

CASE STUDY

How UPMC Health Plan put an end to duplicate data with RingLead



Overview

The Company

The University of Pittsburgh Medical Center (UPMC) Health Plan is the second largest health insurance provider in Pennsylvania. With 250 Salesforce users, UPMC Health Plan uses Salesforce mainly for health insurance sales, as well as marketing campaigns.

Industry

Accident and Health Insurance

Challenge

UPMC struggled to accurately report on the business because of duplicates data—both existing and newly created from various sources.

Solution

RingLead Cleanse and RingLead Prevent

Results

UPMC deployed RingLead Cleanse and RingLead Prevent to tackle its duplicate situation, both retroactively (Cleanse), and proactively (Prevent).

Business Challenge

UPMC was going through many Salesforce integrations, and recognized messy data impacting its quoting system, its reporting, its ability to merge records, and the inability to make enhancements. Bad data was coming into Salesforce through three main avenues: manual entry from sales reps, web form submissions, and in-store entry.

Solution

UPMC deployed RingLead to control all data coming into Salesforce with a streamlined approach to identifying and merging duplicates.

When paired together, RingLead Cleanse and RingLead Prevent, empower a business with complete control over duplicate, unstandardized data. Both solutions are equipped with fuzzy matching logic to provide complete flexibility over how duplicates are identified.

Cleanse and Prevent are both available as stand-alone solutions, or as components of RingLead's fully integrated solution: The RingLead Platform.

Results

With RingLead, UPMC was able to:

- Reduce time it takes to find and merge duplicates
- Create clean, accurate, and reliable Salesforce reports
- Remove all duplicate Leads and Accounts in two months



We were bleeding, we just didn't know it until I started investigating. We learned that the quality of the data was not that great, and every time we exported a report, I always had to go into Excel and modify it. Now with RingLead, our Salesforce reports are clean.



Christopher Tribanas

Commercial Operations and Analyst

