



LEVERAGING SALESFORCE FOR ACCOUNT MANAGEMENT

SCP Health is a leader in clinical practice management spanning the entire continuum of care, including emergency medicine, hospital medicine, wellness, telemedicine, intensive care, and ambulatory care. Based in Lafayette, LA, SCP Health leveraged CGI’s Lafayette delivery center and overall Salesforce capabilities to implement a streamlined, easily accessible and centralized account plans.

CHALLENGES

- Cumbersome and manual tracking of client retention plans (think spreadsheets)
- Inefficient and slow methods for sharing information
- Ineffective tracking of action items
- No integrated workflow
- Inability to share plans externally
- No solid reporting and no dashboards

SOLUTION

- CGI brought Salesforce knowledge and effective, interactive design techniques to jumpstart the project and move rapidly into production
- Centralized and immediate access to updated account plans streamlined interactions between Medical Officers and Operations Officers; allowed easier access to client engagement details; established standard workflows and monitor accounts
- Configuration integrated with real-time data; executive management dashboard; client retention/expansion KPI
- Standardization of field-level content enhanced billing and invoicing of resources across multiple entities

OUTCOMES

- Rapid implementation and roll-out using agile-like principles (sprint-based)
- Go Live: May, 2020
- Number of SCP Health users: 50 – 60+ including Medical Officers and Operations Officers
- 100% of team can now access information when/where they need it
- Project completed on time and within budget

GEOGRAPHY: United State

DATE: 2020

INDUSTRY: Health & Life Sciences

CLIENT: SCP Health – SCP-Health.com