Health Consulting Firm

Developing a CRM to efficiently manage clients, contacts, carriers, coverages, vendors and competitors.

Industry:

Health Benefits Consulting

Client Size:

Mid-market, multi-state employer consulting

Platform:

Microsoft Dynamics 365, Dataverse, Power Platform, Azure AD

Engagement:

Discovery · Build · Train · Support

Executive Summary

We worked with a health consulting firm that was struggling with disorganized spreadsheets and disparate tools. They needed a centralized system for their critical client, contact, coverage, and vendor data. We developed a custom Microsoft Dynamics 365 solution that now tracks everything from clients and specific coverage details by carrier (like PBMs, TPAs, and Networks), pharmacies, and even competitor activity. This system effectively manages carrier and coverage tracking, simplifies vendor relationships, and clarifies their lead and opportunity pipeline.

Now, their consultants and account teams access all necessary information easily. They get a complete view of each client. All coverages, active plans, renewal dates, and every vendor interaction. Dashboards highlight at-risk renewals, identify potential cross-sell opportunities, and show competitor activity. This transition shifted them from reactive data searching to proactively using insights, helping them serve clients better and drive business growth.

The Challenges We Faced

When we first started working with this health consulting firm, it was clear they were dealing with some tough issues. These problems weren't just an inconvenience; they were holding back the firm's growth and making it harder to provide excellent client service. We noticed data spread everywhere, too many tasks done by hand, and inconsistent ways of doing things. This often meant they missed important details at every step, from bringing in new business to handling renewals and finding opportunities for additional services.

1

Client Coverage Data Was Scattered

Information about medical, dental, vision, Medicare, disability, and life insurance coverage lived in countless spreadsheets and email threads. When renewal season came around, consultants had to scramble to gather all this data. This often caused delays and, sometimes, left clients feeling unsure. There wasn't a single, dependable record of active coverage, which made strategic decisions unnecessarily complicated and risky.

2

No Clear Picture of Clients, Vendors, or Carriers

It was incredibly hard to tell which PBMs, TPAs, or network vendors were serving which clients. This made it nearly impossible to fairly compare rates, terms, or performance across their client base. Vendor relationships were tracked haphazardly, and past performance data wasn't consistently recorded. The result? Weaker negotiations and less effective strategic advice for their clients.

3

Promising Leads Often Slipped Away

New leads, whether from marketing efforts or referrals, weren't consistently managed or followed up on. Without organized systems and clear responsibilities, good opportunities frequently disappeared. Response times varied widely, depending on who was available and how busy they were, which isn't ideal when you're trying to grow a business.

4

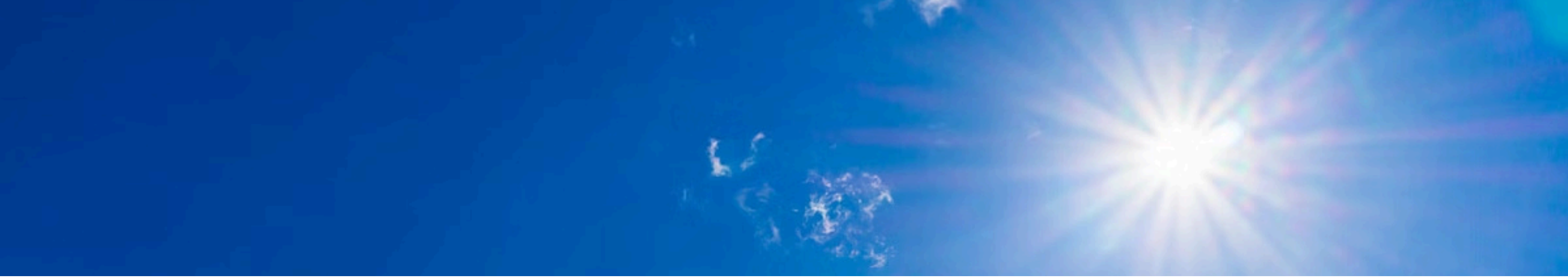
Competitor Insights Relied on Hearsay

Information about rival carriers and competing consulting firms was buried in individual email folders and personal notes. The firm wasn't systematically learning from their successes or failures, meaning they couldn't identify patterns or refine their approach to winning new business. Competitive intelligence was more about

