

Digitizing quote requests to accelerate sales cycles

A Pennsylvania-based health insurer relied on static Excel forms for Large Group quote requests, which resulted in incomplete submissions, internal confusion, and delays in benefit builds.

We implemented a dynamic, intuitive form within Salesforce using Health Cloud and OmniStudio. The new form includes conditional logic, data validation, version control, and plan selection tied directly to prospects or customers. This reduced manual errors, eliminated back-and-forth between Sales and Support, and accelerated the quoting process.

We empowered our client's team to manage the solution independently. In fact, the client team went on to build enhancements and data integrations after go live.

