



## CASE STUDY

## INSURANCE



# BUPA International Optimises Customer Interactions with GoldMine

**Company Name**  
BUPA International

**Industry**  
Insurance

**Web site**  
www.bupa-intl.com

**Solutions Partner**  
Name Solica Consulting Ltd  
URL www.solica.com

- Business Benefits**
- More effective coordination of customer and prospect contacts, helping BUPA International staff giving a better service
  - More efficient customer communication
  - Substantial saving on custom software development
  - Better staff management

### BACKGROUND

BUPA International is the leading provider of expatriate medical insurance. To support sales operations, BUPA International successfully used GoldMine 3.2 for some years, but the growth in the database and new business requirements were stretching this system.

As members became more demanding, BUPA International planned to develop a bespoke CRM system to form the foundation of a new member management solution. BUPA International planned to use GoldMine as an interim solution while the bespoke system was developed. As a result, FrontRange Solutions Partner, Solica Consulting was engaged to review and upgrade the existing GoldMine solution in-line with the new business procedures plus provide the appropriate end user training. Solica worked in close collaboration with BUPA International to redevelop the existing system and migrate it to a Microsoft SQL platform, which was rolled out over a weekend.

BUPA International considered the new configuration to be very successful, providing higher capacity, improved usability and resilience. Training allowed users to exploit the power of the system, giving improvements in customer service and productivity.

### INTEGRATION WITH WEB & BACK OFFICE

Solica continued to work with BUPA International to exploit the power of GoldMine. Over the next two years a number of enhancements were introduced including:

- Automatic capture of web leads from the BUPA International web site, including extensive details of each quotation

requested, to streamline the customer experience.

- Data from the Oracle-based membership system is automatically transferred to GoldMine using GoldMine add-on, Inaport. This integration ensures customer service and sales personnel always have the most up to date information to hand.
- All communications were standardised in GoldMine particularly email transactions.

Following the system overhaul, BUPA International considered the functionality provided by the new GoldMine system was sufficiently rich that there was no need to continue with the bespoke CRM project build.

GoldMine has also been expanded to support the Marketing Department. The team is better able to exploit the database, for example by targeting lapsed members or possible customers who had obtained quotations but not proceeded to a purchase.

### CUSTOM DEVELOPMENTS

BUPA International continues to develop the solution; recently Solica has worked with BUPA to develop custom software to integrate GoldMine more closely with the quotation process. In particular:

- A quotation wizard to lead sales staff through a sales process, writing data directly to GoldMine.
- A web service connecting GoldMine directly to the web site streamlines data entry from web forms. Where prospects obtain quotes the information



is instantly stored in GoldMine and automated business processes are initiated to help provide a faster and more responsive service.

#### **REPORTING**

Using GoldMine, BUPA International is now able to closely monitor the lead pipeline and the operations of its customer-facing teams. The reports generated by GoldMine enable team leaders to measure effectiveness by tracking the sales generated against sales forecasted.

The BUPA marketing team analyses the effectiveness of individual campaigns to existing and new members. This information is then used to repeat successful initiatives and make sure that any unsuccessful campaigns are reviewed and refined.

#### **VISIBLE COMMUNICATIONS**

With an international membership, continuation of service is particularly important. It was becoming increasingly apparent that professional, high worth members were becoming less tolerant of the delays caused by using the postal service for official documents when email is a faster and more reliable service. The GoldMine solution enables any agent to provide a continuously high level of service to members no matter which time zone they are in by accessing past communications, scheduled activities and any overdue actions.

GoldMine was therefore configured to be the primary email client, ensuring that all such communication became part of the GoldMine customer record. As well as improving the efficiency of standard email communications using the InfoCenter feature.

BUPA International took the opportunity to integrate voice calls into the history items within GoldMine. This is another initiative to speed up processes and procedures for members. By linking the phone system to GoldMine, BUPA agents are now able to record important phone calls and store them as contact history. This feature has decreased the lead to sale time dramatically

because contracts can be agreed verbally and then followed up with paperwork.

“It was easy to justify spending the money on GoldMine and its enhancements. We predicted that it would have cost at least £1M million to develop our own back office CRM solution. GoldMine including its enhancements cost us a fraction of that. Solica’s technical expertise, innovation and understanding of our business processes has given us an excellent system which been able to evolve as our requirements changed.” Paul Tidy, Information Systems Director, BUPA International.

#### **BENEFITS**

BUPA International has a number of groups of users dealing with inbound and outbound calls, for both individuals and group or company memberships. Each team uses the same integrated GoldMine system. This has provided the company with many benefits, including:

- More effective coordination of customer and prospect contacts, helping BUPA International staff giving a better service
- More efficient customer communication
- Substantial saving on custom software development
- Better staff management.