

Extending the Member Experience thru Data Activation

Stephanie Kistner - Solution Engineer





Are my provider in networks?

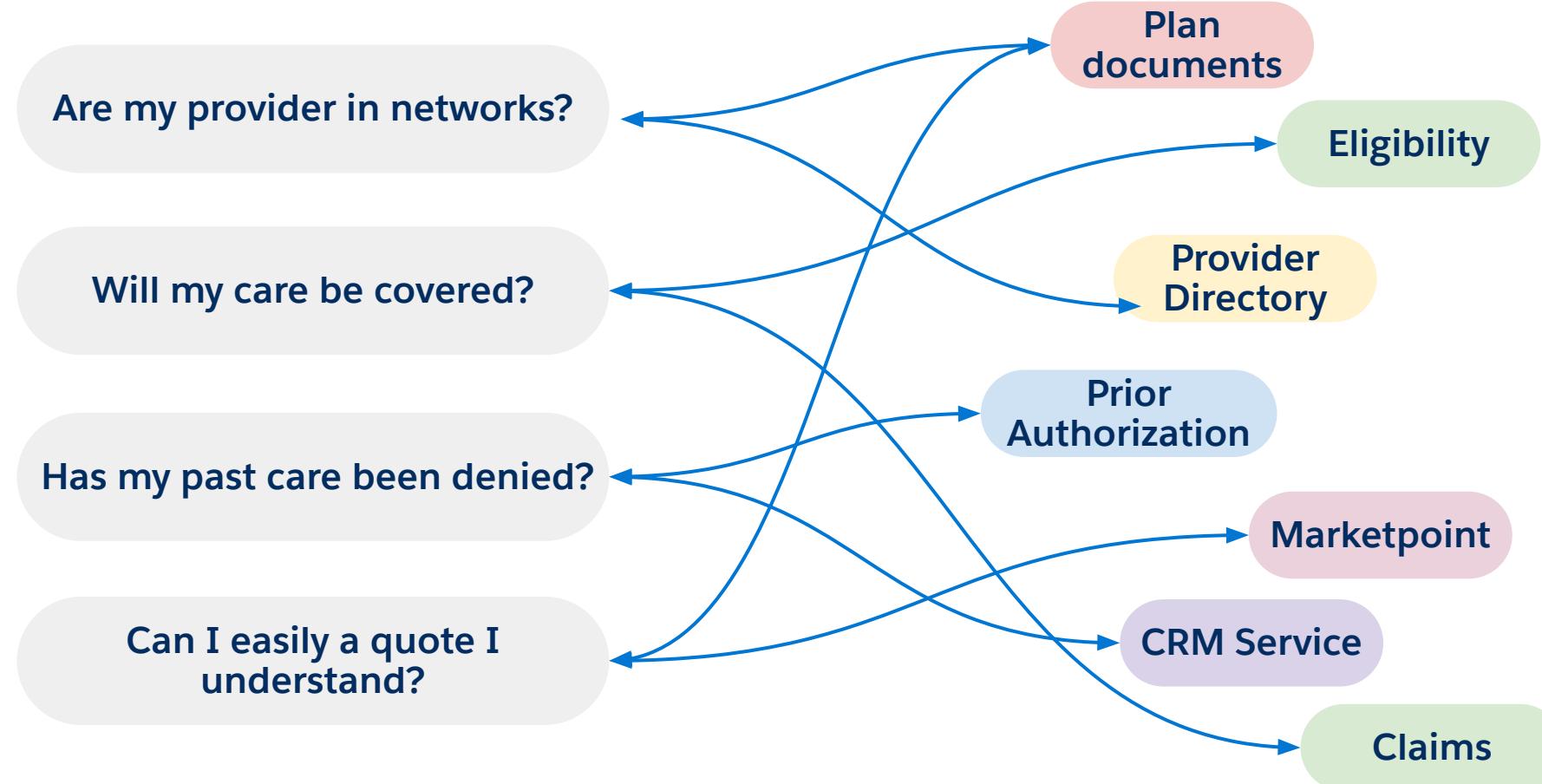
Will my care be covered?

Has my past care been denied?

Can I easily a quote I understand?

Charles Green
Medicare Member





Marketpoint 360

[*Humana Medicare Telesales](#) | Home | [Charles Green Lead](#)

Renewal Risk!

Qualified Status Qualified **Lead Status** Complete

Charles Green

Title: **Charles Green** Email: **charle@mail.com**

Phone: **1400-999-9999**

Renew Predictions

56% Predicted to Renew

Top Predictors:

- Recent claims have been denied
- Active Doctor in network

How To Improve This:

- Book an appointment reminder
- Email Doctor in education campaign

Einstein Scoring

97 Lead Score

Top Positives:

- Takes over 100 calls
- State/Province is Colorado
- Lead Source is Phone Inquiry

Engagement Activity Contact Engagement Details

We found no potential duplicates of this Lead.

