

Case Study

Exact Medicare

Watch Video Testimonial 

Business Type

Medicare Agency

Website

exactmedicare.com

Location

United States


Business Need

Operational time and cost time savings
Enhanced reporting and workflow management
Customized brand communication

Connex One Solutions

 Omnichannel

 Athena AI

 Quality Management

 Form Builder

 Marketplace

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"I would definitely recommend Connex One to other health care providers. It is a leading platform in this industry."

Ezequiel Negron,
Director of IT

"The fact that we can train our own large language model to match our brand voice is pretty substantial."

Harley Allaby,
Director of Operations



Elevating Customer Service: Exact Medicare's Journey with Connex One

About Exact Medicare

Exact Medicare is a leading Medicare agency dedicated to helping individuals to find the right Medicare services for them. With a focus on trust, integrity, and genuine care, Exact Medicare's team of experienced healthcare professionals work closely with each client to understand their unique needs and preferences, taking the time to help clients make informed decisions about their healthcare coverage.

Whether someone needs a Medicare Advantage plan or a Part D plan, Exact Medicare has the expertise to help. With its comprehensive knowledge of Medicare and commitment to client satisfaction, their commitment to excellence drives the agency to continuously improve and adapt to meet the evolving needs of their clients.

The Challenge

As Exact Medicare expanded its reach and client base, the company faced a growing demand for personalized assistance and streamlined operations in the complex landscape of Medicare services.

With the need to effectively manage customer interactions across multiple channels and ensure compliance with industry regulations such as HIPAA, Exact Medicare required a robust technological solution.

Connex One emerged as the ideal partner to address these technical requirements, offering tailored solutions to support Exact Medicare's growth objectives and elevate the overall customer experience.

Case Study

Results

Connex One's pivotal role in Exact Medicare's journey is acknowledged by Harley Allaby, Director of Operations. "We can use AI to have conversations for us and ensure that when our agents are connecting with customers, it is quality. It's the kind of interaction and the kind of customer that we can actually support."

Ezequiel Negrón, Director of IT, highlights the user-friendly nature of the Connex One's workflow building tool Flows. "What I love about the Flows is that it's allowed us to make big changes very quickly with new lead vendors that are coming in, with how we want our agents to receive calls. It's been a game changer and I'm excited to continue to dive in."

Connex One's integration of chatbots has also significantly reduced wait times for Exact Medicare, providing a streamlined experience for customers. Through deployment of automated self-service solutions, the agency's agents are able to focus on complex cases, enhancing customer interactions and satisfaction rates.

Compliance and Security

Exact Medicare prioritizes compliance with regulations like HIPAA, and Connex One's advanced security features ensure the protection of sensitive customer data. This fosters trust with clients and safeguards against regulatory issues, allowing Exact Medicare to focus on delivering top-notch service without compromising on security.

Brand Communication

The ability to create custom AI messaging that accurately reflects desired brand voice has positively impacted Exact Medicare's CX plans. "The fact that we can train our own large language model to match our brand voice is pretty substantial." - Harley Allaby

Cost Savings

Looking ahead, Exact Medicare hopes to continue the cost savings they've experienced: "I wouldn't be surprised if it's close to \$100,000 that we save over the year." says Ezequiel Negrón.

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We're saving money, we're also getting a better experience and a better software which is pretty crazy.

Harley Allaby,
Director of Operations

Conclusion

Exact Medicare's strategic partnership with Connex One has yielded remarkable results, propelling the organization to new heights of excellence in customer service and operational efficiency. As Ezequiel Negrón, Director of IT, attests, Connex One's 'unparalleled support' has played a pivotal role in this success, with their exceptional customer service setting a new standard in the industry.

Moving forward, Exact Medicare will continue to leverage Connex One's cutting-edge technology and unwavering support to enhance the customer experience and drive organizational growth. With Connex One by their side, Exact Medicare is well-positioned to navigate the healthcare industry's evolving landscape while maintaining their commitment to excellence and providing unparalleled service to their clientele.