

Optimize and streamline your lead generation and customer support process.

Hx Salesforce Connector

The Healthx Salesforce Connector provides a growing library of API integrations that can create and modify data objects in Salesforce. Your operational, sales, and marketing teams can now take full advantage of your customer relationship management system (CRM) to grow your membership and deliver an exceptional experience for your current members, providers, employers, and brokers.



Grow your membership by capturing leads from prospective members who visit your member portal to learn about your products and plans. Having these leads in your Salesforce CRM helps your marketing and sales teams engage, nurture and convert your prospects into members.



Increase trust and satisfaction with your members, providers, employers, and brokers by streamlining the customer support process. Give your customer support representatives the ability to work in their primary tool, the CRM, to manage support cases.

Features:

- Automatically create Salesforce leads via the Salesforce API based on interest in the content you make available on your member site.
- User inquiries, requests for information, and provider registrations can automatically trigger case creation via the Salesforce API. The cases are assigned to an employee, such as a customer support representative for follow-up.
- Salesforce contacts can be automatically created or updated via Salesforce API using the member eligibility data housed within the Healthx platform.
- Link directly to the Healthx Admin portal from Salesforce, allowing one-click access to all the relevant information and Hx administrative tools.