

## Blue Shield of California Case Study



*Simplify the execution of complex workflows in a regulated and highly-customized Salesforce.com environment to boost employee efficiency*

### ◆ About Client

Blue Shield of California is one of the largest not-for-profit healthcare provider networks in the US. Founded in 1939 and headquartered in Oakland, California, Blue Shield of California serves over 4 million customers and 65,000 physicians across the state. Recognized as one of the world's most ethical companies, Blue Shield of California (BSCA) has been continually receiving awards for their commitment to social responsibility and use of innovative practices.

### ◆ The Challenge

#### Improving user productivity on the Salesforce platform with a complex configuration

Blue Shield of California selected Salesforce.com to ensure that their important information flows seamlessly and accurately across all key stakeholders resulting in superior service delivery to its customers.

Due to core business and industry requirements, the implemented Salesforce platform no longer functioned as an intuitive “out-of-the-box” solution. Therefore, standard user training and training documentation from Salesforce was not adequate to meet the needs of BSCA. These complex digital workflows posed navigation and user experience challenges to employees putting productivity at risk. Even after BSCA developed specific training for their Salesforce use case it was not conveniently available within the application itself.

The sales training team at Blue Shield of California started looking for solutions which could improve speed and accuracy for data entry, as well as deliver learning content “in the precise moment of need,” to improve productivity.

### ◆ The Solution

#### In-App guidance for improved technology adoption and user engagement

MyGuide, by EdCast, was introduced as a solution to provide in-app training for all Salesforce users at Blue Shield of California. BSCA employees leveraged MyGuide “HowTo” tutorials with step-by-step instructions directly inside of the Salesforce platform. This simplified the user's workflow by enabling self-directed learning that was embedded in the process itself.

Step-by-step instructions that were specific to each role and type of user inside Salesforce, resulted in massive productivity gains and better accessibility to best practices and internal tacit knowledge. The MyGuide Creator functionality allows the BSCA team to author PDFs, videos, GIFs and other assets in less time to capture these best practices and tacit knowledge in the form of a guide.

## COMPANY SNAPSHOT

### INDUSTRY

- Healthcare Provider

### GEO SPREAD

- 1.4 Million health plan members
- 65,000+ Physicians across the state

### KEY CHALLENGES

- Simplify User & App Onboarding
- Reduce employee upskill time
- Decrease training support costs

### KEY BENEFITS

- Improved transaction response time with 35% saving on complex workflows
- 40% reduction in support costs
- Improved end user satisfaction index

### SOLUTION

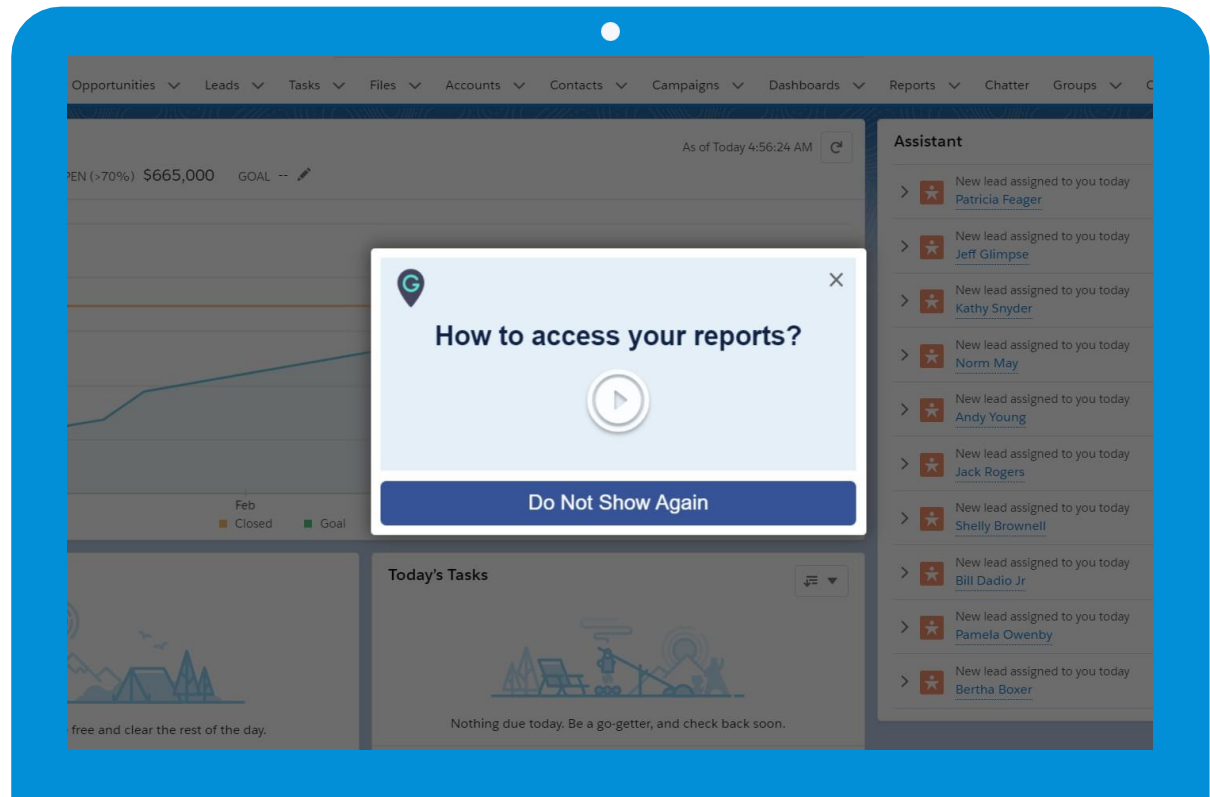
- In-App learning for seamless process step navigation
- Role based guides for consumption
- Automation for completing repetitive forms and data entry



## CUSTOMER TESTIMONIAL

*“The MyGuide team has been instrumental in making everything come together for training our sales team on many complicated processes. It has been great to see leadership and support from both sides to make this project a success. We have accomplished our initial goals of better retention of skills, decreased training costs, and increased productivity while working inside the Salesforce.”*

*Senior Manager Sales Training  
@ Blue Shield of California*



## 📍 The Benefits

### Effective app deployment and user onboarding to reduce support costs

The self-serve learning technology provided by MyGuide allows BSCA employees to access information when they needed it and replaces many ineffective classroom training exercises with previously poor retention. The “distance between learning and working” is effectively eliminated resulting in higher retention of skills and knowledge needed to perform complex workflows. Additionally, MyGuide has significantly cut down on support costs by reducing tickets and cases to Blue Shield’s internal help desk.

As a new form of sales enablement, MyGuide has accelerated the adoption of the Salesforce platform for all internal stakeholders, leading to productivity gains and an improved user experience. The dependence on other downstream systems was substantially decreased bringing down the total cost of ownership across the entire training ecosystem.

The MyGuide project for Salesforce has been a total success at Blue Shield of California. Thus, BSCA is already expanding MyGuide to be used in other applications.

Contact [sales@edcast.com](mailto:sales@edcast.com) or visit <https://www.edcast.com/> to learn more.

