



## Health Fund

With nearly 2 million members, this not-for-profit health fund – one of Australia's largest – aims to make a positive difference by delivering the best outcomes for its members and keeping the cost of health cover as low as possible.

### Services:

Salesforce Managed Services

### Salesforce Products:

Sales Cloud

Service Cloud

## THE CHALLENGE:

The health fund's Enterprise Digital Program Director is tasked with ensuring that all staff are equipped with the tools they need to best serve the needs of members.

“One of the strategic objectives of our organisation is about driving affordability when it comes to healthcare,” says the Enterprise Digital Program Director. “When staff know members and prospects better, they can be more efficient.”

To support this, the health fund wanted to migrate around 700 customer-facing and 300 backend staff to Salesforce Service Cloud and Salesforce Sales Cloud, to provide a 360-degree view of the customer. The goal was to improve both staff efficiency and the customer experience across different contact channels.

It turned to Simplus's Salesforce Managed Services to extend the capabilities of its in-house team and free up internal staff to focus on other initiatives.

Salesforce Sales Cloud allows the health fund to accelerate deals with intelligent insights, while connecting service across channels in real time. Salesforce Service Cloud allows it to personalise every engagement, while operating efficiently and at scale.

Together, they allow the health fund to rely on a single omni-channel platform in order to support staff in contact centres and branches, as well as through the website portal and mobile app. The cross-channel integration grants customers the ability to seamlessly begin a transaction via one channel and complete it via another.

**“Working with Simplus means that our existing in-house team has had much of those maintenance and day-to-day operational issues lifted from them.”**

“The Salesforce CRM platform plays a central role in serving the entire business need,” says the health fund’s Enterprise Digital Program Director.

“This provides near zero blind spots when it comes to interacting with our customers through any channel, in order to significantly enhance the customer experience.”

In relying on Salesforce as a cornerstone of its business operations, the challenge for the health fund was to take a more structured approach to Salesforce support. Not just to provide users with technical support, but also to support the planning and deployment of upgrades and enhancements.

“With Salesforce powering so much of the business, the quality of support is critical,” he says. “Our contact centres operate from early morning until late in the evening, plus our digital channels are available 24/7, so we needed a corresponding level of reliable support.”

“We have in-house Salesforce support and engineering teams to support the business, but we realised that we needed to bolster this with the help of a specialist partner – not just to provide break/fix support but also to be a trusted advisor when it comes to getting the most from Salesforce to support the business.”

**“Simplus enhances the Salesforce support available to every arm of the business, while freeing up internal staff to focus more on strategic projects and other initiatives.”**



## THE SOLUTION:



The health fund engaged Simplus Managed Services to provide a flexible, scalable and cost-effective solution to enhance its capabilities to manage and support their Salesforce instance.

### Increasing technical support

The health fund still maintains its own Salesforce helpdesk to offer Level 1 support, but beyond that it relies on Simplus's specialised services for escalated Level 2 and Level 3 support. Simplus was able to provide 24/7 support to cover both the health fund's contact centre and its digital customer channels.

"Working with Simplus, we can provide structured and SLA-driven support to our frontline staff as well as the rest of the businesses," says the health fund's Enterprise Digital Program Director.

"Simplus enhances the Salesforce support available to every arm of the business, while freeing up internal staff to focus more on strategic projects and other initiatives."



### Extending Salesforce's capabilities

Beyond relying on Simplus's Salesforce technical support capabilities, the health fund also benefits from Simplus's expertise when it comes to product delivery and extending Salesforce's capabilities.

This has changed the way the health fund can think about process improvements across the business.

"The unique thing that we found in Simplus's proposal was its strong methodology across the Salesforce managed services spectrum," he says. "They are attuned to our needs and fully understand the support parameters and expectations."

"Their expertise in the Salesforce platform does not just cover providing technical support, but also bringing that support and managed services expertise together in order to help us deliver enhancements and new business capabilities."

**“Simplus’s guidance allows us to conduct essential security enhancements and changes quickly, efficiently and safely. Its expertise is an invaluable asset when it comes to ensuring sensitive customer data always remains safe and secure.”**



## THE OUTCOME

Working in conjunction with Simplus provides the health fund's in-house team with additional bandwidth for meeting the needs of the businesses. The Simplus has responded to more than 200 tech support incidents, including an out-of-hours Priority 2 Incident on New Years Day.

"Working with Simplus means that our existing in-house team has had much of those maintenance and day-to-day operational issues lifted from them," says the health fund's Enterprise Digital Program Director.

"This enables them to focus on other objectives which deliver business value, safe in the knowledge that users across the business are in good hands when it comes to Salesforce support."

Simplus's robust managed services methodology and deep understanding of the health fund's environment makes for a smooth workflow when the health fund's system architects are planning new deployments or platform changes.

"A simple message to Simplus's managed services email group, explaining our requirements, is all that is needed and we know that it will all be taken care of," says the Enterprise Digital Program Director. "We can hand an entire project over to Simplus and get it done ASAP, without needing to pull teams of existing projects."

"That is a great compliment, given the complexity of our environment, it is commendable that a partner like Simplus can achieve this maturity level when it comes to truly understanding both our environment and our needs."

As the health industry increases its focus on data security, privacy and trust, working closely with Simplus also allows the health fund to take a more proactive approach to enhancing security and compliance efforts in order to protect customer data.

Cybersecurity is the number one priority across the sector and, as a health fund, the privacy and security of customers' personal information is paramount.

When Salesforce proactively approached the health fund to initiate a security review, Simplus engaged with Salesforce, conducted the review and then implemented the results – lifting the health fund's Salesforce Security Health Check score to 98 per cent.

"Simplus's guidance allows us to conduct essential security enhancements and implement changes quickly, efficiently and safely," he says. "By taking the lead on this security review, Simplus ensured we are well-prepared to face any challenge."

"Simplus's expertise is an invaluable asset when it comes to ensuring our sensitive customer data always remains safe and secure."

Key benefits of the relationship include:



Freeing up the health fund's internal IT team to focus more on strategic projects and other initiatives.



Delivering 24/7 support to cover contact centres and digital channels.



Bolstering the health fund's ability to deliver products and extend Salesforce's capabilities.



Enhancing the security of the health fund's Salesforce implementation.

Learn more about how Simplus partners with organisations to maximise the value of Salesforce.

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