5

Renewal Forecasting Was Unpredictable

Renewal dates, whether clients were ASO or fully insured, and various fee arrangements weren't brought together into one clear view. This left leadership without good insight into upcoming renewal workloads. Resource allocation became purely reactive, leading to periodic busy periods that put stress on their teams and, more



What We Set Out to Do

When we started this project, our main goal was to pull all the firm's information into one unified system. It wasn't just about new software; it was about truly transforming how they managed clients, understood the market, and grew the business. Every step, from our first meeting to the final rollout, was guided by these core aims.

1

A Single, Central Hub for Everything

We set out to build one central place for all essential information: clients, contacts, coverage details, carriers, vendors, pharmacies, and new opportunities. This meant saying goodbye to scattered data. Now, everyone works from the same accurate, up-to-date information, making client conversations and internal planning much more straightforward.

2

Clear Visibility into Coverage and Carriers

We created an intuitive visual system that quickly shows active coverage, terms, renewal dates, and the current carriers for every client. Our consultants can now prepare for renewals, identify gaps, and find new opportunities with a quick glance, rather than searching through stacks of files.

3

Structured Lead and Opportunity Tracking

We brought order to lead management. By establishing clear Service Level Agreements (SLAs), required fields, and approval steps, we ensured sales forecasts were reliable. Every lead now receives consistent follow-up, and everyone has clear ownership and milestones, making business development a predictable process.

4

Better Competitive Understanding

We built a system to consistently log why we won or lost a deal, and to pinpoint where we could realistically win business from competitors. This helps us see trends, refine our strategies, and strengthen our competitive position across all our markets and client types.

5

Leadership Gaining Full Insight

For the leadership team, we implemented D365 dashboards. They now receive real-time updates on renewals, the health of the pipeline, and opportunities for cross-selling. This provides them with the solid data needed to make informed decisions on resource allocation and growth strategy.

6

Improved Relationship Management and Activity Tracking

We developed a comprehensive system to record every client interaction calls, meetings, emails, and tasks. With automated data capture from Outlook and mobile access for consultants, we now have a complete interaction history. This allows for more proactive client management and enhances team accountability.

Streamlining Your Operations

We've built a system that manages the critical day-to-day work, helping your operations run smoothly. This means your team spends less time on repetitive manual tasks, important details don't get overlooked, and there's a consistent process for keeping clients satisfied and supporting growth.

Capturing Every Lead

When a new lead comes in, the system automatically creates a set of tasks. If there's no response within, say, 24 hours, a manager receives an alert. This way, we always know who is responsible for a lead and how long it's been active, ensuring we don't miss potential opportunities.

Effortless Renewals

Our system helps us manage renewals effectively. It sends automated reminders 120, 90, and 60 days before a renewal, triggering tasks, checklists, and proposal deadlines. We also have a clear overview of all upcoming renewals, which makes planning our team's time and resources much simpler.

Structured Change Approvals

Any changes to carriers or vendors now follow a clear, multi-stage approval process. This ensures full visibility into who approved what and when, providing a complete audit trail. This is crucial for maintaining compliance and our high service standards.

How Our Processes Improve Results

These automated workflows have significantly changed how our consultants work, helping them be more proactive. Instead of needing to recall renewal dates or manually track lead follow-ups, our team now gets consistent prompts that guide them through established procedures. Leaders have more confidence in our forecasts because all necessary data is collected at key points, rather than being pieced together from memory much later.

The system doesn't just track activities—it organizes them. Our producers know exactly what steps to take to move an opportunity forward. Account managers receive early notifications about renewals that require attention. Operations leaders can identify potential bottlenecks before they affect client service. This operational consistency helps us apply our expertise more broadly across the team and reduces our reliance on individual efforts.

