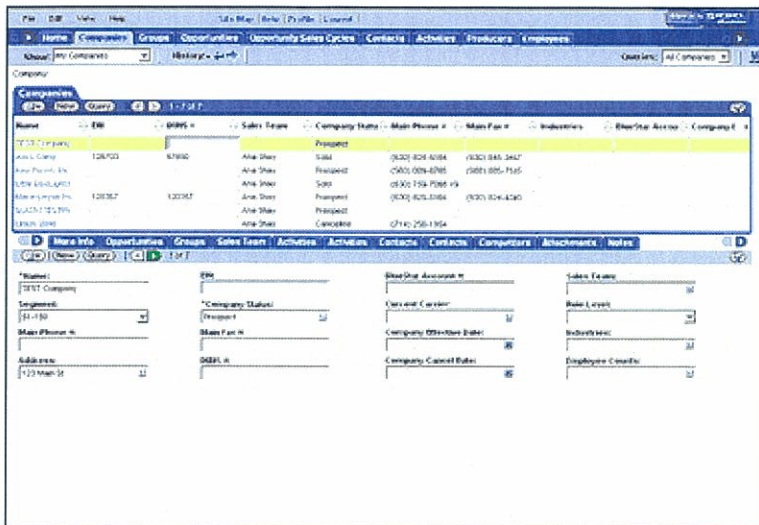


Suite of Applications

Prospecting:

The challenge of investigating business opportunities has been made easier through BA's prospecting component. Prospecting centralizes the storage and maintenance of information about businesses or former accounts in order to pursue them as potential sales.



The process of **Prospecting to Request for Proposal (RFP)** and **Maintaining Existing Accounts** occurs within Siebel SFA which handles all prospect identification, contact management, and broker management. There are four primary sub-processes from **Prospect to RFP**. Producer tasks are associated with the following sub-processes:

- *General Information* – Producer queries and views information
- *Enter Prospect* – Prospect is created by entering a Company and a Contact
- *Company Maintenance* – Producer performs maintenance to a Company or Group; this type of maintenance happens prior to a request for proposal. (At this stage, no information has been sent to Workflow.)
- *Prospect Maintenance* – Maintenance is performed to the Prospect. This occurs prior to Workflow requesting the information to be sent

For **Existing Accounts**, there are two primary sub-processes. They are:

- Account Maintenance
- Cancellation and/or Reinstatement

Existing Accounts include accounts that have already been created, those that have been sent to Workflow, and sold proposals (small sold group data is transferred from BlueSTAR). Producers can perform maintenance on existing sold accounts (e.g. adding a contact, phone number, etc.) or cancel/reinstate an account.

Data from SFA is then imported into the Large Group Proposal Workflow, which is where the *RFP to Close* process takes place:

RFP to Close

- Enter Quote Information
- Broker Registration Process
- Collect Required Information Prior to Internal Review
- Internal Review Process
- Generate and Deliver Proposal
- Negotiate and Customize Proposal
- Close Proposal

The actual execution of the sales processes are completed using Workflow.

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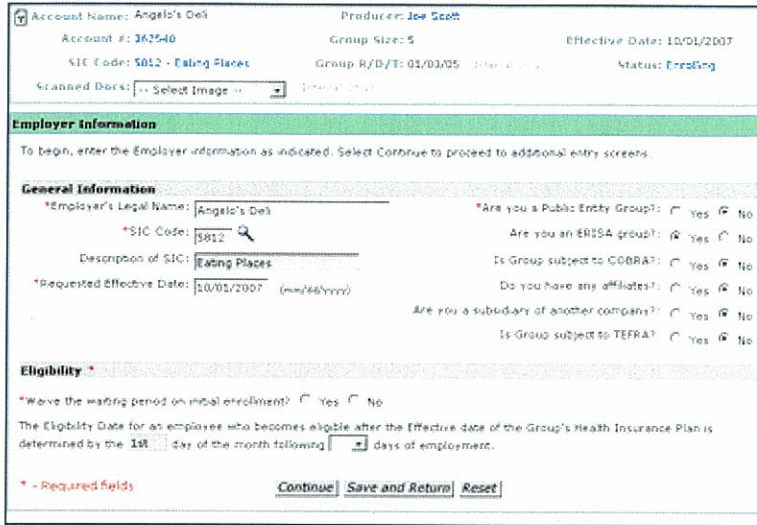
Suite of Applications

