

HEXAWARE

Enhanced Cost Savings and Operational Efficiency with Dynamics 365 CRM for Health Insurance

Streamlined Workflows for Australia's
leading Healthcare Insurance Provider



Client

| Client

Challenge

Solution

Benefits

Summary

Our client is an international healthcare group serving over 22 million customers in 190+ countries. They offer health insurance and medical subscriptions and manage care homes, hospitals, and primary care centers.



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Their goal was to automate complex workflows and personalize customer experiences on a large scale to manage their diverse clientele effectively. With business growth and expansion, they faced several significant challenges.

- Disparate data sources from multiple lead generation channels created a fragmented view of customer interactions.
- The absence of a comprehensive Customer 360 view complicated data-driven lead engagement, limiting potential opportunities.
- Reliance on legacy .NET application ecosystems and manual processes in key areas like quote creation and KYC validation slowed sales cycles, risking prolonged dealings and revenue loss.
- Extended claims processing times led to poor customer experiences and increased attrition risk.
- Inconsistent customer service across channels due to siloed data practices hindered a unified service experience.
- Limited insight generation capabilities, resulting from the lack of a unified customer data source, restricted effective cross-selling and upselling, impacting sales growth.



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We worked closely with our client to create a robust solution that leveraged Microsoft Dynamics CRM integration and its technology stack to enhance efficiencies, drive operational excellence, and elevate customer experiences.

The solution key tenets include:
A Single View of the Customer: We created a comprehensive view of the customer by integrating Dynamics CRM with the client's systems, including the website, eKYC, PIM, Policy Engine, and Data Warehouse. This customer view compiles key elements such as customer identification, policy details, claims history, billing, payments, financial information, and interaction logs into a comprehensive profile. This integrated approach facilitates improved service delivery and personalization by enabling a seamless flow of information across various systems.

Streamlined Lead to Order Process: We enhanced the management of the entire lead lifecycle, from acquisition to conversion, by implementing automated systems in Dynamics that closely adhere to stringent service level agreements (SLAs). This included intelligent lead scoring, rule-based allocation, automated email

communications, and custom customer record routing based on insurance type, ensuring efficiency, timely updates, and accurate team assignments. Additionally, we:

- Simplified and automated product offerings through streamlined configurations, bundling, and one-click quote creation.
- Developed a user-friendly self-service onboarding portal with AI-enabled tools for quick and accurate form completion, enhancing customer experience and accelerating onboarding.
- Leveraged insights to improve customer service, identify cross-selling opportunities, and enhance chatbot capabilities for immediate responses to common inquiries.
- Automated approval processes to expedite service delivery for lower-risk clients and implemented legal document generation with e-signature capabilities to enhance verification.
- Fortified security and compliance through auditing and session management utilities, automated document scanning, and verification.
- Strengthened the SLA-driven approval processes to include email integration and automated calendar event creation to streamline and expedite approvals.

Streamlined Claims Management Process:

The roadmap involved enhancing the Dynamics Power Portal, streamlining the claim creation and management processes, and integrating direct billing functionalities to greatly improve the provider experience. By leveraging the AI Builder Connector within Power Automate Flows, form processing for claims and billing has been streamlined, improving efficiency within a unified interface. The solution also

- Extended integration within the system that helps generate comprehensive case records in D365 CRM, capturing detailed notes and activities for streamlined case management and follow-up.
- Integrated SharePoint for swift access to claims documents from D365 CRM, enhancing productivity by reducing document search time and expediting claims handling processes.
- Implemented sophisticated dashboards to categorize insurance claims by urgency, ensuring prompt attention to critical cases and facilitating effective claims management.

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Support and Maintenance: The technical support team was empowered with a knowledge-based system to quickly resolve end-user issues, significantly reducing investigation time. Implementation of a chatbot with quick-fix solutions for common technical issues and how-to queries further reduced support tickets and streamlined daily user activities. Other highlights include

- Automated daily CRM system health checks reported via Power BI, minimizing manual intervention and preventing service interruptions.
- A reusable codebase to reduce development time and streamline code application across projects effectively.
- Streamlined code management and interaction processes using Azure DevOps, improving collaboration among development, support, and business teams.
- Integration of contact management that synchronizes details from legacy systems to Dynamics 365 CRM, featuring duplicate detection and daily automated reports for administrators.
- Adoption of the Scrum framework within Agile methodology enhancing daily activity tracking and issue resolution.



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- **Enhanced Customer Experience:** Shortened onboarding cycles and quicker claims processing, coupled with comprehensive customer insights, have drastically improved customer satisfaction.
- **Operational Excellence:** Reduction in manual tasks through automated workflows, legal document automation, and intelligent document processing.
- **Cost Efficiency:** Year-over-year decrease in support costs by 10%, alongside a 45% increase in productivity for support personnel.



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Summary	The client benefited from significant cost savings through legacy modernization and process enhancements for real-time transactions and regulatory compliance. Leveraging Dynamics 365 CRM for Health Insurance helped eliminate data silos and drive operational efficiencies. Data-driven actionable insights enabled personalized customer service and identified opportunities for cross-selling and upselling. The holistic roadmap helped the client achieve their goals of improved customer experience, operational excellence, and cost efficiencies.



About Hexaware

Hexaware is a global technology and business process services company. Our 30,000+ Hexawarians wake up every day with a singular purpose; to create smiles through great people and technology. With this purpose gaining momentum, we are well on our way to realizing our vision of being the most loved digital transformation partner in the world. We also seek to protect the planet and build a better tomorrow for our customers, employees, partners, investors, and the communities in which we operate.

With 50 offices in 19 countries, we empower enterprises worldwide to realize digital transformation at scale and speed by partnering with them to build, transform, run, and optimize their technology and business processes.

Learn more about Hexaware at www.hexaware.com.

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