Security & Governance: Keeping Your Information Safe

When you're handling sensitive client and competitive information, security isn't just an extra feature—it's essential. We built this system with strong controls from the start: clear role-based access, transparent audit trails, and reliable data quality measures. This gives you a platform you can depend on, knowing it's compliant and trustworthy, so you can focus on your work without worrying about your data.

Controlling Access with Role-Based Permissions

We've set up specific security profiles for everyone on your team—Producers, Consultants, Account Managers, and Leadership. Each role only has access to the data they need to see, edit, or delete. It's like a digital reflection of your team structure; consultants, for example, can only access the clients and opportunities they manage. This method keeps your sensitive competitive and client data secure, while still allowing for effective collaboration.

Clear Audit Trails & Approvals

Any major action, like changing coverage or moving an opportunity forward, now requires explicit approval from the right people. Every interaction with a client, every change to coverage, every stage of an opportunity is recorded in a permanent timeline. This gives you a complete, verifiable audit trail that meets your internal governance needs and prepares you for any regulatory inquiries.

Ensuring Reliable Data

Our system is designed to handle data intelligently. It actively finds and prevents duplicate records, even if they come from different sources. We make sure crucial information is always captured by requiring specific fields at each stage before an opportunity can progress. And to keep things moving, automated checks will flag any opportunities that seem stuck without a clear "next step," prompting your team to act. This focus on data quality means you'll have accurate forecasts and well-managed operations.

No PHI Stored Here

We deliberately built the CRM to avoid storing Protected Health Information (PHI). Our aim is to track plan and coverage details—like carriers, vendors, and benefit structures—without ever collecting member-specific data. This conscious decision keeps the platform outside of HIPAA regulations, all while fully supporting your consulting processes. It’s a thoughtful design that protects your business.

Security is Built-In, Not Added On: We didn't just tack on security and compliance; we integrated it into every aspect of this solution—from the data structure to the automated workflows. It's truly a core part of everything we've created. This approach significantly reduces your risk and makes future audits or certifications a much simpler process.

Ensuring Team Embraces the New System

The most advanced technology won't help your business if your team isn't comfortable using it. That's why we invested heavily in a thoughtful adoption strategy – from tailored training sessions to in-system guidance and ongoing support. Our priority was to make sure your consulting firm genuinely benefited from its Dynamics 365 implementation from day one.

Training Tailored to Each Role

We avoided generic system walkthroughs. Instead, we developed training specifically for each role – producers, consultants, and client services teams. Every session focused on the workflows and features they would actually use. Producers learned how to manage leads and move opportunities forward. Consultants practiced with coverage matrices and renewal processes. And client services teams got hands-on experience with contact management and tracking client interactions. The goal was simple: make it immediately practical and relevant to their daily work.

Before Launch

We provided specific training for each role.

Key users helped us test the system, giving valuable feedback.

Their input directly shaped final adjustments.

Launch Day

Our team was available on-site for immediate assistance.

We resolved any issues as they came up.

Everyone received quick reference guides to help navigate the new system.

Intensive Post-Launch Support

We checked in daily with users for the first two weeks.

We actively managed and prioritized requests for enhancements.

Processes were continuously refined as the team adjusted.

Ongoing Partnership

We continue to hold regular office hours for questions.

Quarterly refresher training helps everyone stay proficient.

New hires receive their own personalized onboarding.

Tangible Outcomes, Clear Value

For us, implementing Dynamics 365 wasn't just about getting new software. It was about creating practical improvements in how the business operates. While we're still compiling some client-specific metrics, our initial findings already confirm its benefits and highlight a significant positive shift.

90%+

Quicker Lead Response

We saw this improvement within the first 30 days post-launch, largely due to automated routing and clear steps for following up.

150%

Estimated First-Year Return

The final figure here will depend on how effectively the client adopts cross-selling and refines their renewal processes.

6

Months to Recover Costs

With streamlined service level agreements and a proactive approach to renewals, we're already experiencing fewer last-minute issues.

