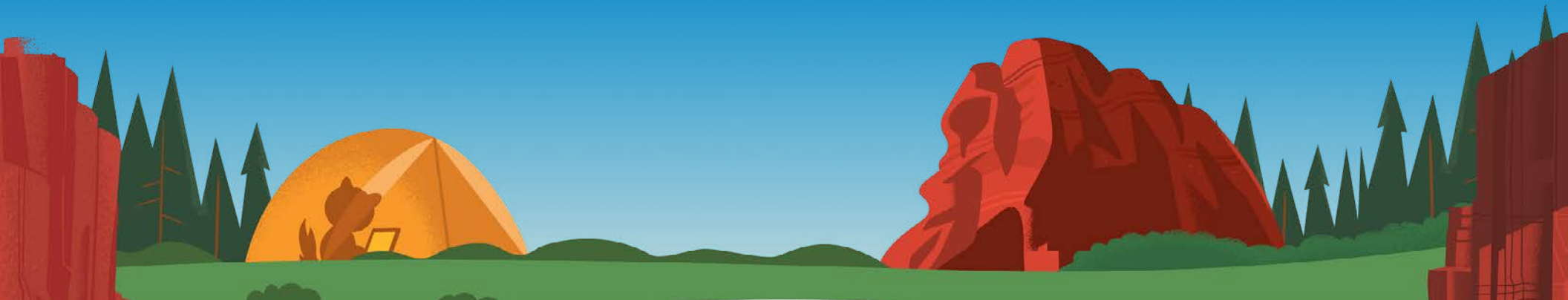


salesforce

# How Salesforce Is Using Human-Centered Technology to Modernize and Better Serve Citizens





## Understanding and Overcoming Obstacles in the Federal Health Landscape

The mission of the medicaid-focused federal agencies is foundational to the United States' public health care system: Ensuring over 100 million people receive and maintain medical coverage. Unfortunately, antiquated systems and manual processes often silo workflows and impede productivity, burdening hard-working employees.

“What we’ve noticed is that these agencies are using multiple legacy systems leading to operational inefficiencies,” says Rinku Sinha, who serves as a Lead Solution Engineer for Salesforce. “Users are using disparate systems and applications to do one job, so they could spend anywhere from 5 to 10 minutes doing one task on one application. Those minutes add up throughout the day switching back and forth among different systems.”

As it stands now, it can take months to intake, process and complete a beneficiary application – a pace that is simply not compatible with the expanding and evolving medical needs of the public.

“Government doesn’t have time to wait to get the data that they need from older systems,” says Kristen Gratton, an account executive for Salesforce. “They should have a workflow in place to complete applications in a timely manner.”

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**Kristen Gratton, Account Executive, Salesforce**





Disparate processes don't just waste time and resources, they also prevent employees from having a holistic view of their beneficiaries and, thus, understanding the full scope of their unique needs and challenges.

"The goal is to serve the citizen in the most efficient and beneficial way possible, and when you have a variety of siloed systems in place, from an employee perspective, there's frustration that you can't offer your best services and resources," explains Gratton, who notes that this also negatively impacts the citizen. If an individual is not receiving the help they need in a timely manner, they are less likely to reach out to the organization in the future – a lose-lose situation.

In recent years, benefit-focused agencies have invested in intuitive technologies that create a streamlined experience for employees and constituents alike. This effort is in large part due to the Biden Administration's [Executive Order on Transforming Federal](#)

[Customer Experience](#), which called for all federal agencies to "use technology to modernize Government and implement services that are simple to use, accessible, equitable, protective, transparent, and responsive for all people of the United States."

"I think the EO is a great opportunity for agencies to put customer success above all else," Gratton says. "A lot of agencies are moving towards recognizing that the customer experience is more than half the battle when it comes to sharing the resources that your agency has to offer."

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With such a herculean assignment on their shoulders, Gratton states that Medicare & Medicaid administrators must seek out the right tools and resources that allow them to perform at the highest capacity to create a more efficient and engaging experience for their key stakeholders – employees that are looking to provide access to tools and resources, beneficiaries that need health care, as well as the providers and hospitals that are administering the care.

## Reflection, Communication, Collaboration Are the First Steps to Modernization

Modernization can seem like a long, daunting process, and a tempting first step for many is to implement as much new technology as quickly as possible. But according to Sinha, technology adoption should begin with an internal audit to thoroughly evaluate current processes and discover pain points. This rings especially for federal health-driven organizations that house

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several different teams with competing needs and unique requirements.

“There are many different groups, it is really important to do a little self-reflection and uncover current challenges,” Sinha says. “Once you identify those challenges, you can begin forming KPIs in terms of how you will measure success.”