[Contact Center](#) | Home | [Charles Green | Action](#)

Profile AI Summary

Generated AI Summary

Here is a summary of the key information from the member record:

Member Name: Charles Green
Member Plan: Anthem Signature Service

Records (3):
5/27/2025, 4:48 PM
5/27/2025, 12:58 PM
5/21/2025, 2:59 PM

Top Care Gaps to Close:
- Limited PCP Activity: Consider helping the member find a more suitable PCP
- Diabetes Care Management: Encourage participation in diabetes management program

Top Member Value:
- Diabetes Care Management: Active participation has led to improved blood sugar control and better overall health outcomes
- Flexible Spending Card: Utilized for out-of-pocket medical expenses, helping to manage healthcare costs
- CareOneRx: Regularly used for prescription refills, offering convenient medication delivery and lower copays

This summary highlights the key details from the record efficiently. Please let me know if you need any clarification or have additional requests.

Action Launcher

Search actions... Update Contact Met, Launch Briefing, Create Case, Scribe, Referral

Related List Quick Links:

- Action Plans (2)
- Critical Service Requests (2)
- Service Appointments (0+)
- Opportunities (4)
- Cases (10+)
- ICT Meetings (2)
- Voice Calls (10+)
- Notes (0)
- Medication Statements (3)
- Member Plans (3)

View All

Next Best Action:

New Referral to Specialist: Proposed to guide senior to schedule an appointment for a new referral (Accept, Decline)

Flu Shot: Be a fighter! Your coverage includes annual vaccinations against the flu. Find a location near you. (Accept, Reject)

Claims **Details** **Cases** **Plan Preferences** **Schedule Appointment** **Details**

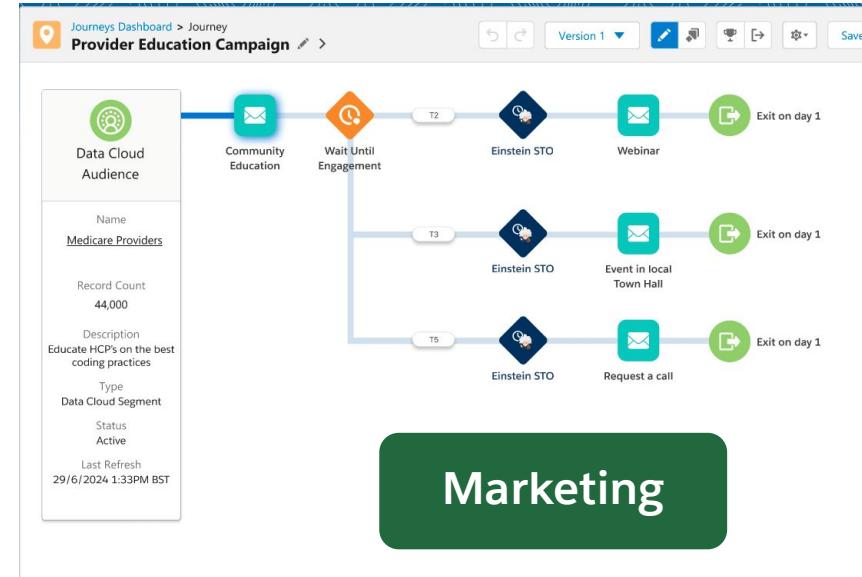
Authorizations (5+)



Charles Green
Medicare Member

CRM Service

Humana salesforce



Marketing



Member Navigation

OPEN NEW TAB

Patient Info



Maria Gonzales

Birthday

January 3, 1986 (39 Years)

Gender

Female

Patient Card

MAIN CLINIC

Makana PCP

LAST VISIT

12/14/20224

LANGUAGES

English

RISK LEVEL

Medium

OUTREACH FREQUENCY

Every Tuesday and Sunday

Maria Gonzales Timeline All Care Plan Contacts Household Care Gaps

Highlights

Life Events

Medications

Authorizations

Alerts



Person Account

Maria Gonzales

[Schedule Appointment](#)[Enroll in Program](#)

Profile

Claims History

Member Plans

Interaction Studio

Next Best Action

Find a Doctor

Select an OBGYN from a list of Ambetter Health Doctors.

[Details](#)

Enroll in Care Management

Enroll Maria Gonzales in Ambetter Health's Diabetes Care Management program.

[Details](#)

Next Best Content

Engagement

Chatter

Get In Touch

Email

mariagonzalez4884@gmail.com

Phone

(312) 412-0098

Communication Preferences

Phone, Email

Campaign History

OBGYN Onboarding

Start Date: 3/26/2025

Type: Marketing Journey

Status: Sent

[View All](#)

Member Navigation

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OUTREACH FREQUENCY

Every Tuesday and Sunday

00:08

Telephony & Transcription

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Details

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Details

Next Best Content

Next Best Content



Macros



History



Notes

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Maria Gonzales

Timeline

All Care Plan

Contacts

Household

Care Gaps

Highlights

Life Events

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[Schedule Appointment](#)[Enroll in Program](#)

