



# Engage Health Plans

CRM Built Specifically for Health Plans, Designed by Industry Experts, Powered by Microsoft Dynamics 365.

## Compete In a Demanding Industry by Focusing on the Customer

Purpose Built Relationship Management for the Health Plan Industry

**Hitachi Solutions' Engage** for Health Plans provides providers with a practical solution to effectively manage and foster profitable relationships across agencies, customers, brokers, and other partners. Our solution enables you to focus on all aspects of your business and the customer lifecycle, from relationship and engagement management to business development.

### Engage for Health Plans enables firms to:

- ✓ Find people with unmet insurance needs with rich analysis and segmentation tools that help you identify the best prospects inside and outside of your existing customer base
- ✓ Convert leads to policy with structured processes for follow-up, advancing opportunities in the pipeline, and bringing new plans on board quickly
- ✓ Better serve your members by giving everyone an up-to-date view of leads, opportunities, and upcoming activities that are customized to their job role
- ✓ Foster stronger relationships across members, agencies, brokers, and third-party partners by giving everyone a consistent view of member, plan, and business data
- ✓ Streamline the group onboarding and renewal process from end-to-end, giving everyone visibility into execution and data at every stage so they can work together efficiently

## Industry Specific Modules

With five out-of-the-box health plan specific modules, Engage for Health Plans enables your team to focus on all aspects of their business and the customer lifecycle, from relationship and engagement management to business development.

### Group Plan Administration Module

Process plan onboarding and renewals quickly and efficiently giving everyone full visibility into the process and clear next actions to drive completion. The Group Plan Administration module gives health plan administrators a comprehensive end-to-end platform for managing onboarding and renewals that engages everyone in the process.

#### → Group Segmentation

Deepen your understanding of your customers and effectively group and segment them by company, organization, division, plans details or any other data point

#### → Onboarding and Renewal Management

Automatically create, assign, and track all tasks and information associated with plan onboarding so your teams can process new customers quickly and efficiently

#### → Implementation Management

Speed implementation and capture changes efficiently with automation and management for the implementation process

#### → Report Implementation and Summary of Benefits

Create scheduled reports and summary of benefits documentation automatically on schedule, saving everyone time, and ensuring the highest degree of accuracy

### Member Care Module

Truly focus on providing superior member services by giving everyone a complete view of member information along with intuitive service tools. The Member Care module helps you provide better service in the call center and manage interactions across service, marketing, billing, and all other touch points.

#### → Member 360

Provide a complete view of member data, no matter where it's stored, so you can communicate the right message and resolve service requests quickly and accurately

#### → Telephony Integration and Call Center Console

Give call center agents a consolidated desktop that exposes customer information, service apps, and guidance in the context of every service call

#### → Case Management

Improve resolution by capturing customer information and efficiently managing cases from end to end

#### Member Portal

Improve member satisfaction with access to on-demand information to support greater collaboration between members and providers

### Group and Individual Sales Management Module

Better convert leads and help sales and marketing collaborate on winning premium. The Group and Individual Sales Management module provides dashboards, performance management, and automated tasks to help you execute better across the entire lead-to-premium lifecycle.

#### → Opportunity Management

Improve how you execute on sales opportunities with better collaboration, tracking, and process management

#### → Group and Individual Segmentation

Grow premiums by zeroing in on good leads, including group opportunities in your area or individuals who have recently moved off a group plan

#### →

#### Lead Management

Streamline and automate how you manage leads and ensure consistent follow-up on leads generated from the exchange

### Distributor Relationship Management Module

Make it easier for your distributors to work with you and turn the strength of your distributor relationships into a powerful competitive differentiator. The Distributor Relationship Management module provides performance management and superior visibility into your distributor network along with tools that promote greater ease of doing business.

#### → Agent and Broker Performance Management

Improve visibility into distributor performance, such as premium goals and submissions, so you can understand the value of the relationships and find opportunities to work together better

#### → Agent and Broker Sales Plans and Call Reports

Make sure you're well prepared for each interaction or agency visit, with a complete understanding of performance metrics, interaction history, and recommended actions

#### → Agent/Broker Portal

Enable your distributors to interact with you through a web portal that makes it vastly easier to find and share information, stay connected, and work together to achieve desired outcomes

#### → Interaction Journal

Track your interactions with your distributors so you can understand your relationship history and track how it's changing over time

## Member Integration Toolbox

Establish a true, 360-degree view of each member by rapidly integrating disparate systems in accordance with industry best practices. The Member Integration toolbox helps you aggregate member and plan data from policy administration, claims, billing, imaging, document management, and other systems so you can put that data to use.

## Provider Service Module

Engage for Health Plans helps store, represent and manage all the complexities in provider information and relationships. The Provider Services module gives you visibility into provider organizations, including basic organization details, activities, and grievance management.

- **Provider 360**  
Put member information from multiple back-end systems into one view, including policy, claims, and billing
- **Provider Calls and Visits**  
Easily search across agencies or members to quickly identify each caller and provide details without hunting around for the information you need
- **Grievance Management**  
Automatically pop up customer information in the context of each call so that the agent already has the information they need when the call starts

### Get Started. Request a Customized Demo.

Interested in learning more about Engage for Health Plans? Get a customized demo to see how you can re-invent your business solutions.



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Call Us at 888.599.4332

## Why Hitachi Solutions

We offer deep industry expertise combined with decades of experience providing high-value solutions that deliver rapid return on investment. Our approach is designed to give you a faster, lower-risk implementation and rapid adoption through proven best practices.

1

It starts with **core technologies** built on Microsoft Dynamics 365 so you can get up and running quickly

2

We extend that with our own **industry modules** that give you capabilities tailored to the needs of the insurance industry

3

Finally we deliver a **customized solution** to provide the best fit for your business, so you can focus on your unique strengths, not on basic technology