

Harvard Pilgrim Health Care, Inc.  
Wellesley, MA  
www.harvardpilgrim.org

**Industry:**

Healthcare

**Annual Revenue:**

US\$2.5 billion

**Employees:**

1,400

**Oracle Products & Services:**

Oracle Customers Online  
Oracle Field Sales  
Oracle TeleSales  
Oracle Financials  
Oracle Customer Data Hub

**“We needed to integrate our sales and service systems to improve service and productivity. Oracle’s solutions enabled us to replace our disparate homegrown applications with an integrated solution—providing us with a complete view of our customers and increasing our marketing efficiency.”** – Jay Wells, Business Application Manager, Harvard Pilgrim Health Care, Inc.

**Harvard Pilgrim Health Care Integrates Customer Information to Improve Service and Sales Initiatives**

Harvard Pilgrim Health Care, Inc. is a full-service health benefits company serving members throughout Massachusetts, New Hampshire, Maine, and beyond. An independent, not-for-profit organization, Harvard Pilgrim offers a wide variety of health insurance options for companies, families, and individuals. The organization’s fully-insured or self-insured preferred provider organization (PPO), point-of-sale (POS), and health maintenance organization (HMO) plans are available with multiple variations tailored to the needs of its members and their employers. Harvard Pilgrim received accolades for member satisfaction and quality of care from *U.S. News & World Report*, and distinction for member satisfaction from J.D. Power and Associates.

**Challenges**

- Integrate sales and service systems to improve internal and external customer service
- Identify key healthcare insurance accounts for up-selling
- Implement a customer relationship management (CRM) system that would integrate with the existing enterprise resource planning system and streamline vendor management

**Solution**

- Implemented Oracle E-Business Suite applications for CRM to replace home-grown, disparate applications, and provide a complete, integrated view of the customer
- Provided sales, service, and accounting with a consistent and accurate view of customers, driving more informed and integrated support and sales initiatives
- Enabled the organization to enter CRM-related information only once and automatically synchronize it with the company’s health insurance claims system and the Oracle ERP system
- Reduced administrative costs by avoiding data re-entry
- Integrated service and financial data, enabling service personnel to access data quickly and speed problem resolution
- Enabled sales representatives to enter their own data, thereby increasing productivity and reducing administrative costs
- Minimized the time required to produce quotes by enabling underwriters to export directly into CRM modules
- Leveraged Oracle Customers Online as a data management tool to quickly address missing and incomplete data, which helped to drive greater marketing efficiency