

A health plan is leveraging Salesforce Health Cloud to expand and scale services to its members while optimizing access to benefits.

Blue Shield of California Advances Access to Care Through Digital Innovations

February 2024

Written by: Jennifer Eaton, Research Director, Value Based Healthcare IT Transformation Strategies

Introduction

Blue Shield of California focuses on innovation and digital transformation to achieve its goal of helping members lead healthier lives. The company has been using the Salesforce platform since 2007 and deployed the traditional CRM tools in 2009. The partnership with Salesforce expanded when Blue Shield envisioned a unified member experience that not only promotes member engagement but also advances holistic and hyper-personalized care at scale.

This was the right thing to do for its members, according to Bill Giard, vice president of Enterprise Architecture and Health Innovation at Blue Shield of California. Giard noted that the company was gearing up for "an influx of medically complex, dual eligible members in January of 2023" and thus recognized the need for a technology solution that could meet the needs of this highly regulated environment while driving the goal of cost-effective, high-quality care. After an extensive vendor analysis, Blue Shield implemented Salesforce Health Cloud, a healthcare- and life sciences-centric platform, in 2022. Regarding the prioritization of innovation strategies, Giard stated, "It all starts with the health outcomes we want to achieve for our members, including lowering their cost of healthcare holistically and creating experiences that allow for the right care when and where they need it."

SOLUTION SNAPSHOT

ORGANIZATION:

Blue Shield of California is a nonprofit health plan founded in 1939 and headquartered in Oakland, California, serving 4.8 million members.

ORGANIZATIONAL CHALLENGES:

- » Blue Shield needed a platform solution that supported a medically complex, growing member population through a unified experience, which included scalable care management services.
- » Benefits enrollment was a manual, paper-based process for brokers and employers.

SOLUTION:

Salesforce Health Cloud

PROJECT DURATION:

The company launched the multiphase project, which is ongoing, in 2020.

BENEFITS:

- » Unified view of members' health information, supporting holistic care
- » Streamlined workflows and reduced benefits processing time, accelerating members' timely access to care

Implementation

Blue Shield recognized that care management significantly impacted member experience, care collaboration, and positive health outcomes and decided to develop an innovative approach to understanding and providing advanced care services for certain members while ensuring its technology partners could comply with all regulatory requirements. With a tight nine-month timeline and the need to drive data synthesis from 13 disparate systems as a starting point, the Blue Cross and Salesforce teams focused on mission-critical capabilities and strong team engagement and collaboration from the start. The outcome was Care Connect, a clinical care management system built on Salesforce Health Cloud. "Care Connect allows Blue Shield's clinical care teams to better understand our members and provide holistic care support through a new, integrated source of truth," said Tracy Alvarez, vice president of Medical Care Solutions at Blue Shield of California.

For Kari Hayes, director of the Salesforce Center of Excellence at Blue Shield of California, the 2023 launch of streamlined digital benefits administration management changes was part of a multiyear, multiphase project that began in 2020 with the roll out of digital quote and enrollment services for new sales, targeting its small business employers. Hayes stated, "Our goals [with Salesforce] really became more strategic to execute on our platform vision for Blue Shield by accelerating transformation, becoming digital first, and ultimately reimagining healthcare." In 2023, the company moved closer to that goal by adding digital group and member maintenance changes, which further reduced manual, paper-based workflows and lag time that could impact members' ability to access coverage benefits in a timely manner. By reducing benefits management processing for commercial accounts to minutes, customer service representatives can now confirm updates and access to care eligibility while the broker is still on the phone, creating a positive and engaging experience. With automated underwriting eliminating the manual "touch" of 50% of applications and "guided" workflows increasing accuracy, this newly implemented digital experience had a high degree of adoption and received positive feedback from the broker community. With enterprise strategies in mind, Blue Shield created synergies that promote value for brokers, employers, and members, while an optimized, flexible platform provides maximum internal value as well.

Next Steps

Since the initial launch of these Salesforce-powered digital solutions, Blue Shield has made continuous updates to and advancements on its platform strategy. Specifically, enrollment management services will continue expanding their digital-first approach to commercial markets. They will also lean into customer relationships for continuous feedback while optimizing the platform's highly configurable nature. Alvarez said that since Care Connect went live on January 1, 2023, "we haven't stopped." Supporting the concept that innovation never ceases, she shared plans to expand and scale use cases associated with the benefits of a unified experience, ensuring that all key stakeholders have access to accurate and comprehensive information — all in the pursuit of providing the right care for each member at the right time.

