



Customer story

How Persistent supported Simplyhealth in accelerating digital transformation with Salesforce Customer 360

Persistent partnered extremely well with Simplyhealth, providing more than just excellent Salesforce skills, but really understanding the critical part Salesforce played in our wider digital transformation program. The combination of technical skills and business experience they bring was a key factor in the success of One Salesforce.



Dave Exall
Chief Digital and Technology Officer
at Simplyhealth

Key figures:

1872: Simplyhealth was established

More than **1,300** employees

More than **3 million** UK customers

308 users created in the One Salesforce org

8.3 Million Salesforce records migrated from the old org to the One Salesforce org

2450 project tasks created to build One Salesforce

Over **40** project team members across 19 departments involved with the Persistent Team

The client

Simplyhealth is the UK's leading provider of health and dental plans for more than 3 million people: individuals, couples and families, and corporate health plans.

Based in Andover, Hampshire, Simplyhealth's mission is to make it as easy as possible for people to access health products, services, and support whenever they need it.

During the pandemic, the healthcare solutions company intensified its efforts to make consumer access to their services even simpler: they made resources available online free of charge, they launched SimplyMe, a health tracker app, and more recently, they released SimplyPlan, a new app that simplified the claims process for consumers and SimplyConsult which allows their customers to quickly and easily access a 24/7 video GP service.

In March 2021 Simplyhealth won the 'Health Insurance Innovation Award' given by the personal finance comparison website finder.com.

Find out more: <https://www.simplyhealth.co.uk>

Key facts



Duration

6

months



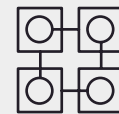
Integrations

Simplyhealth's back-office systems



Products

Salesforce Marketing Cloud



Migration

8.3 Million Salesforce records migrated



www.simplyhealth.co.uk

I definitely recommend working with Persistent. They took a lot of pressure off of us by doing great analytic work. They talked to our system users, gathered their requirements and trained them. It was really reassuring for us, considering our tight timeline.

Rebecca Hall
Head of Salesforce, Simplyhealth

The challenge

Simplyhealth was certain that, in order to deliver a better service to their customers, the first step was to empower employees and make sure they could access the information they needed, anytime and anywhere.

At the start of the partnership with Persistent, Simplyhealth had three business areas highlighted for improvement. The dental business, which was supported by a legacy CRM, the Cash Plan business, and the vet business (which was eventually sold during the partnership). The Cash Plan and Vets businesses were held in separate Salesforce Organisations and also in different geographical locations, which didn't facilitate collaboration and efficiency.

As a consequence, the multiple customer service teams were lacking cohesive data, while facing significant duplication in their activity. Moreover, the main solution used by Simplyhealth was heavily customised, which made it unable to take advantage of new Salesforce features.

In short, thanks to its 3 million customers, Simplyhealth had a lot of useful data to improve the customer experience but the lack of cohesion of this data made it impossible to exploit its full potential, and this is where Persistent comes in.

The solution

Simplyhealth embarked on a digital transformation that would eventually improve the quality of their customers' experience and the experience of all their teams.

In order to do this, they commissioned Persistent to merge three solutions into one, superb Salesforce solution. They also entrusted Persistent to implement Marketing Cloud, which wasn't part of their previous marketing stack.

Thanks to the synergy between Persistent and Simplyhealth's technical team, who worked using the agile methodology, the ambitious timeline was met. Persistent completed the 'One Salesforce' project (as Simplyhealth named it) in four key stages:

- Implementing initial "One Salesforce" and baseline processes by merging Dental and Corporate Health Plan businesses onto to-be Salesforce
- Connecting Salesforce Marketing Cloud and building personalised customer journeys to drive customer engagement
- Migrating Consumer Health Plan business to "One Salesforce", leveraging standardised processes across all business lines including Corporate, Consumer and Dental
- Integrating with back-office systems to ensure the users had a full 360 degree of their customers



**Persistent were very proactive, responsive and collaborative.
Their work was really high-quality. I felt like we were in very safe hands.**

Rosie Wilson
IT Delivery Manager, Simplyhealth

The result

One Salesforce has been a real key enabler and accelerator for Simplyhealth. Their new digital strategy couldn't have been executed without the One Salesforce platform. The healthcare solutions company is now ready to leverage this new, centralised platform that will enable them to get a 360 view of their customers, in order to better market to them and foster long-lasting relationships.

Before the merge, Simplyhealth had multiple invaluable customer data spread across separate Salesforce and legacy solutions. Today, advisors are empowered by the fact that, if an existing customer calls to benefit from another service, not only will they have the ability to see their customer account, but they will also have direct access to all their previous interactions with Simplyhealth.

The marketing team can now offer existing customers additional products from Simplyhealth's catalogue, tailored to their interests.

In addition, Marketing Cloud enables Simplyhealth to deliver relevant, personalised and automated marketing journeys to their target audiences across the right channels and devices.

We are grateful for our relationship with Persistent as one of our trusted partners for the past 18 years. As a Platinum partner, Persistent's global Salesforce practice works side by side with us as we support our customer's success.



Leon Mangan
Salesforce SVP Alliances et Channels
EMEA & LATAM

Skills & Certifications

Management of complex multi-cloud projects. More than 500 certifications in EMEA (Sep. 2021), including Field Service, CPQ, Marketing Cloud, Pardot, B2B Commerce, Heroku and Mulesoft.

About Persistent

With 13,000+ employees around the world, Persistent Systems is a global solutions leader delivering digital business acceleration, enterprise modernization, and next-generation product engineering.

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