



## ABOUT THE ORGANIZATION

Medica is a health services company headquartered in the Twin Cities and active in the Upper Midwest. With approximately 1.5 million members, the non-profit company provides health insurance coverage in the employer, individual, Medicaid, Medicare and Medicare Part D markets in Minnesota, Iowa, Nebraska, North Dakota, South Dakota and Wisconsin. Medica also offers national network coverage to employers who have employees outside the Medica regional network.

## CHALLENGE

Medica has experienced significant growth over the last five years, including tripling its membership base. But the organization lacked insight into the exact activities leading to their success. To ensure they were taking the right steps to replicate this success over time, Medica needed to be able to drill into more specific data.

“The transparency of the data, the ‘how and why’ what happened, was a little muddy for us,” says Mike Daly, Director of Sales at Medica. “Our results have been fantastic—what’s been missing is the clarity between point A and B, point A being the start and B being someone who actually buys from us.”

Medica had been using a system they called Lead and Membership Management, or LAMM, which functioned as a simplified version of customer relationship management (CRM). A Java-based application built internally at Medica, LAMM focused primarily on sales and some basic marketing capabilities. However, the LAMM system provided limited access to important data. “We had a lot of really good data, but it wasn’t easily accessible,” says Cody Balk, CRM Administrator at Medica. “You really had to have a developer go in to the application just to access the data, let alone take something meaningful from it.” After investigating and vetting products and partners, Medica decided to implement Microsoft Dynamics CRM, with PowerObjects as their partner.

## SOLUTION

Medica needed a solution that would give them better insight into their data and that would:

- + **Nimble adapt and change to Medica’s evolving business**
- + **Give end-users easy access to data and business intelligence**
- + **Integrate with other Microsoft products in use at the company such as Outlook**
- + **Enable effective communications across departments**
- + **Provide the ability to extract, update, and modify data without needing developer resources**

PowerObjects helped Medica implement a Microsoft Dynamics CRM solution tailored to their unique needs within a short timeframe. The solution provides Medica with streamlined processes for marketing and salesforce automation, as well as the ability to track customer purchase history and interests. The system also has built-in compliance requirements for Medicare.

*MEDICA USES MICROSOFT DYNAMICS CRM TO GIVE USERS EASY ACCESS TO BUSINESS INTELLIGENCE, ENABLE EFFECTIVE COMMUNICATIONS ACROSS DEPARTMENTS, AND MAKE SMARTER BUSINESS DECISIONS*

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*“CRM allowed us to tighten up what reps were attacking day in and day out. We generated more sales, and our conversion rate was as high as it’s ever been.”*

**MIKE DALY**  
 Director of Sales  
 Medica

## BENEFITS

Medica’s implementation of Microsoft Dynamics CRM has allowed the organization to communicate cross-departmentally and has given them key insights into their successes. Their customized solution provides them with the data they need to make smart business decisions.

Daly equates the move to Microsoft Dynamics CRM to turning on a light switch. “We were walking around a really dark room, feeling our way around and stumbling on some things,” says Daly. “With CRM, we’ve found the light switch. We’re starting to see where we’ve been and where we’re going.”

One of the major benefits of Medica’s switch to CRM was the speed at which it could be implemented and adopted. With the help of PowerObjects, Medica was able to roll out CRM and ramp up user adoption within a span of five months. “Having PowerObjects there to help us implement Microsoft Dynamics CRM went a long way in us being able to use it effectively and the speed with which we got up and running,” says Daly. “I don’t believe we would have experienced that same dynamic with other solutions or partners.”

With Microsoft Dynamics CRM, Medica no longer relies as heavily on help from developers to customize the system. As the administrator for their CRM system, Balk can take on customizations himself. “That has been very empowering,” says Balk. “It’s nice to be able to have a vision and execute it without having to secure a developer’s time.”

The team can also now easily extract, update, and modify data and use data for time-sensitive projects. “We’ve had a few different initiatives where we wanted to do ad hoc marketing during our busy sales season,” says Balk. “I have the ability to go in and easily extract actionable data. In the past, that would have meant submitting a ticket to work with a developer or a data person to get the data.”

The ability to easily access data benefits both end-users as well as administrators at Medica. “Our old system had data squirreled away in places that were not accessible by most end-users,” says Balk. “Now we have dashboards and reports; things at people’s fingertips where they can pull meaningful data and use it in meaningful ways.”

With the tool, sales representatives can be more organized in their everyday tasks, and ensure things don’t fall through the cracks. It allows reps to plan out their day and track every interaction. If sales reps know they need to follow up with a customer, the interaction is tracked and synced up with their Outlook client. “CRM allowed us to tighten up what reps were attacking day in and day out,” says Daly. “We generated more sales, and our conversion rate was as high as it’s ever been.” The ability to track every interaction with customers and prospects has correlated with the highest conversion rate Medica has ever seen.

PowerObjects also helped Medica develop a custom entity in CRM called the Plan Detail Record, which allows Medica to track specific sales efforts by segment. It provides a record of current sales efforts as well as membership history, and includes everything related to the contract sold, the effective date, and their member ID numbers.



## CHALLENGE

Medica needed a solution that would give them easy access to business intelligence, integrate with other Microsoft technologies, and enable effective communications across departments—all on a rapid timeline.

## SOLUTION

Medica implemented Microsoft Dynamics CRM with PowerObjects as their partner.

## BENEFITS

- + A rapid design, build, and launch timeline allowing Medica to roll out the solution quickly
- + Ability to extract, update, and modify data without needing developer resources
- + Consolidated customer history easily accessible from one place



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## BENEFITS |CONTINUED|

“The Plan Detail ensures we don’t lose data, and at the same time, consolidates the data we do have,” says Balk. “You can view a contact and see everything that’s happened from a sales perspective in one entity.”

Medica also needed PowerObjects’ help to integrate existing systems into CRM, including a broker tracking system that houses all broker core data. This system pushes agency and agent level information into CRM, which is used to note interactions with Medica’s brokers.

Additionally, Medica has a tool that allows Medicare prospects to sign up for workshops to learn more about the organization’s products. This RSVP system now integrates with CRM, so anyone signing up for a workshop is entered into CRM as a prospect and can be tracked within the system.

Medica’s vision for Microsoft Dynamics CRM doesn’t end with the current implementation. CRM plays a central role in their five year business plan and strategic discussions. “What’s important is the flexibility to continue to evolve what it looks like,” says Janet Bender, Manager of Sales Operations. “That’s critical in our notion of what our business is going to look like in 2016, 2017, 2018 and beyond.”

PowerObjects worked with Medica throughout the process of rolling out Microsoft Dynamics CRM, including the initial discovery process, requirements gathering, implementation, and user training. “We really looked to PowerObjects for best practices, and from their perspective what we needed to do,” says Daly. “Gleaning from that perspective and experience was incredibly invaluable.”

Medica’s experience with PowerObjects compared favorably with other technology vendors. “To have PowerObjects’ experts come in and help us down that path, to lead us where we need to be, and to actually give us the vision of what it will look like in the future, is invaluable,” says Bender. “You don’t always get that with vendors.”

“I would describe PowerObjects as a true partner,” says Balk. “Our partnership feels very human, very genuine, and very interactive. Some vendor relationships aren’t like that—often they are really focused on the technology or the service and don’t deliver much of a collaborative relationship. PowerObjects brings that and does it quite well.”

Balk sums it up the partnership as being comfortable and easy: “You guys fit like an old shoe.”



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