Challenges

When considering a transition from a point solution to an innovative platform solution, attention to change management is vital. While Blue Shield focused on initial training, additional project "sprints" revealed the need for training earlier in the timeline to gather, analyze, and fully vet feedback before additional updates. From a technical perspective, ensuring visibility into the release pipeline and embedding the correct automated release capabilities are critical. Blue Shield also paid particular attention to the variety of end users in these projects since some were direct employees and others were

partners. Developing strong internal expertise and resources (such as superusers, short instructional videos, and FAQs) allowed customized training and change management strategies that fit the needs of large, diverse end-user groups.

Benefits

For each phase of the ongoing initiatives, Blue Shield identified key performance indicators (KPIs) to measure success. The Salesforce Health Cloud–enabled platform provides benefits in the following categories:

- » **Innovative digital transformation:** Salesforce Health Cloud allows Blue Shield to create a foundation for current and future innovation as the company continuously improves processes and provides best-in-class digital services for members and partners.
- » **Member engagement and satisfaction:** By eliminating data silos and creating a single source of truth for member/patient data, payers and providers get a holistic view that promotes hyper-personalized care and engagement strategies. By "understanding our members better," Blue Shield stated that it can better meet the evolving needs of its growing member population and ensure connection to all in-network benefits.
- » **Member enrollment services:** With new automation capabilities and the streamlining of enrollment life cycles into self-service digital experiences, digital enrollment increased by 75% and manually reviewed group enrollment decreased by 50%, improving the agility of member services and adding value for employers and brokers, according to Blue Shield. A consistent enrollment experience for employers and brokers has reduced benefits administration processing time from 24 hours to just 5 minutes, allowing faster and more accurate information sharing, streamlined communications, and fewer administrative friction points that could delay members' access to care.

"Our goal is to improve how we engage with and care for our members across their interactions with Blue Shield of California, and we now have a platform approach that allows us to create unified member experiences." — Bill Giard, vice president, Enterprise Architecture and Health Innovation, Blue Shield of California

Blue Shield stated that these initiatives are the first of many to be built in partnership with Salesforce. This platform approach has created a foundation for information sharing across clinical teams, patients/members, community providers, community resource centers, and member services departments. By connecting people through data, the company has taken giant leaps toward its value-based, health-driven goals through individualized and equitable care for all. In detail:

- » **Care management services:** Building on Blue Shield's ultimate goal of supporting high-quality healthcare and reducing the cost of care, unifying data across multiple sources (including clinical, lab, pharmacy, behavioral health, care gap, and other key sources of member health data) provides care teams with the knowledge they need to identify each patient's unique health and social vulnerabilities, customize care plans to address those needs, close care gaps, and expedite interventions. The results include both short- and long-term high-quality health outcomes and lower costs. Blue Shield stated that the number of members served through Care Connect has doubled and expects that number to grow and expand to include additional population health management tools. "This game-

changing technology has helped us reimagine how to provide personalized and simplified healthcare experiences for our members," Giard stated.

Methodology

The initiative and company information contained in this document were obtained from multiple sources, including information supplied by Salesforce, questions posed by IDC directly to the employees of Blue Shield of California, and Blue Shield of California's corporate documents.

About the Analyst



Jennifer Eaton, Research Director, Value Based Healthcare IT Transformation Strategies

Jennifer Eaton is research director for Value Based Healthcare IT Transformation Strategies. Her core research coverage includes the use of cognitive/AI technologies to advance digital transformation in healthcare, particularly value-based health, the intelligent healthcare enterprise, and the industry ecosystem.

MESSAGE FROM THE SPONSOR

Salesforce Health Cloud, built on the world's #1 CRM, connects data, and teams, automates processes, and personalizes engagement on a single, intelligent platform. This platform serves as the backbone for care innovation strategies by harnessing the power of data, streamlining processes, fostering collaboration and engagement, and delivering value to end users.

To learn more about Salesforce Health Cloud, visit: <https://www.salesforce.com/products/health-cloud/overview/>.

IDC Custom Solutions

IDC Research, Inc.
140 Kendrick Street
Building B
Needham, MA 02494, USA
T 508.872.8200
F 508.935.4015
Twitter @IDC
idc-insights-community.com
www.idc.com

This publication was produced by IDC Custom Solutions. The opinion, analysis, and research results presented herein are drawn from more detailed research and analysis independently conducted and published by IDC, unless specific vendor sponsorship is noted. IDC Custom Solutions makes IDC content available in a wide range of formats for distribution by various companies. A license to distribute IDC content does not imply endorsement of or opinion about the licensee.

External Publication of IDC Information and Data — Any IDC information that is to be used in advertising, press releases, or promotional materials requires prior written approval from the appropriate IDC Vice President or Country Manager. A draft of the proposed document should accompany any such request. IDC reserves the right to deny approval of external usage for any reason.

Copyright 2024 IDC. Reproduction without written permission is completely forbidden.