

Sage SalesLogix | Customer Success



Challenge

BCBST needed to replace a homegrown contact manager with a full-featured CRM solution that could be tailored to meet changing business needs. It also had to be affordable and easily adopted by salespeople.

Solution

BCBST chose Sage SalesLogix to meet current needs as well as update and improve business processes, increasing sales team efficiency and ability to share customer information.

Results

Quote development time was cut in half, critical sales information is now easily shared, the web-based solution is rolling out to brokers statewide, and back-office integration is being phased in.

Customer

BlueCross BlueShield of Tennessee

Industry

Health care financing

Location

Chattanooga, Tennessee

Number of Employees

About 4,000

System

Sage SalesLogix

Sage SalesLogix Helps BCBST Cut Sales Quote Development Time in Half

Salespeople at BlueCross BlueShield of Tennessee (BCBST) had been using a contact management system that was “very antiquated” according to Andrea Cooling, BCBST marketing consultant and project manager. With a growing business selling through a three-pronged sales force, BCBST knew it was time to upgrade.

The Right Flexibility and Ease of Use

“We looked at many different products,” Cooling recalls, including Pivotal. “We knew we would have to highly customize whatever we bought because everybody does business differently. Sage SalesLogix fit the bill in that respect, as well as in cost.”

Sage SalesLogix offered another key to CRM success: salespeople would use it. Cooling says, “The way it looked on the screen was very attractive to our end users.”

Improved Processes

“We wanted to overcome a lot of inefficiencies we were experiencing with the old system,” Cooling says. “Typically, a broker might send in one request for a quote, but with 14 options, that’s 14 individual quotes.” Every bit of information for each quote had to be entered manually, so the time devoted to preparing quotes was staggering. And they were all stored on individual salespeople’s computers and could not be shared.

Quotes in Half the Time

"Today, we have it all within Sage SalesLogix," Cooling says proudly. "We have the ability to change only specific elements to generate variations. And individuals working in the same office can share their work." The efficiency gain was immediate. Previously, it took 5-10 minutes to generate a typical quote. Now, with Sage SalesLogix, it takes half that time. Cooling observes, "When you're talking about an office that runs 60 or 70 quotes a day, that's a lot of time saved!" The savings multiply when it's time to renew a policy because current and past quotes can be modified to meet customers' changing needs. Salespeople are also now automatically prompted to offer additional products.

Web Rollout to Brokers, Customers, and Prospects

The overall renewal process has improved, too. Instead of 500 pages of paperwork, account managers now receive documents electronically through Sage SalesLogix, improving efficiency and giving them greater flexibility in managing their workload.

The system is already used by 350 BCBST employees, it's rolling out to about 250 independent brokers via the web, and soon customers and prospects will be able to access a portal for estimates.

More Back-Office Integrations Coming

Now, more back-office applications are being integrated with Sage SalesLogix. Snapshots of each month's billings are currently available in Sage SalesLogix and BCBST is integrating information about which brokers and account managers are assigned to which customers. Interfaces with the company's claims-processing and financial information systems are also in the plans.

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– Andrea Cooling
Marketing consultant and project manager
BlueCross BlueShield of Tennessee

"Everything at their fingertips"

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"Now when you talk to some of the people who were apprehensive at first, they love it. They have everything at their fingertips!"

Note: Customer is a participant in the Sage Customer Reference Program and may be eligible for participation-based incentives.

About Sage SalesLogix

Sage SalesLogix offers a complete view of customer interactions across departments—providing information and insights for better planning, managing, and forecasting. Your teams will have the tools to increase sales, reach more profitable customers, enhance the customer experience, and anticipate customer needs. Sage SalesLogix offers flexible access, deployment, and payment options to address business requirements.

About Sage North America

Sage North America is part of The Sage Group plc, a leading global supplier of business management software and services. Sage North America employs 4,000 people and supports 3.1 million small and mid-sized business customers. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs 13,100 people and supports 6.2 million customers worldwide.