

CUSTOMER SUCCESS



## Sage SalesLogix Helps BCBST Cut Sales Quote Development Time in Half

Salespeople at BlueCross BlueShield of Tennessee (BCBST) had been using a contact management system that was, as Andrea Cooling, marketing consultant and project manager for the company put it, “very antiquated.” With a growing business selling through a three-pronged salesforce, BCBST knew it was time to upgrade.

### Flexibility, Cost, End-user Acceptance

“We looked at many different products,” Cooling recalled, including Pivotal. “We knew we would have to highly customize whatever we bought because everybody does business differently. Sage SalesLogix fit the bill in that respect, as well as in cost.”

Sage SalesLogix offered another key to CRM success: salespeople would use it. Cooling said, “The way it looked on the screen was very attractive to our end-users.”

### Improved Processes

“We wanted to overcome a lot of inefficiencies we were experiencing with the old system,” Cooling said. “Typically, a broker might send in one request for a quote, but with 14 options, that’s 14 individual quotes.” Every bit of information for each quote had to be entered manually, so the time devoted to preparing quotes was staggering. And they were all stored on individual salespeople’s computers and could not be shared.

### Quotes in Half the Time

“Today, we have it all within Sage SalesLogix,” Cooling said proudly. “We have the ability to change only specific elements to generate variations. And individuals working in the same office can share their work.” The efficiency gain was immediate. Previously, it took 5-10 minutes to generate a typical quote. Now, with Sage SalesLogix, it takes half that time. Cooling observed, “When you’re talking about an office that runs 60 or 70 quotes a day, that’s a lot of time saved!” The savings multiply when it’s time to renew a policy because current and past quotes can be modified to meet customers’ changing needs. Salespeople are also now automatically prompted to offer additional products.

**Customer:**

**BlueCross BlueShield of Tennessee**

**Industry:**

Health care financing

**Location:**

Chattanooga, Tennessee

**Number of Employees:**

Approx. 4,000

**System:**

**Sage SalesLogix**

**CHALLENGE**

To replace a homegrown contact manager with a fullfeatured CRM solution that: could be tailored to meet changing business needs; was affordable; salespeople would use.

**SOLUTION**

A Sage SalesLogix system designed to meet current needs, as well as update and improve business processes, increasing sales teams’ efficiency and ability to share customer information.

**RESULTS**

Quote development time cut in half; critical sales information now shared; Web-based solution rolling out to brokers statewide; back-office integration phased in.

**Web Rollout to Brokers, Customers, and Prospects**

The overall renewal process has improved, too. Instead of 500 pages of paperwork, account managers now receive documents electronically through Sage SalesLogix, improving efficiency and giving them greater flexibility in managing their workload.

The system is already used by 350 BCBST employees, it's rolling out to about 250 independent brokers via the Web, and soon customers and prospects will be able to access a portal for estimates.

**More Back-Office Integrations Coming**

Now, more back-office applications are being integrated with Sage SalesLogix. Snapshots of each month's billings are currently available in Sage SalesLogix and BCBST is integrating information about which brokers and account managers are assigned to which customers. Interfaces with the company's claims-processing and financial information systems are also in the plans.

**"Everything at their fingertips"**

Cooling said, "When we trained people and they saw what Sage SalesLogix could do for them—the time it could save—they really went for it. We have definitely increased productivity and proficiency, and cut down on manual work."

"Now when you talk to some of the people who were apprehensive at first, they love it. They have everything at their fingertips!"

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