Data Collector:

This practical BA component allows internal and external users to take information from a quote, supplement the information, and then reconcile it with employer and employee applications. All information entered into Quoting (account, address, billing address, etc.) comes over to Data Collector which saves time and decreases the amount of rework users will have to do.

In Data Collector, users are allowed to:

- Change any elections they made in Quoting
- Choose the plan they wish to enroll in:
 - Plan elections include:
 - HMO
 - PPO
 - Life and Dental (Data Collector gives option to decline these offerings)
 - Beneficiary information
 - Dual Coverage for Husband or Wife
- Supplement medical data (action available to both internal and external users)
- Enter Spouse and Child(ren)/Dependent data
- Reconcile the data with employer and employee applications









At the front end of the business, Data Collection refers to broad classes of data or documentation:












Group level – Account information that includes group characteristics, data for underwriting rating and analysis, product selection, eligibility periods and other provisions.

Census level information – Subscriber information including demographics, product selection, provider selection, medical history, supporting documentation, etc.

Once the broker releases the quote, it is sent to the Small Business Service Center who pulls up the quote and makes sure it's the right one. The quote eventually flows to Medical Underwriting which sends the rated quote back to the broker to take to the prospect. Afterwards, the enrollment data becomes accessible to Rating and is ultimately transferred to the membership system (BlueStar and FDL).

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WorkFlow (Business Process Management):

WorkFlow drives business activity by orchestrating the flow of automated and manual account enrollment activities, and associated user roles. It tracks the significant events needed to set up a new account with its members.

WorkFlow routes work from one department to another department. Once a step is completed, the account is automatically sent to next person. This flow of account activities is orchestrated among in-house personnel; after each activity's completion, WorkFlow then notifies the BlueTrack application of enrollment status. WorkFlow additionally triggers an automated feed of enrollment data for the BlueStar health membership system.

WorkFlow provides the access point to and from component applications. When the activity is being performed, the workflow engine helps navigate to and from the component applications required to complete it.

This component is also where each activity and task within that activity is specified, and work queues are designed with activities for a specific role and person to perform:

- Work queues for individuals are established and connected to an in-box where cases in various stages of a process can be accessed, processed, and then are removed once completed.

To begin WorkFlow, a search on the WorkFlow home page is required. Once the activity is checked-out, the user clicks on the activity link to perform the activity or resume work.

Workflow User Types:

- Sales Support
- BlueStar Sales Support
- GBU Underwriting
- Medical Underwriting
- Broker Administration
- Incentive Administration
- Benefit Coding
- Contract Services
- FDL
- DentalNet

WorkFlow includes an administration element which specifies an organizational structure, or hierarchy, for the operations of the process. Generally, the hierarchy helps establish a virtual organization where work (activity) reporting relationships are specified according to manager, supervisor, staff person, etc. Similarly, different types of functions can be performed by certain levels in the hierarchy:

- A manager can work, assign, and change priorities of all accounts involved in the manager's area (s) of responsibility:

Enrolling										
Renewing										
WorkFlow Activities of Pamela Woods										
2 of 2										
Assigned	Activity	Status	Case Nbr	Acct Nbr	Acct Name	Effective Date -	Age (Days)	Producer	Notes	Priority
Pamela Woods	Verify Paperwork Link	Ready	2214	062540	Angelo's Del	10/01/2007	1	Joe Scott		Low
Pamela Woods	Inventor's of Documents	Ready	2202	086601	Paradise Builders	10/01/2007	2	James B. Murray		Low
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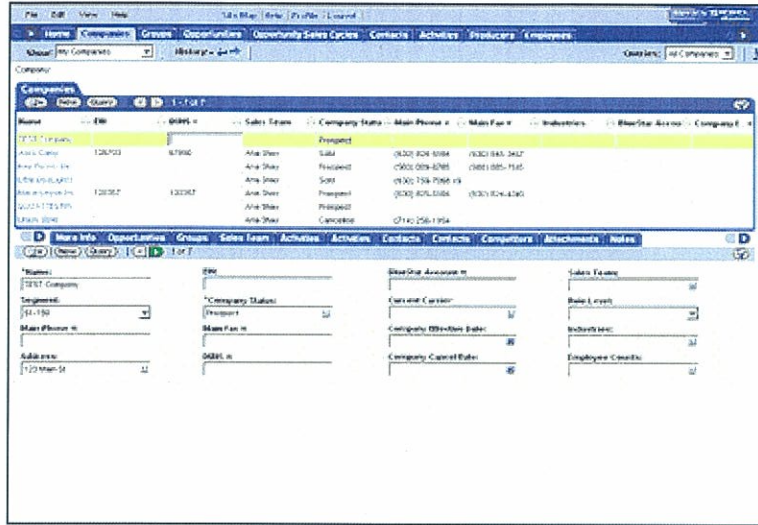
- Accounts that haven't moved within WorkFlow Manager for a specified number of days will appear in a popup when the manager selects the View Alerts link.
- A supervisor can view all their work in the work queues for an individual or across individuals, and sort and filter these views in a number of ways:
 - E.g., transferring a case or specifying when someone is unavailable for assignment can be carried out by a supervisor for their staff; a manager can do a similar function across their many supervisors or their staff.

The WorkFlow engine also can read rules that may change the routing or initiate an activity depending on the conditions, statuses, or particular characteristics of a process or an account within a process.

Suite of Applications

Sales Force Automation:

SFA, also called Siebel, is BA's Mid-Market and Major/National accounts management system. It is used to manage brokers and their business interactions with HCSC.



SFA provides a single, comprehensive view of customer activity and supply chain information by consolidating broker, contact, and prospect management data. Its enhanced applications for sales force automation enables HCSC to respond quickly and accurately to customer inquiries, and better service BA customer needs, through information oversight and proficiency tracking. SFA works with BlueStar for maintaining prospect and existing account data for Large Group quoting. Data from this system is then imported into the Large Group Proposal Workflow, which is where the **RFP to Close** process takes place.

The initial entry point for Large Group proposals is SFA, as these proposals initiate within Siebel (i.e. an opportunity is created in Siebel when that account wishes to obtain a proposal); Siebel pushes that event to the Workflow platform.

SFA helps users:

- Share data across sales teams
- Manage sales pipelines
- Rapidly create customer proposals

SFA stores master data for producers, including contact info and coverage teams:

- It automatically records all stages in a sales process and tracks all contact made with a given customer, the purpose of the contact, and any follow-up that might be required. This ensures that sales efforts won't be duplicated, thus eliminating the risk of irritating customers.

The Siebel SFA Home screen includes a tab for each screen in the application. The screens are like categories of information and include such things as Companies, Groups/Sections, Opportunities, Contacts, Activities, Producers, and Employees.

SFA initiates cancellations and renewals for sold accounts, feeds BPM prospect data, and receives status updates:

Delivering Status Between Siebel SFA and BPM:

- Once user initiates a Request for Proposal in Siebel, the case is sent to BPM. The BPM accepts incoming messages in a compound message and responds to Siebel SFA. Proposal updates are returned to Siebel on demand and the Siebel SFA application sends a message to BPM requesting outstanding status updates.

Siebel SFA passes the following information to BPM:

- Control Plan

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