

HealthCare Sales Automation – Past Project / Case Study

Project Title: Sales Automation on Pega SA for Healthcare

Project Type: Software Implementation

Industry: Healthcare / Payer

Business Unit: Information Technology

Duration: 3+ years

Size of Organization: Large Enterprise

Function: Information Technology

Location: Remote / Global

Problem:

This client is a large Healthcare Payer. Their sales process, geared to establishing new members and managing renewals for existing members was operating on a 10+ year old platform. The legacy system had been customized to meet the changing business landscape. Data was resident in too many locations, often duplicated and not consistent. Processes were not well defined and had obsolete steps. The technology was outdated, costly, and unmanageable to maintain.

Action:

With business and IT goals defined, a revamped process was needed while keeping aligned to their enterprise modernization strategy. The direction was to implement Pega Sales Automation for Healthcare (SAHC). Deep discovery was carried out to understand the scope of work, and involved client stakeholders / SMEs, SI consultants, and Platform Partner members. Business process and architecture was critical, as was technical implementation, integration points, data migration and E2E testing.

Result:

The new Sales Automation solution was successfully launched, implementing (1) a simple Member Profile Management capability, (2) a clear sales process from Lead Generation ->

Prospects -> Pursuit -> Close / Enrollment, and (3) a bulk renewal process. Along with data cleansing & migration, the business impact is significant new member enrollment and increased renewal rates, and higher member delight. The solution was deployed on PegaCloud and complied with IT enterprise mandates.

Deliverables:

1. Discovery Plan, Discovery Conclusions & Recommendations, Discovery Readout Presentation
2. Program Roadmap / Delivery Phases and Timeline (Sprint / Release Roadmap)
3. Business Requirements (Epics in Jira)
4. Detailed Requirements (User Stories in Jira)
5. Architecture / Design Framework
6. Unit Test Cases - documented with results
7. Data Migration Strategy / Plan (data analysis, data mapping, data cleansing)
8. Data Migration Scripts – with Data Test Plan & Results
9. Test Strategy / Plan
10. Functional and Non-Functional Test Cases - documented with results
11. Fully Tested (unit, system, integration, and UAT) Pega Application
12. Application Deployment Guide w/Operational Procedures, Troubleshooting
13. Governance / Status Presentation - comprehensive