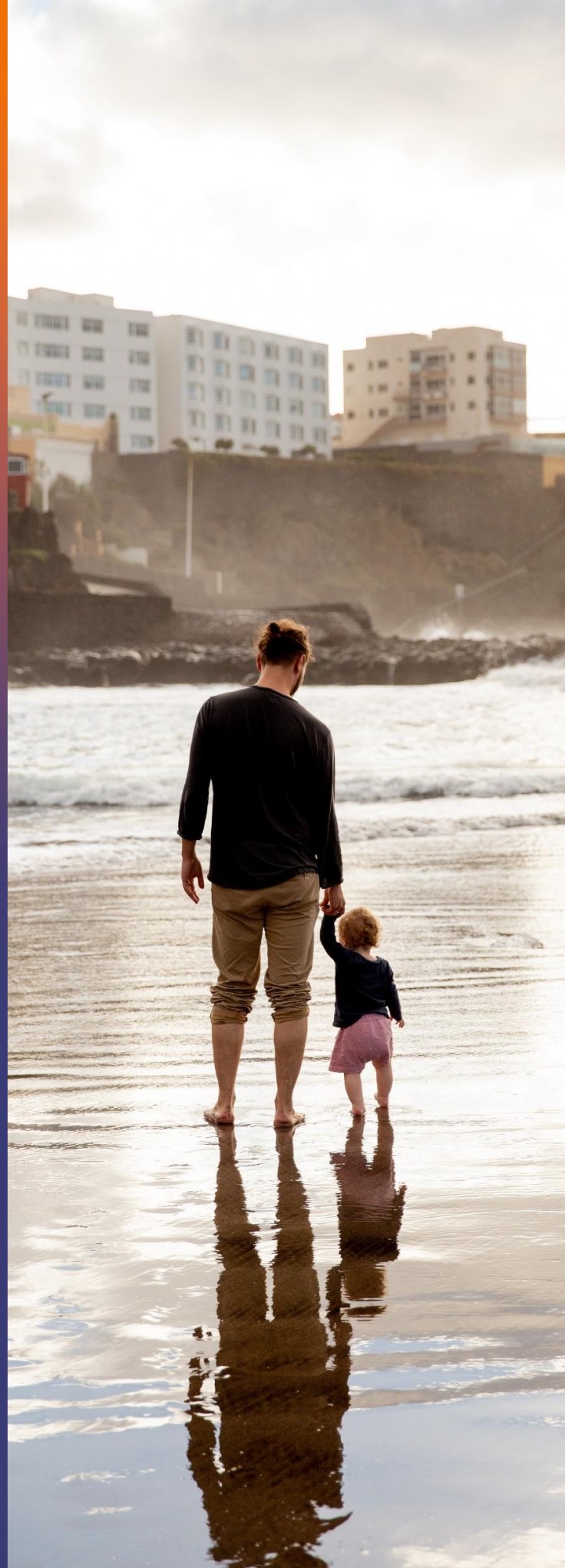


# Insurance Case Study



# SASKATCHEWAN BLUE CROSS

## DIGITAL TRANSFORMATION TO ACCELERATE BUSINESS GROWTH AND RETENTION

### ● ABOUT THE CUSTOMER.

SBC is a non-for-profit insurance provider based out of Saskatchewan, Canada. It is a member of the Canadian Association of Blue Cross Plans. It is also a member of Blue Cross Shield Association internationally SBC is one of the key players in the region of Saskatchewan and offers unique products and services to its customers. Saskatchewan Blue Cross is a local organization that puts people and community at the heart of every interaction. They've been serving the health insurance needs of Saskatchewan residents for over 75 years.

### ● CHALLENGE AND BUSINESS PAIN POINTS.

Over the years, SBC shown great success in the market because they have been in Saskatchewan since of start of its growth and development, and has contributed significantly to giving back to the community by involving themselves in hospitals, parks, schools, etc.

As a result, they were able to cultivate a sense of community within Saskatoon and its residents and elevated its brand loyalty to create customers for life.

Fast forward to the 2000s and the influx of new young immigrants and a younger population, and with that, the rise in digitalization and the need for information to be accessible on their smart devices, in a concise and personalized manner. A growing concern for SBC, since, for this generation of consumers, the sense of community is not enough to become a customer.

The need for targeted and meaningful communication, relevant brand messaging, good service and customer experience became paramount.

Hence, SBC, identifying the need and trying to stay ahead of the curve, embarked on a full digital transformation, which included updating their front end and back-end systems and processes. Amongst these was updating their marketing processes and toolsets.

The organization was using a combination of disintegrated systems to perform marketing initiatives and did not have a clear understanding of its customers and their needs. This issue was enhanced by the fact that they were dealing with an on-premise architecture. Moreover, employees were not properly trained on the existing systems, and this resulted in ineffective usage of the platforms and poor implementation of processes.

## RESULTS AND BUSINESS IMPACT

### 360° SINGLE CLIENT VIEW

for a complete understanding  
of customer interactions

# -40%

in marketing campaign  
implementation time

### MQL- SQL

increase conversion  
through real-time lead to  
customer insights  
all the way down the funnel

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# SASKATCHEWAN BLUE CROSS

## SOLUTION.

- **The right tool:** their digital transformation kicked off in 2019 and we chose the Creatio platform, as it best suited their current needs.
- **A clear vision:** the solution was implemented with a well-structured deployment plan which considered the strategic aspects of marketing and the adoption aspects of change management.
- **Tool configuration and adoption:** we ensured that the tool was properly configured to the best practices and the team was properly trained on the platform with a series of instructor-led training sessions with assignments.
- **Marketing Automation strategies:** as a part of the CRM implementation, Solutions Metrix assisted SBC in implementing marketing initiatives, focusing on objective-based key areas such as lead lifecycle development (lead acquisition to lead qualification)
- **Client Nurturing:** we automated key activities within the tool to nurture existing customers through timely, standardized, yet personalized communications
- **Integrated tools:** full integration with tools, including marketing tools such as website analytics and social listening, with their CRM enabled them to monitor their customers touchpoints and interests.
- **Understanding their customers:** we assisted SBC in understanding their current customer journey from a B2C perspective and offered recommendations for optimization across the journey.
- **Privacy Compliance:** subscription and opt-in management was configured and maintained in CRM to ensure that they can listen and adhere to their customers' demands and preferences.

## CONCLUSION.

Solutions Metrix applied its expertise and in close collaboration with the SBC team, ensured the success of this CRM and marketing automation implementation.

Through this project, SBC gained a new level of lead source data previously unavailable, allowing them to understand and act on the lead sources that were driving opportunities, growth, insurance applications and ultimately revenue.

Their agility of operations increased as the average time needed to plan and execute relevant marketing campaigns decreased.