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Michael Aldersea
System Administrator
MDA National

MDA National Insurance

MDA National continues to find benefits with Pivotal as their client services go online

In 2003, MDA National decided to update its existing client database software after the Australian Government introduced new regulation and compliance standards for the medical indemnity insurance industry. MDA National wanted a customer relationship management (CRM) tool that offered sophisticated data capture and retrieval systems in order to provide its members with exemplary service and to allow collection and transfer of information to the newly established regulatory bodies.

“MDA National had been using an industry-vertical membership database for some time. While this served us well in the past, it was a DOS based system and was limited in the amount of data it could capture and its reporting and analysis capabilities were low. We were looking for a solution that would give us greater flexibility and let us manage our members’ information more effectively,” said Julie-Anne Shields, Manager Information Systems, MDA National Insurance.

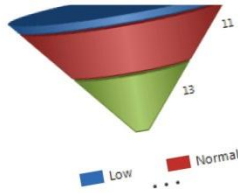
After implementation through Eclipse, MDA National found Pivotal’s CRM database functionality had not only automated existing data capture procedures but improved overall team efficiencies.

“Pivotal has given us time savings, improved workflow, enhanced reporting and analysis and better data capture and segmentation,” said Shields. *“Pivotal gives us faster response times and access to accurate comprehensive member information, which has improved our service to members. The system is extremely scalable regarding the amount and type of information that can be captured for each member. Our customer service staff now know more about each member, instantly.”*

Providing “value-add” services to clients

Five years later in 2008, Pivotal was still meeting MDA National’s database needs but they wanted to expand the functionality gained from Pivotal. With their client base continuing to grow beyond 20,000 members across Australia, MDA National wanted to provide more autonomy and self-service functionality to their clients with the ability to update their personal details, renew policies and register for upcoming events online.





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“Previously we didn’t have online website integration with Pivotal. Our members would have to phone our Member Services department and we would mail them a document or send information via email manually. As our members are very busy doctors, we wanted a solution that would save time and be more convenient,” said Michael Aldersea, System Administrator, MDA National Insurance.

Satisfied with the technology platform, functionality and flexibility provided by Pivotal, MDA National contacted Eclipse to integrate Pivotal with the new Members Online Services (MOS) area of their website.

New modules including Events Management, Online Renewal, Incident Notification, Updating Contact Details, Other Payments, Policy History and Risk Management assessment tools were implemented to provide MDA National’s members with access to their personal policy details via MOS – 24/7.

Fully integrated into Pivotal, the web interface automatically updates any new information such as member details, event registrations and policy renewal payments. The information is entered directly into the members profile in Pivotal, eliminating the need to manually update profiles and reducing ongoing administrative tasks and data errors.

In addition, the new online service provides members with the ability to print a Certificate of Currency, download policy information or answer pre-renewal surveys, at a time convenient to them. This self-service access has benefited overseas members, who previously needed to wait for Australian office hours in order to speak to Member Services.

The online service has also streamlined the payment process. As Pivotal is integrated into MDA National’s financial software, Microsoft Dynamics GP, members can elect their policy renewal preferences online, automatically updating their records in Pivotal and incorporating their details into the next payment round.

“The system integrates into our financial solution for online renewals. If they decide to process a direct debit from a bank account, the interface will set up the bank details into our system directly, and then later on we will run a bulk process that will create all the direct debit payments and information that we need to send to the banks,” said Aldersea.

Outcome and benefits

After an initial soft launch of the online service, MDA National has seen a dramatic increase in renewal payments online in the past year from approximately 700 in the first year to 2100 in the past year.

“The new system saves a lot of time. For example, if a member pays online, they don’t need to return the renewal form, which means there is less filing for us. Also, if members don’t return a pre-renewal survey questionnaire in the post, we don’t have to manually process it into the system, it just automatically updates under the members details.



Customer:

MDA National

Solution:

Pivotal CRM

Industry:

Banking & Finance

About MDA National:

MDA National is a mutual Medical Defence Organisation, founded in Perth in 1925 to protect the interests of its doctor Members. MDA National owns a Medical Indemnity Insurer, MDA National Insurance Pty Ltd (MDA National Insurance). This company has issued Professional Indemnity Insurance Policies to Members of MDA National since July 2003.

Members of MDA National are also provided with first-class 24/7 medico-legal advisory and risk management services.

MDA National Insurance is one of Australia's leading medical indemnity insurers for Doctors, with over 80 employees in offices across Adelaide, Brisbane, Melbourne, Perth and Sydney.

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Moving forward, MDA National plan to upgrade to Pivotal CRM 5.9 as they are satisfied with the solution's ability to manage their clients data in the future. Going forward MDA National will also be considering and evaluating the new Pivotal 6.0 solution as a means to continue the use of Pivotal as their CRM in the future.

"We are very happy with Pivotal, so there is no reason for us to look elsewhere at this point. A lot of other tools aren't as customisable as Pivotal. The fact that we can bring a lot of the work internally, we can customise our workflows and make our own database tables and forms, is a real benefit."

MDA National's Pivotal system supports 80 users and utilises Eclipse's Support and Maintenance services.

"Eclipse Support Services are really good. The only time we need to call them is if there is a major issue. They will be on the phone straight away to help with a production environment issue. They are easy to get a hold of and very helpful," said Aldersea.

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