Prompt Lead Engagement

We've established same-day contact as the norm for new leads, thanks to automated workflows and built-in tracking. Leads from marketing, which sometimes went unaddressed for days, are now routed instantly, and follow-up tasks are created immediately. If there's a delay, managers receive an alert, encouraging everyone to maintain high service standards. This responsiveness leads to better conversion rates and strengthens the firm's reputation.

Streamlined Renewals

Teams now have a complete overview of all upcoming renewals, which eliminates stressful, last-minute scrambles and speeds up proposal generation. Account teams automatically receive reminders 120, 90, and 60 days before a renewal, along with checklists to guide their preparation. Leadership can easily monitor renewal volumes across different consultants and periods, helping them distribute workloads effectively. As a result, our clients receive more proactive service and work with consultants who are better prepared.

Increased Cross-Selling

Our new dashboards reveal opportunities for additional services that we previously overlooked. For example, if a client has medical and dental insurance but lacks vision, life, or disability, the system highlights these gaps for account teams to discuss. This structured approach to identifying cross-sell opportunities has increased the sale of extra services and helped us capture a larger portion of each client's spending.

Dependable Projections

By standardizing how we track opportunities and requiring specific information at each stage, we've significantly improved the accuracy of our forecasts and given leadership greater confidence in our pipeline predictions. Instead of simply estimating deal probabilities, producers now need to record specific details—such as incumbent carrier decisions, renewal dates, stakeholder alignment, and proposal timelines. This enables leadership to accurately predict revenue, allocate resources wisely, and make informed growth investments based on a clear understanding of our sales pipeline.

Behind the Scenes: Our Tech Stack

We didn't just grab software off the shelf; we actually built this whole solution using Microsoft's Power Platform. Think of it as a CRM we custom-built, fully integrated and designed specifically for health consulting firms like yours. Our main goal was to make it easy to manage, truly secure, and flexible enough to genuinely grow with your business.

Dynamics 365 Sales

Dynamics 365 Sales forms the core of our CRM. It manages all the essentials – leads, opportunities, accounts – but we really customized it to fit how your health consulting workflows operate.

Dataverse Data Model

We designed a new data model in Dataverse. This means custom tables for every key piece of information: clients, contacts, coverages, carriers, vendors, pharmacies, opportunities, even competitors. The best part? Everything is connected, so your data stays accurate and consistent across the whole system.

Power Automate Workflows

Power Automate allowed us to automate many tasks. This includes routing new leads, sending renewal reminders, managing service level agreement escalations, and streamlining approvals. It significantly reduces manual effort and ensures your business rules are followed consistently.

Dashboards

These dashboards provide a clear, interactive view of everything important: your renewals, the health of your sales pipeline, and how well you're covering different services. It's designed to help leadership quickly spot trends and make smarter, data-driven decisions about how to best allocate resources and drive growth.

Security & How We Deployed It

We built the security framework right into Azure Active Directory. For your team, this means they sign in once and instantly get secure access to Dynamics 365, and all other connected systems. We used group-based security, which links permissions directly to roles and regions. This makes managing access simple: when someone joins, leaves, or changes roles, their system access updates automatically by adjusting their group membership, rather than dealing with individual settings one by one.

Our deployment process follows industry best practices for Application Lifecycle Management (ALM). We use solution-based packaging and smart deployments that easily adapt to different environments. This keeps your development, testing, and live production systems consistent, ensuring safe testing and reliable quality checks. Plus, automated deployment pipelines really cut down on human error, meaning updates are quick, dependable, and smooth as your needs evolve.

Ready for Future Integrations

While our initial focus was on the core CRM features, we designed the architecture so it can easily connect with other systems down the road. Imagine linking it with marketing automation tools, document generation systems, data warehouses, or even specialized actuarial tools. Dataverse was built with an API-first approach, and the Power Platform has a massive library of connectors, so expanding its capabilities or integrating with external systems will be straightforward when you're ready.

> "The technical foundation we've laid isn't just for today's needs. We built it to evolve with the firm, ready to scale as the business grows into new markets and offers more services."