

## **CONTACT MANAGEMENT, ACCOUNT MANAGEMENT, AND OPPORTUNITY MANAGEMENT SYSTEMS FOR MANAGED CARE ORGANIZATIONS**

Number of Sales and Marketing reps is important when it comes to the Customer Relationship Management (CRM) systems, technology and processes used by your Managed Care Organization (MCO).

Small MCOs, with fewer than 10 people in Sales and Marketing, typically have simple manual processes for prospecting, quoting and selling to new members. Simple Personal Information Managers (PIM), like Microsoft Outlook and ACT!, do the trick for them. On the other hand, older legacy systems or oversized complex systems, like Siebel and SAP CRM, often appear in the over 1000 sales and marketing reps category due to mergers from years ago.

According to the last HMOZ Customer Relationship Growth Forecast report, the most profitable MCOs have between 10 and 950 sales and marketing reps. Gartner Group observers named SalesLogix to be the market leader in Customer Relationship Management with over 25% market share and the best fit for this size Managed Care Organizations.

The MCOs that use SalesLogix have automatic reports for number of sales, calls, quotes, new sold groups, and member signups, reported down to the individual rep.

This measuring enables a goal-focused organization to outperform its regional competitors. While almost all MCOs in HMOZ report had processes created for drip marketing, prospecting, qualifying, quoting, and enrolling, only the top 25 percent growth-wise have automated all of these manual processes, and another 50 percent of these MCOs are planning to do this within the next 12 months.

Three major reasons why MCOs are automating their processes and moving to one centralized sales and marketing CRM system are to:

1. Increase the productivity of sales and marketing reps
2. Reduce the high cost of missed opportunities due to inaccurate data in multiple detached systems
3. Automate performance reports by rep, county, industry, plan design etc., and give management the ability to make the best decisions.

## **TELEMAGIC – ACCOUNT MANAGEMENT SYSTEM FOR MANAGED CARE ORGANIZATIONS**

TeleMagic is a family of database software programs for contact-centric Managed Care Organizations. It has an underlying structure based on the feedback of 500,000 users during the last 2 decades.

TeleMagic is a network application that can support up to 100 users and a million of companies, contacts, proposals, quotes, plan designs, documents and activities. TeleMagic is unique in its adaptability to support sales and sales management, telemarketing and customer service in MCO.

You can create up to 253 user-defined fields in each of the 3 levels of the relational contact database. These fields can be formatted, validated, and calculated automatically. The three levels can be used to model your business structure in a grandparent-parent-child relationship.

In addition, you can create and link Activities, Sales Forecasts, Branched Scripts, Faxes and Word Processing Merge Documents to any record at any level in any database. Administrators have complete control over screen design, field-level security, data entry validation, pick-lists, filters, indexes, and reports.

## ACT – CONTACT MANAGEMENT SYSTEM FOR MANAGED CARE ORGANIZATIONS

ACT! has over 3.2 million users worldwide. This contact manager is ideal for MCOs with fewer than 10 sales reps.

ACT! has done an excellent job of handling contact and customer management needs. However, as your business grows, you may require additional capabilities such as robust opportunity management and forecasting, marketing automation and service and support solutions, all designed to manage customer interactions across your entire organization.

## SALESLOGIX – CRM OPPORTUNITY MANAGEMENT SYSTEM FOR MANAGED CARE ORGANIZATIONS

SalesLogix is as easy to use as ACT!, and at the same time it provides MCOs with the additional functionality they need to acquire, retain and develop profitable customer relationships.

### **Are You Ready for CRM? You are if you need to:**

- Access one centralized database for a complete view of all customer interactions, from sales and marketing to customer service and underwriting
- Launch targeted marketing campaigns and measure effectiveness
- Gain greater visibility into your pipeline for more accurate forecasting
- Track and resolve customer questions, issues and plan coverage inquiries quickly for a high-quality customer experience
- View customer transactions including quotes, orders, plan designs and renewals through integration with your accounting system
- Tailor the solution to meet your unique business requirements

SalesLogix is complete and reliable Customer Relationship Management tool for MCOs, which allows to gain your prospect's attention, close sales and provide exceptional customer service. For teams of 10 to 1000 people, it is possible to be focused and proactive regardless of where they are.

Improved Marketing Processes and full Campaign Management ensure the most effective results tracking. Sales receive complete, easy to use information and strengthen relationships with prospects. SalesLogix also incorporates leading Internet and emerging mobile technologies.

SalesLogix® SQL/Oracle is a fully integrated customer relationship management suite encompassing Sales, Marketing, Support and assisted-selling components. Its superior functionality, end-user focused design, and "in-house" customization abilities provide a cost-effective CRM solution with greater user acceptance, quicker deployment, and rapid ROI while maintaining a strong focus on sales.

SalesLogix provides MCO users easy access to customer information and the ability to stay informed and manage their business contacts, accounts, and opportunities more effectively and efficiently. Managed Care Organizations benefit from the affordable price, revenue-generating potential and rapid ROI.

SalesLogix provides remote database connectivity and field-level synchronization, enabling reps in the field to quickly and easily share information with those at the main office. MCOs also have field-level security, giving sales people access to the information they need while ensuring the integrity of sensitive data. You can embed an organization's best sales and customer service practices and marketing processes directly into the HMOZ SalesLogix.