2009 + 2010 + 2011 + 2012

President's Club for Microsoft Dynamics

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Convergence Customer Excellence Awards

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GOLD + SILVER

Customer Relationship Management



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PRAISE FOR POWEROBJECTS

"The key difference between PowerObjects and our past technology partnerships is knowledge base. PowerObjects consistently proves that they have a solid knowledge base of CRM and have helped us to envision and execute on a broader scale than we even imagined."

FREDA MYHRWOLD
Sales Process Manager
HealthPartners

The integration with Connecture makes renewal management simple. HealthPartners gets the best opportunity management software with the ability to link a robust quoting tool to Dynamics CRM. Healthcare organization proposals are detailed and industry-specific. Being able to link Dynamics CRM seamlessly to Connecture was a crucial enhancement.

"The key difference between PowerObjects and our past technology partnerships is knowledge base. PowerObjects consistently proves that they have a solid knowledge base of CRM and have helped us to envision and execute on a broader scale than we even imagined," says Myhrwold.

Key Benefits

For HealthPartners, the ability to centralize their information into a single system was very important. Previously, all their information was scattered in different systems. With the implementation of Dynamics CRM, HealthPartners can now efficiently find information from different group opportunities and monitor the life cycle, including activities, documentation, quoting, and renewal. With the new processes HealthPartners has in place with Dynamics CRM, they are more than 95% paper free for all customer information and account files.

With their previous solution, HealthPartners had to track individual and group markets in two different systems. With the integration of Dynamics CRM and Connecture, HealthPartners can tie all broker information to one system, where broker, agency performance, and licensing can be tracked across group and individual health care markets.

Additionally, the use of workflows and dialogs has helped greatly in allowing the end user to manage changes that in a previous system needed technical support. Dynamics CRM has also made it easier to manage changes to workflows, dialogs, and templates – allowing HealthPartners the ability to make adjustments in process without having the expense of turning it into a project.

"Previous partners had tunnel vision and were only focusing on their own products to create a solution. They didn't recognize our broader needs and weren't willing to work with other vendors to develop the best solution for us. This held HealthPartners back in the past," adds Myhrwold. "PowerObjects was willing to develop a partnership and explore integration options with CRM, to ensure we had the best solution possible. Because of this, our system has more power than anything we have had in the past."

Microsoft Partner
2013 Partner of the Year **Winner**
Customer Relationship
Management