During evaluation, working groups should also communicate with one another, or even other agencies, that have recently undergone similar technological changes and updates to ease any fears or hesitation, compare notes and get a clearer picture of what’s to come.

“If they want to bring an application on board, and there’s a team that has already done something similar, my first recommendation is always to ask some questions, and see what they can share about how they onboard,” Gratton says, explaining that talking to these groups will help provide insight into the specific processes and potentially even inspire some new ideas.





“The collaboration across different working groups and centers is important to learn from the experience of others and figure out how their success is measured and defined to better define your success parameters,” adds Michael Sarkis, account director at Salesforce.

Perhaps most importantly, medicaid-focused agencies must garner insight from those who will use the technology externally – citizens and providers – by offering opportunities to contribute their feedback on what is working, or not working, in the current systems.

“An agency can only be as productive as the feedback and the engagement that they’re having with their stakeholders,” says Gratton. “So we want to make sure that agencies are offering up the best care and support that they can to those that they service.”



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**Our value really lies in the fact that our products provide this 360 view. We unify products under one platform providing that single source of truth. You can have a single shared view of your customer all in one place without having to swivel among different applications.**”  
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It is critical to involve each stakeholder group in the process from the start and take the time necessary to incorporate all feedback for a long-lasting, positive end result. This communication and collaboration will eventually help lay the groundwork for a stronger overall governance model for modernization across the agency.

In the future, when a group wants to adopt a new tool, they’ll have proper procedures and proven best practices to refer to for seamless implementation.

“Then there can be a governance model in place that gives them a directive of who to reach out to for information about this tool, what the process is for getting this tool onboarded, how to set up funding and best practices to get this tool up and running,” Gratton says.



## User-Friendly Tools Streamline Workflows and Drive Productivity

After the internal reflection comes the next phase of modernization: Deciding what tools and technologies to invest in that best meet stakeholder needs. An easy way to identify optimal products is to turn to trusted industry companies experienced in federal modernization, preferably in the Medicare and Medicaid space, companies like [Salesforce](#).

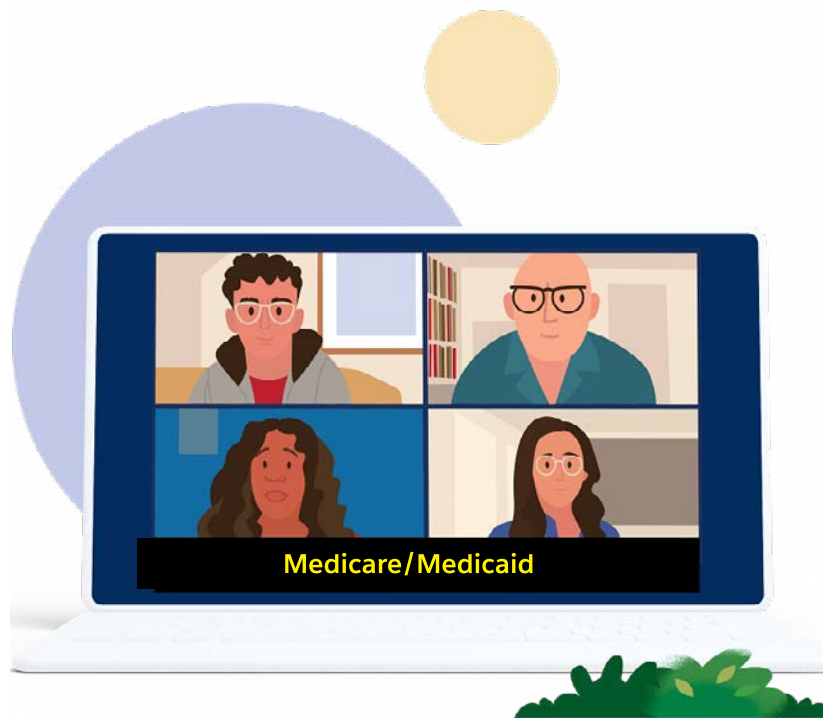
For over a decade, Salesforce has worked with medicaid-focused agencies to streamline operations and have helped stand up a variety of user-friendly, modernized applications that operate based on a single source of truth – data is centralized from many systems within an organization to a single location.

“Our value really lies in the fact that our products provide this 360 view,” explains Sinha. “We

unify products under one platform providing that single source of truth. You can have a single shared view of your customer all in one place without having to swivel among different applications.”

