



# CUSTOMER STORY

Are you struggling with disjointed business processes? Allium helped a major health insurance provider simplify complexities in their Salesforce org and make key improvements to advance their Open Enrollment operations, resulting in better automation capabilities, streamlined processes, and more valuable reporting.

 *TYPE OF COMPANY*  
**NATIONAL HEALTH INSURANCE PROVIDER**







 *LOCATION*  
**MIDWEST, USA**



## CHALLENGE

The customer needed to improve their workflows and processes in and beyond their Salesforce org. Customer painpoints included:

-  Difficulty navigating complicated workflows and reporting in Salesforce org
-  Unable to apply sustainable, scalable solutions in their existing instance
-  Trouble managing an outdated legacy marketing platform
-  Implementation quick-fixes with complex code left them stuck with no path for growth

# ACTION

Analyze complex flows in the existing Salesforce org and identify how to simplify and streamline them — all in one central location — and in time to execute for Open Enrollment.

1

Stabilize processes for easy management during Open Enrollment

2

Create better workflows for mail and call scripts

3

Enable notifications for easy, predictive customer followups

4

Build up-to-date custom data fields to compile and refine relevant data for use



# RESULT

Allium helped the customer elevate their Open Enrollment strategy. We stabilized processes, improved reporting — including welcome call reports — and activated trigger notifications, providing a more intuitive structure with a set process for quicker, easier customer followup.

## MEASUREMENT



- Better, more informed tracking of essential data
- Refined analytics and reporting capabilities
- Valuable success measurements

## AUTOMATION



- Notifications and triggers to nurture customer relationships
- Increased efficiency from new automations
- Improved customer connections and retention

## PROCESS



- Clearly defined workflows in one dashboard
- Simplified, intuitive framework
- Actionable next steps
- More transparency and understanding of project scopes



5-STAR CUSTOMER REVIEW

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