

## Leading Health Plan Provider

**How a leading corporate health plan provider streamlines grantmaking process with SmartSimple's Premium Support Services.**

### At a Glance

The client, a large corporate enterprise, was looking for a centralized grants management system that could be used across multiple departments. Due to a negative past experience with another vendor, they also wanted customer service that would provide timely, effective support. By moving to SmartSimple Cloud, each team was given access to the system to manage their programs their way.

And by integrating SmartSimple's Premium Support Services offering, they had strong support behind them for when they needed help. The service gave them access to regular one-on-one discussions with a Dedicated Support Representative, as well as regular meetings with the Customer Experience team leaders. This level of engagement empowered them to make the most of their system by building a deeper understanding of how it worked.

**SmartSimple client since:** 2014

**Dollars granted:** Over \$13 million in 2015

**SmartSimple product/services:**

- [SmartSimple Cloud for Corporate Social Responsibility](#)
- [Premium Support](#)

### Key pain points:

- No reviewer portal
- Lack of post-implementation support
- Too much paper
- No tracking capabilities

### New system must-haves

- Online platform
- Solid support offering
- A one-stop shop for all funding opportunities
- Detailed tracking and reporting

"SmartSimple Cloud provides potential grantees one central location to find all available funds and sponsorships from all three departments."

**A Senior Community Funding Coordinator**



Leading Health Plan Provider is a SmartSimple Cloud user

**Request a demo and learn more about SmartSimple Cloud for Corporate Social Responsibility at [www.smartsimple.com](http://www.smartsimple.com)**

### About our Client

The client is one of the most recognized health and travel insurance brands in the United States. As one of the largest plan providers in the state of Minnesota, they've improved the lives of Minnesotans for more than 80 years. Not just a provider of health insurance plans and services, they are committed to making a healthy difference in peoples' lives.

### The Challenge

"Customer service is very important to us. Our previous vendor didn't provide the support we needed," says the Senior Community Funding Coordinator. "Response time is critical for us, so any delay in response made it difficult for us to continue our work. Not having a direct contact person to assist us with technical problems exacerbated the issue.

When we were able to arrange assistance, some solutions would be resolved in a day or two while others could take months. There were even some issues that never got resolved." To add more complexity to the organization's challenges, the client required a solution that would enable multiple teams to work in the same, centralized system.

### Moving to SmartSimple

The client moved to SmartSimple Cloud in the summer of 2014. They were impressed that they found a single solution that could fit all their unique needs. "Each area of the organization is different, so we needed a system that would enable us to show all the activities we were supporting collectively. SmartSimple Cloud provides potential grantees one

central location to find all available funds and sponsorship opportunities from every department.”

### The support challenge

When the SmartSimple Cloud implementation team completed their work and transitioned the system to the client, many were surprised at the breadth of capabilities that could be included in one, overarching system.

“We wanted even more training to ensure we understood everything we could do and be ready to take charge of our system.” It was during this time that SmartSimple was working on a pilot project for a new, extended **Premium Support Services** offering.”



### The Solution for Personalized Support

Premium Support Services was created in response to frequent requests from clients looking for an enhanced service option. “Our goal was to create a more individualized support offering for clients with complex configurations, those who don’t have a dedicated internal IT resource or those who regularly reach out to us for hands-on assistance,” says Eric Lauer, Director, Customer Experience at SmartSimple.

“The key benefit that differentiates Premium Support Services from Essential Support is a Dedicated Support Representative assigned to the client, specifically equipped with an in-depth understanding of their unique configuration. This means the client has their own personal support resource they can call for assistance who has the insight into their system that gives them the ability to provide answers and solutions quickly. Premium Support Services also offers regular meeting opportunities with a Customer Experience team leader to address any needs or concerns a client wishes to discuss, from additional training or conversations around strategy to additional changes to evolve the client’s system.”

**“Premium Support Services has definitely exceeded my expectations.”**

**A Senior Community Funding Coordinator**

“We became one of the early adopters of Premium Support Services,” continues the Senior Community Funding Coordinator, “We were very excited to be given the opportunity to try this new service before it was opened to other SmartSimple Cloud clients.”

### Providing Superior Customer Service

“Our Dedicated Support Representative is fantastic. What felt like a huge learning curve was made so much easier. I feel so much more comfortable using our system now. I can always reach out to someone with the expertise I need to guide me.”

“Premium Support Services has definitely exceeded my expectations. I’m the type of person who likes to talk through issues, so having someone on the phone with me while I’m working through a problem helps me to understand exactly what I need to do. Our Dedicated Support Representative is very patient while I take notes during our calls so I have the chance to learn as I go. Now I know I can solve most issues myself with confidence.”

### On Track to Success

“The additional training opportunities that come with Premium Support Services has vastly improved my skills and knowledge of our system’s capabilities. I was putting in about 100 hours a month performing my tasks. Now that I have a greater understanding of how to take advantage of the total system’s functionality, those same tasks are taking just 20 to 50 hours, freeing up days’ worth of time. We’re also seeing more members of our team actively using SmartSimple Cloud since everyone feels much more comfortable working with it.”

“Premium Support Services really made a difference, easing the transition from implementation to support. It’s an efficient process that helps our team accomplish more, faster. Everyone we’ve worked with to get Premium Support Services in place has been highly professional, extremely patient and very responsive. That’s pretty amazing, because of the unique needs of each department. No matter who calls our Dedicated Support Representative, they always get the help they need. We never worry because we always get the right solution.” ●