Among their most successful products is [Customer 360](#), a case management platform that gives agencies a dedicated, customizable workspace and a variety of productivity tools, such as knowledge management, automation and omnichannel routing that automatically sends cases to a specific employee based on employees’ skill sets and availability.

Additionally, the solution saves time by quickly answering questions or solving simple problems for beneficiaries and providers by directing them to website articles or AI solutions like chatbots, allowing employees to stay focused on their most important work.





“With Salesforce, federal health agencies have been able to allow their beneficiaries or providers to log into a personalized platform portal application to get questions answered with self-help, contact an employee for one-on-one support and submit documentation all in one place,” Gratton says.

Concurrently, Salesforce’s [Public Sector Solutions](#) are designed to meet the specific needs of government tasks, providing pre-built, out-of-the-box solutions for many different use cases, along with a toolkit that automates the often-daunting form creation process.

“The legacy platform or application that a lot of federal agencies are using to create forms for intake might take months, whereas with Public Sector Solutions, you could do that in a couple of weeks, which allows for a faster time to value with the declarative nature of our platform,” Sinha says.

Not only are all Salesforce products connected to a single source of truth, they are also low-code. Low-code platforms are scalable and let the agency maintain autonomy over

their systems by empowering everyday users to easily update and make their own changes without having to worry about maneuvering complex code or relying on developers.



“For example, if you want to create a new field on a web form, you do not have to rely on a developer to implement it. We promote ‘clicks before code’ so everyday business users are empowered to make changes because our platform makes it that easy.”

“Our tools differentiate us because they put the agency as a stakeholder first,” Gratton adds. “Employees have the autonomy to take control themselves without needing to wait to get something done for them.”

Another imperative for Salesforce is to encourage transparency and collaboration. With their solutions, employees can tag relevant parties in a case file. If there is a discrepancy in a benefit application, or an employee needs help getting beneficiary resources from another office, they have visibility into who else within their organization has worked on the application.



“A lot of the time, something doesn’t just sit within one office,” Gratton says. “There are so many people that need to be involved in these processes. Salesforce as a platform allows for that collaboration and engagement from all areas of the agency.”

The bottom line is, Salesforce specifically designs their resources to be human-focused, so they create a guided experience that digitizes federal health processes, creating interactive, user-friendly experiences.

## Securing the Future with Salesforce at the Enterprise Level

Throughout their tremendously fruitful yearslong work with medicaid-focused agencies, Salesforce has helped stand up several different applications and resources. And though their solutions have helped modernize organizations, implementation has been somewhat inconsistent. Salesforce is now actively looking for ways to cement themselves as a more permanent fixture.

“Medicare and Medicaid administrators started using Salesforce to improve speaker request intake forms,



and that set the standard for what Salesforce was capable of,” Gratton says. “They are still relatively siloed, and we’re working towards a more consolidated enterprise view of Salesforce at the agency.”

A pivotal step so far has been the streamlining of Authority to Operate (ATO) processes, a formal declaration that authorizes operation of a business product, for Salesforce products. Now, rather than conducting a new ATO process for each individual Salesforce application, which can

be time-consuming and costly, agencies can leverage the Platform ATO already in place.

“Anyone that wants to set up Salesforce does not have to go through that long, strenuous, expensive ATO process every time,” Gratton says. “It’s right there available for them already, so those that had taken maybe a year to get up and running, can now get up and running in three months.”

What’s more, medicaid-focused agencies have created a [Center of Excellence](#) out of the Office of Information Technology – a central governing body to set best practices and make decisions about Salesforce investments. The center will prevent duplicative efforts



and establish a strong governance model for Salesforce projects.

“If an office is looking to bring on Salesforce, they will go through the COE, explain what their use case is, and be directed towards an existing application that has a similar use case, or if they are the first, see what steps they need to take to implement,” Gratton says.

As Salesforce continues to immerse itself in federal health benefits at a high level, they will be able to consolidate the use of their tools and ensure they are being used in the most effective way.

“It’s just a matter of trying to figure that out, how to implement and when to implement so they are not reinventing the wheel every time they want to onboard an



application,” Sinha says. “That will be revolutionary, not just for the employee experience, but also for the beneficiary as well.”

Ultimately, although there is still a lot of work to do to achieve full modernization, Gratton is confident that Salesforce and federal health-driven agencies are taking the right steps to create a solid foundation for a bright future.

“What these agencies are doing really well right now is self-reflection, but then sharing this self-reflection around the agency and asking, ‘Can we do better next time? What tools are working for us and what tools are not?’” she says. “They’re really learning to communicate around the agency and not operate within those silos. It has been a game changer.”

**Learn more about how Salesforce is using human centered technology to modernize and better citizen services.**

