

CASE STUDY

From CS to Sales: How Spring Health is Using Catalyst as a Single Source of Truth

150

EMPLOYEES

10

PERSON CS TEAM

50%

OF DEPARTMENTS
USING CATALYST

HIGHLIGHTS



Easier and less complicated to set up than competing platforms.



Catalyst adapted for use by other departments such as Sales, Operations, and Marketing.



Catalyst proven effective for forecasting renewals.

THE CHALLENGE

Create a Single Source of Truth That Benefits The Entire Organization

Spring Health is a mental health solution that helps employers modernize their behavioral health benefits. Since its founding in New York in 2016, Spring Health has grown to be one of the most effective health benefit providers in today's wellness marketplace. Spring Health's customer success team, known internally as Partnership Success, works primarily within HR and Benefits teams of the organizations they serve.

Before implementing Catalyst, Spring Health's partner data lacked a central location. The team had to reference Salesforce, Google Docs, spreadsheets, and various other documents in order to find the information they needed.

According to Aaron Tarver, Director of Member Marketing at Spring Health, "Information lived in so many different areas. It was very manual in terms of doing calculations or referencing different data points."

This caused a lot of inefficiencies for the Partnership Success team, who had to spend valuable time collecting data and calculating KPIs by hand. Spring Health knew this had to change, but they didn't want to deal with overly complex CS platforms that required a dedicated administrator.

Glen Tampke, Senior Director of Partnership Success for Spring Health, has been in that situation before. "I've been in organizations that have used Salesforce and Dynamics as CS platforms," he shared. "It's impossible to do anything in Dynamics without a dedicated technical lead. If you wanted to map a new field, someone else would have to do the backend work first. It's complicated and very limiting."

THE SOLUTION

Leverage Catalyst to Collect, Manage, and Distribute Valuable Customer Data

Spring Health invested in Catalyst to better manage data and workflows for their Success team, and found Catalyst to be much easier to set up and onboard - all without assigning a dedicated administrator.

"One of the easiest wins by far is the playbooks," Glen says. "It's been super helpful for getting tasks out to other teams." This is important because different pieces need to fall into place simultaneously when Spring Health is conducting an implementation or relaunch. Thanks to Catalyst, Glen is able to develop a consistent playbook for his team and watch the CSM work the tasks.

In addition, Spring Health is leveraging playbooks in Catalyst as a way to notify the CS team of upcoming renewals and operational relaunches in order to stay proactive. Glen has set up a workflow that ensures the CS team is notified 180 days ahead of renewal.

More broadly, Catalyst has become a staple in Spring Health's business, being used across executives and within teams like Data Science, the Clinical Team, Marketing, and Sales. "We have some specific customers that we like to keep track of," Glen says.

"And so I've been able to create dashboards for the executive team that allows them to see which stage of onboarding the clients are in and their respective statuses. I'm also able to show things like customer goals and marketing inventory."

But it's more than just visibility and reporting. One tangible example of how Glen's team is now better supporting their sales team is that Sales Reps are now using Catalyst to help populate RFPs. The team can confidently grab important customer stats from Catalyst, like how many customers Spring Health has in a specific vertical or with a specific broker, to share with prospects to help demonstrate their domain expertise.

“Catalyst has been really good to us. It’s helped us get off the ground and keeps us organized. The usability has been spectacular, and the customization is very deep. We are seeing efficiency gains top-down across the organization.

Glen Tampke

Senior Director of Partnership Success, Spring Health

WHAT’S COMING NEXT

Spring Health is looking forward to finding even more ways to use Catalyst. Glen is currently working on implementing success action plans within Catalyst that take advantage of subtasks and comments to facilitate action and collaboration.