Profile



marketing cloud

Portal & Outreach

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Every Tuesday and Sunday

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Timeline

All Care Plan

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Data Supply Chain & Data Lake



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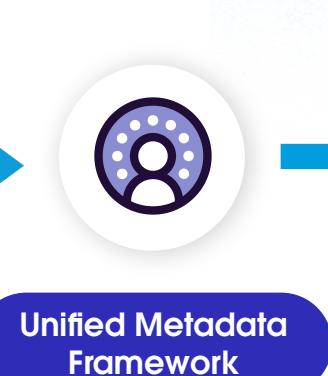
Connect Sales, Service, Marketing

Easily take action on unified data in all Humana's CRM apps



Use
ANY DATA
Source

CRM Service Org
Marketpoint Org
Marketing Cloud Org
External Data



Calculated Insights

- Predict likelihood to re-enroll
- Predict risk for attrition

The screenshot shows a lead record for 'Charles Green' in the 'Humana Medicare Telesales' app. Key details include:

- Renewal Risk!**: Status: Qualified
- Charles Green**: Title: , Phone: 440-555-9898, Company: Charles Green, Email: charlie@hotmail.com
- Renewal Predictions**: 56% Predicted to Renew vs. 45% last change. Top Predictors: 4% Recent claims have been denied, 4% Active Doctors are in network.
- Einstein Scoring**: Lead Score: 97. Top Positives: Tobacco User is No, State/Province is Colorado, Lead Source is Phone Inquiry.
- Engagement**: We found no potential duplicates of this Lead.

The interface also includes sections for Einstein Summary, Campaign Details, Previous Interactions, Preferences and Requirements, Additional Notes, and a sidebar for Lead Source and Next Action.

Marketpoint 360

To trigger
Calculated ACTIONS

Connect Sales, Service, Marketing

Easily take action on unified data in all Humana's CRM apps



CRM Service

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CRM Service Org

Marketpoint Org

Marketing Cloud
Org

External Data



Unified Metadata
Framework

Calculated
Insights

Predict
likelihood to
re-enroll

Predict risk
for attrition

The screenshot displays the Humana CRM Service interface. It shows a member profile summary for Charles Green, detailing recent activity, care gaps, and predicted churn risk (58%). Below this is a 'Plan Details' section for Humana Choice (PPO) with policy number H123123, showing member premium, employer premium, and total premium. The interface includes a sidebar with alerts, opportunities, and a search bar, along with various quick links and navigation tabs.

To trigger
Calculated ACTIONS

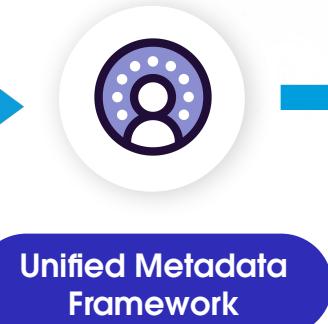
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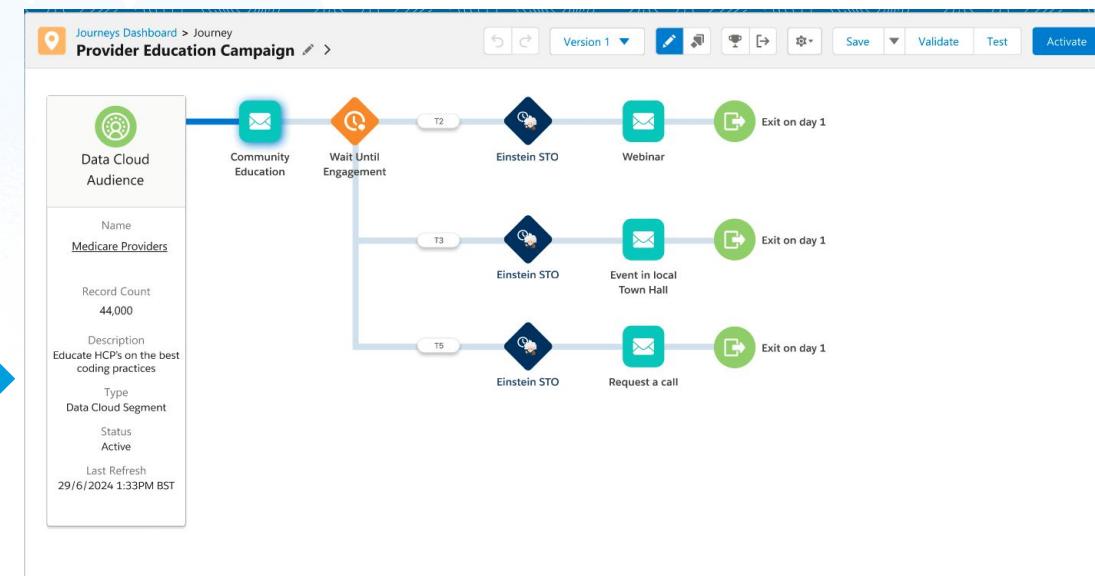
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Calculated Insights

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To trigger
Calculated ACTIONS

Propensity to Renew

