



# Helping Those Who Help Those In Need



## BACKGROUND

Alameda Alliance for Health (Alliance) is a public, not-for-profit, managed care health plan committed to making high quality health care services accessible and affordable to lower-income people of Alameda County. Established in January 1996, the Alliance was created by and for Alameda County residents.

The Alliance provides health care coverage to over 125,000 children and adults through four programs: Medi-Cal, Healthy Families, Alliance Group Care and Alliance CompleteCare.

## CHALLENGES

The Alliance is a salesforce.com customer and needed assistance to better support its growth. The Alliance has a team that conducts community outreach and enrolls Medicare/Medi-Cal “dual eligibles” into their Medicare Advantage Special Needs Plan for seniors and people with disabilities. One of their challenges is to systematically and scalably find individuals in the community who are qualified dual eligibles. Once qualified people are reached, the Outreach staff offer either an in-home, one-to-one presentation, or a presentation by phone.

The Alliance’s business development team needed to:

- Clean up their workflow and their data to create a more efficient, more scalable prospect management process to ensure that they reach all those in need in a systematic, timely and organized fashion.
- Organize their data so that outreach coordinators have all the information they need at their fingertips to provide better, more responsive service to the community.
- Produce reports to management on lead marketing activities and pipeline success to inform management’s decisions.

## ALAMEDA Alliance FOR HEALTH

Health care you can count on.  
Service you can trust.

## Vital Statistics

- Public, not-for-profit managed care health plan
- Founded 15 years ago
- Providing healthcare coverage to over 125,000 children and adults
- Based in Alameda, CA, USA  
<http://www.alamedaalliance.org>

## Business Challenges

- salesforce.com needed to be redesigned to better map to Alameda Alliance for Health’s organizational processes
- Data needed to be structured and organized to meet their needs
- Jumpstart the business development team on salesforce.com usage
- Visibility into metrics that drive the business
- More efficient outreach
- Better data tracking on each individual through the process

## Solution

Assessment, optimization and training of salesforce.com delivered by MondayCall Solutions

MondayCall Solutions performed an assessment, optimization and training. MondayCall Solutions performed several discovery sessions to understand:

- What KPI's drive the organization? What information is needed by management to gain the needed visibility to make decisions?
- What lead and account management processes are in place and how can they best be improved?
- What is the current outreach process and how can salesforce.com create and nurture prospects?

MondayCall Solutions then worked with the Alliance's management to create a best practices solution.

### Architecting the Right Data

Starting with the right data, and knowing how to access this data, is critical to a scalable solution. MondayCall Solutions worked with Alliance management and outreach coordinators to focus on identifying the right data and remove superfluous data fields that were not adding value. Prior to the clean up, the input form was likened to a "tax form." It was cumbersome and error-prone. MondayCall Solutions also focused on ensuring that the proper data was accessible and input into the system. For instance, by importing provider information into the system and incorporating them into picklists, the Alliance is now able to drive accurate reports based upon the prospect's provider. By providing better, more consistent doctor, hospital and clinic information, the Alliance is now able to better track individual prospect information, and which providers are referring their patients to the health plan.

*"Better data means better service. Our ability to store better information about our prospects helps us improve our services and increase our ability to better find those in need in the community."*

- Pat Protopappas  
Sales Manager for Alliance CompleteCare

## BENEFITS

### Creating a Scalable Process

Having an efficient lead development process is critical in order to maximize finding qualified individuals. By being able to better track the status of each individual, outreach coordinators can make sure that people don't "fall through the cracks." "We can track individuals so that if they don't qualify now, we can set up reminders to follow up with them six months later to see if their status has changed," said Pat. "Our enrollees include lower income, elderly, recent immigrants and mentally disabled people, and so anything that we can do to help us be on top of each situation is critical."

An additional benefit of a streamlined process is that better data is stored on each interaction. In the rare case that a grievance is filed, documentation on each interaction is important to understanding what was discussed and how to resolve any discrepancies. Pat said, "It also allows me as a manager to better train my staff to be more specific when explaining the intricacies of our plan."

### Reaching Out

MondayCall Solutions also helped with the setup and training on campaigns. Being able to run campaigns from salesforce.com has helped the Alliance stay in touch with the community and to scalably reach its target market more effectively. The Alliance can now track how its campaigns are doing and efficiently handle responses.

*"Our job is to help the people in our community who are in need. Salesforce is a powerful tool that helps us meet our challenges. MondayCall Solutions helped us organize our data, process and workflow so that we could take advantage of salesforce.com."*

- Pat Protopappas  
Sales Manager for Alliance CompleteCare

