

# Bupa Triage 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

Bupa Wellness identified a significant growth area for their business in the treatment of patients needing orthopaedics intervention.

With over 200,000 corporate client employees, manually identifying people with an immediate need for orthopaedics treatment or those who would potentially benefit from such treatment was a huge task.

With no existing automation, a manual process for assessing suitability (triage) was unthinkable in terms of staffing, cost and time.

In order to realise the benefits of this growth area, Wellness needed to radically revise the whole process of identifying suitable employees, assessing their needs and booking them for treatment.

## The Solution

In just eight weeks the invoicing system has been totally transformed and the application is configured to work seamlessly with Wellness' preferred processes and data streams.

The Connect Campaign Management application works seamlessly with the existing Bupa ERP and new candidates identified by external agencies.

Lists of suitable clients are now generated on a daily basis and managed through the multi-stage triage process with a workflow driven questionnaire correctly identifying their suitability for treatment.

Once identified, an appointment is booked immediately at the nearest centre most suitable for the patient.

The entire process from start to finish, is now managed from within the Connect application.

## The Results

The Connect solution is delivering significant and quantifiable service benefits to Wellness' clients.

In addition, the application provides a highly efficient means of accurately identifying potential patients, correctly assessing needs and thus increasing revenue for Wellness. All this means the right clients get the treatment they need when they need it.

Incredibly, these benefits are also provided at greatly reduced cost, allowing Bupa Wellness to maximise profitability and demonstrate business excellence to its customers whilst optimising investment in its original ERP solution.

## 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 Deliverables

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

## The Benefits

- Assesses patient needs
- Identifies & books patients
- Increased revenue for Wellness
- Significantly lower costs
- Maximised profitability
- Customer satisfaction
- 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).

