

Customer Success Story

MEDEX Global Group

MEDEX needed a highly-scalable and flexible CRM system with powerful integration capabilities to enable sharing of real-time information across the organization. They found their solution in Epicor Clientele CRM.NET

At a Glance

Company	MEDEX Global Group
Industry	Emergency travel assistance and medical insurance
Headquarters	Townson, MD
Employees	70
Logistics	Over 43,000 medical assistance resources
Business Challenge	Limited functionality and flexibility of homegrown software system hindered productivity enterprise-wide
Solution	Clientele CRM.NET
Business Benefits	<ul style="list-style-type: none"> ● Ability to share detailed contract and service information enables efficient, effective and fast support ● Improved flexibility in adapting to growth and changing business processes through Web services architecture ● Ability to easily create HIPAA (Health Insurance Portability and Accountability Act) compliant reporting ● Access to comprehensive data enables better business analysis ● Reduced reliance on paper and time savings in sales cycle

Each year, millions of people travel outside of their home country without adequate travel protection. MEDEX Global Group helps them find the care they need. For MEDEX, a leader in the travel assistance and international medical insurance marketplace, providing its customers with accurate real-time information is essential. In an effort to streamline internal processes and provide better service to its customers, MEDEX sought to implement a flexible CRM solution that could be adapted to meet its specific business needs.

The company had been using a homegrown software system that was limited in functionality and flexibility and hindered productivity for users company-wide. Joyce McNemar, chief technology officer for MEDEX, formed a multi-departmental task force that, after eight months of detailed evaluation, chose Epicor's Clientele CRM.NET software over two other vendors. "Clientele offers MEDEX a very competitively-priced system that can be customized to our unique business requirements," said McNemar.

Throughout the implementation, McNemar lead the multi-department planning team through a thorough review of business processes to define the data elements and structure that would best support the business. "The Epicor team used that information to provide certain customizations that make the system feel like it was designed for MEDEX," said Rob Currie, vice president of account services.

Providing World-Class Support from Across the Globe

Clientele CRM.NET is used enterprise-wide at MEDEX – from its back office order processing and fulfillment operations, to its front line assistance center and business acquisition team. The MEDEX assistance center includes the 24-hour multilingual assistance center responsible for the daily management of more than 25,000 assistance cases annually around the globe. These assistance operations rely on data and instructions managed by MEDEX's back office team, and the assistance case information is regularly referenced in client account management.

The ability to share case, contract and coverage information across the organization is critical. "Clientele enables us to quickly access the information we need to assist our travelers - whether it be a medical emergency requiring a physician specialist and air evacuation from Malaysia, or a client asking for an update on a case," explained Colleen LoPresto, chief operating officer for MEDEX and the company's HIPAA (Health Insurance Portability and Accountability Act) compliance officer. "Furthermore, the ability to easily create HIPAA compliant reporting is an important customization for us, as we deal with sensitive personal health information daily."

Leveraging Web Services to Improve Business Processes

In addition to managing contract information, the order processing and fulfillment function of MEDEX must manage information about emergency care providers, clients and programs. Extensive data on provider credentials and historical experience is held in a proprietary database that includes more than 43,000 international assistance providers and geographic intelligence. MEDEX leveraged the flexibility of Clientele CRM.NET's Web services and Microsoft .NET architecture to put this critical data at the hands of its assistance center representatives.

"The flexibility of the Microsoft .NET Framework enabled us to integrate this informational database with Clientele so

up-to-date information is always available to our assistance center," said McNemar. For example, if a client is in a third-world county and has a heart attack, MEDEX must make sure there is an appropriate level of care. "With the integration of our proprietary solutions to Clientele, we can recall specific information about a care facility and provide the caller with assistance, based on the languages spoken there and diagnostic or treatment abilities and limitations."

Delivering Quality Enterprise-Wide

Since implementing Clientele CRM.NET, MEDEX is has seen improvements in its day-to-day operations through the flexibility of the solution and the ability to share information across the enterprise. "A lot of our service agreement and care facility information was not available in our previous system," said McNemar. "With the Epicor solution, we are able to put external documents like contracts right in the system where it is easily and quickly accessible."

MEDEX has both retail and wholesale customers and must manage complex contracts that include precise service specifications. "Our contracts might specify a certain client contact for coverage verifications on weekdays from 9-to-5, but after hours it may be someone else," said McNemar. "With Clientele we can designate roles and relationships for each of our contacts so our associates never have to question who to send these requests to."

In addition to streamlining every day process, Clientele CRM.NET serves as resource for business planning and supports company growth. "Using Clientele we are able to capture critical metrics, such as client utilization, which helps us in our strategic planning," said McNemar. "We can also respond quickly to new business opportunities. The rapid development capabilities enabled through the .NET architecture enable us to get new partners set up in our system quickly so we can start doing business."

The business acquisition area of MEDEX utilizes Clientele for lead and pipeline management. "The ability to easily transition prospects to clients will reduce our reliance on paper and will decrease the time spent on the client implementation process," said Linda McGee, vice president of sales for MEDEX.

McNemar attributes the success to-date to Epicor and the internal MEDEX project team. Today, she is looking forward to additional functionality and customizations beyond the current project scope and hopes to explore Clientele integration with MEDEX's Web initiatives.