

Bupa Sales Campaign Manager



"Our business is already reaping huge rewards in terms of improved cash flow. All in all a great success with minimum disruption and maximum benefits"

Martin Kirby
AR Manager, Bupa Wellness

"ConnectSales is flexible, innovative and rapidly implemented. It has had a huge impact on customer satisfaction, cash flow and even on resource costs."

The Problem

Wellness has over 6,000 corporate customers with more than 200,000 employees eligible for health checks at predefined intervals.

Manually processing 200,000 records every day to decide eligibility and recall based on contract terms, seniority, age and sex resulted in Wellness failing to meet agreed levels of service and was impacting profitability, potential growth and customer relationships.

An intelligent solution to this ever-growing problem was needed quickly.

Any solution had to utilise the existing ERP data, be quick and easy to implement, needed to meet the current and future needs of the client and finally, improvements had to be gained in time, cost and manpower from day one.

The Issues

- Huge customer base
- Complex, multi-stage assessment
- Manual processing too costly
- No suitable in-house IT systems
- No means of managing booking
- Open to significant error
- Labour intensive

The Solution

In less than 8 weeks the Connect Sales Campaign application was plugged into Bupa Wellness' existing ERP system to rationalise the process of identifying and recalling eligible employees.

The Connect Campaign Management Application is running seamlessly with Wellness' existing system meaning no new hardware, software or 'in seat' licensing was required.

The product was rapidly configured to meet the exact and changing needs of the business, keeping staff training to a minimum.

As Connect is an Internet-hosted application the data is stored securely off-site meaning no costly additions to Wellness' infrastructure and no increases to in-house IT department workloads.

The Deliverables

- Automated workflow & rules
- Clear list prioritisation
- Handles full campaign process
- Manages call-centre staff
- Handles all booking & recalls
- Capacity management
- Full reporting
- Activity dashboards
- Management Information

The Results

Every eligible candidate is now recalled when their health check is due and every possible appointment is made which has resulted in significantly higher bookings and increased revenue.

Health check candidates are automatically prioritised so that appointments are made at the right time and service levels are met.

Wellness centre capacity management is optimised by allocating health checks to the nearest centres with available capacity. Customer service is now to a standard Bupa Wellness can be proud of and staff are utilised to their best potential.

These business benefits have transformed Bupa's health check recall process such that it meets demanding targets.

Connect Campaign Manager provides Bupa Wellness with the tools to market, deploy and manage new health products and campaigns at the pace set by the business, not dictated by IT.

The Benefits

- Identifies & books patients
- High customer satisfaction
- Hits demanding business targets
- Major Increase in revenue
- Significantly lower costs
- Maximised profitability
- Maximises staff resources
- Optimises core ERP investment

The Client

Bupa Wellness is a division of Bupa providing health services via its Employee Assistance programmes to over 6,000 corporate customers throughout the UK including major supermarkets, airlines, manufacturers and financial institutions. It also caters for tens of thousands of people with individual Private Medical Insurance (PMI).

