

# Gould & Lamb Realize Significant Return from Siebel CRM Investment

## CRM project profile



### Challenge: Operational Systems Struggle to Keep Pace with Growing Company

Gould & Lamb (G&L) is the nation's largest and most trusted provider of Medicaid Set Aside (MSA) and Medicare Secondary Payer (MSP) Compliance Services in the United States. A majority of its service offerings involve the development of complex work files containing medical cost projections and assessments relating to insurance and legal claims. Throughout Gould & Lamb's first 8 years of existence, it maintained and manipulated case data and work products using a combination of disparate database software and documents stored on shared servers. These disparate legacy systems caused such significant inefficiencies related to case file completion, billing, reporting, and client servicing that G&L had to find a better solution.

### Implementation Drives Changes in Operational Processes

Gould & Lamb selected eVerge Group for the implementation of the Siebel 8.0 Financial Services (Vertical) application based on eVerge's qualifications and experience. At the outset of the project, eVerge Group recommended that Gould & Lamb take a fresh look at its core business processes in order to take full advantage of the Siebel CRM capabilities. Product and service processes were modeled in order to assess their relationships to determine the most efficient structure for providing service. From these process and service mappings, a relational database model was developed. The new design enabled all master customer data and work product information to be entered once, permitting multiple service offerings to be provisioned from the same master record. Operational processes (case file set up, work product development, billing, reporting and account research) were then refined to take advantage of this centralized repository of customer data and work product.

### System Supports Operational Efficiencies and New Revenue Opportunities

The Siebel CRM implementation has enabled Gould & Lamb to manage its business more efficiently, deliver a higher quality of service to its clients, and support incremental revenue generating services:

- New data structures have eliminated the need for re-keying duplicate data on account set-up
- Case files remain in one location, providing access to all departments for the work tasks to be performed and case status to be readily determined
- Billing is more timely and accurate since each department now enters its billing line items directly into an invoice record attached to the file
- Reporting is now more flexible, accurate and less resource-intensive due to a library of pre-defined core reports and an intuitive OBI EE layer that enables users to create their own reports using an intuitive user interface
- Case research is dramatically improved because cases in progress are maintained centrally in the Siebel database with information on completed tasks
- The CRM system enabled Gould & Lamb to launch a new line of business related to government reporting of Medicaid claims that is expected to generate an additional \$30 million in revenue per year

**Industry:** Insurance

**Oracle Platform:** OBI EE

**Oracle Applications:**  
Siebel Financials Vertical 8.0

### Success Metrics:

- 50% reduction of process coordinators
- Elimination of 3 positions in Records & Billing Department
- 50% increase in the production of the Data Entry Department
- 90% reduction in resources required to produce reports
- Elimination of 80 hours/month associated with researching archived cases
- \$30 million in additional revenue per year associated with the new service offering

### Client Feedback:

*"eVerge Group has been a tremendous partner and has been with us every step of the way. We couldn't have made a better choice in either the software or the implementation partner."*

**John Williams**, CEO and President



**eVerge Group**  
4965 Preston Park Blvd.  
Suite 700, Plano, TX 75093

972-608-1803  
888-548-1973 (Toll Free)  
www.evergroup.com

