

## Case Study

**Green Beacon  
Solutions Expert  
Consultants  
Upgrade,  
Educate and  
Train HealthNow  
on Business-  
Critical CRM  
System”**



### **HealthNow New York Team is Empowered with Greater CRM Knowledge and System Performance Enhancements**

HealthNow New York Inc. is a premier and diversified health benefits and information company that provides innovative products, services, and technologies to improve the availability, quality, and cost of health care for more than 1 million members in New York State.

The member service-focused organization had built many of its core business processes on its existing CRM platform. But that platform was out-of-date and the operating system and databases supporting it were experiencing service degradation. The HealthNow team knew that if they did not upgrade their system soon, they might face detrimental downtime and loss of data access. HealthNow needed to move to the latest version of their CRM system and upgrade the existing operating system software and databases before the company's busy Open Enrollment period.

HealthNow turned to Green Beacon Solutions for help because of their proven history of expertise in CRM implementations – including Onyx and Microsoft Dynamics® CRM. HealthNow realized Green Beacon could provide the leadership, collaboration and skill set to ensure this migration went smoothly – without interruption to business processes – and was completed on-time.

“Green Beacon came to us with the proper knowledge of CRM solutions, and they were able to demonstrate expert knowledge and documentation within their proposal of how the project would run. They were spot-on,” said Linda Pierdomenico, Corporate Marketing Systems Manager at HealthNow New York.

#### **Testimonial**

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## At A Glance

- **Educated, Trained and Empowered Support Staff** -

HealthNow's team is well-positioned to support and further optimize their CRM system, as a result of Green Beacon's training.

- **Proven Project Management** -

Green Beacon ensured the project remained on-time and on-budget, meeting a critical Open Enrollment deadline.

- **Performance Improvements** -

The migration improved up-time and availability, as well as usability for employees.

## A Collaborative Approach Ensures a Successful Migration

When Green Beacon and HealthNow first began the project, it was clear HealthNow needed to immediately move off the old platform and outdated, unsupported hardware. One specific challenge HealthNow faced was that the internal Support team, which had not done the initial implementation, had limited knowledge about the technical components of their existing CRM system. HealthNow needed Green Beacon to perform the upgrade, but also to educate the internal team on the system, and act as project leaders in deploying the latest version of their CRM solution. With HealthNow's Open Enrollment period looming as a deadline, Green Beacon's proven project management processes were critical to the program's success.

HealthNow's CRM system is central to the company's business, supporting group information, client account management, sales processes, and other core business tasks. To ensure a seamless transition and upgrade to the new version of their CRM system it was important that the new version matched or improved upon the functionality of the older version. It was also important that business users were able to continue to perform tasks in the new version in the same way as they had been doing in the older version. While their processes and workflows remained the same, the company did see some specific benefits from the Green Beacon implementation, including:

- **Educated, Trained and Empowered Support Staff** - Green Beacon led HealthNow's CRM Support team through a number of training and design sessions, providing a strong base of knowledge in the CRM system and enabling them to maximize performance, workflow and processes in the future.

- **System Performance Improvements** - The old hardware and software that supported the existing CRM version had experienced occasional failures. The entire solution was upgraded to the latest software and hardware versions, which dramatically improved performance and stabilized the system.

- **Improved Usability** - While the system needed to match the old configuration and be familiar to users, Green Beacon was able to improve the interface and increase user efficiencies by reducing the number of clicks it took to access specific data or to complete a process.

- **Group Enrollment Workflows** - The Open Enrollment process is managed via the CRM system, and Member Services uses the system to identify and track clients through enrollment to completion. Green Beacon optimized and formalized the workflows to ensure efficient and effective processes.

- **Integration with Core Application Processing System** - By integrating the CRM system with the suite of business information systems, HealthNow benefits from automated processes that reduce errors and streamline the group's management operations.

- **Sales Reporting & Competitor Tracking** - Green Beacon incorporated sales management and reporting into the CRM system, providing HealthNow with better insight into the sales pipeline and deal specifics.

## Testimonial

“Green Beacon Solutions came to us with the knowledge, best practices, and phenomenal organization skills that were required to ensure the success of our project,” said Pierdomenico.

## Exceptional Project Management and Collaboration

Green Beacon Solutions’ proven project delivery methodology ensured consistency and excellence throughout the project implementation, even as multiple groups worked on different aspects of the project simultaneously. Green Beacon’s “Lightship Methodology” consists of a defined delivery process and tools that enabled the project team to effectively forecast and manage resources and time with a high degree of accuracy. This allowed the project to be completed on-time and on-budget with demonstrated end-user satisfaction and an immediate ROI.

- **Proven Project Management** – Green Beacon’s proven skills ensured the project remained on-time, and that the internal and Green Beacon teams collaboratively worked to scope and budget.
- **Deep Technical Expertise** – Green Beacon’s team of Consultants, Managers and Executives have decades of experience working with the industry’s leading CRM systems. This team’s expertise provided HealthNow with great peace of mind, as their team ramped up on the solution.
- **Commitment to the Client** – Green Beacon’s consulting team worked closely with the client as true partners, helping them meet their critical deadline with an optimized CRM solution.

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**Green Beacon Solutions implements integrated financial, supply chain, sales automation, and marketing business solutions built on Microsoft technologies within the distribution, professional services, banking, and manufacturing industries.**

**Since 2001, we have delivered unique software, consulting, and managed service solutions, built upon our project LightShip Methodology and integrating our CompassPoint Solution software accelerators to help clients quickly and cost-effectively meet their goals.**

**Our clients demonstrate their satisfaction through repeat engagements and service recommendations. By choosing Green Beacon Solutions, companies choose a trusted advisor with recognized market experience who guarantees project success by meeting their business objectives, project budget, and timelines.**

### Company:

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- Established in 2001
- Headquartered in Boston, Massachusetts
- Offices in New York, Philadelphia, and Houston
- Specializing in the design, development, and implementation of Microsoft Dynamics Business Solutions and after-market support services for many leading ERP and CRM software packages.
- Microsoft Gold-Certified Partner
- Serving over 100 Microsoft Dynamics customers globally