

Streamlining EOB Production and Campaign Management for a Leading PBM

A major Pharmacy Benefit Management (PBM) company serving millions of customers across the United States faced mounting complexity in managing two critical areas of communication: Explanation of Benefits (EOB) statements and customer engagement campaigns. With multiple health plan clients, each with unique compliance requirements and branding standards, the PBM's legacy systems struggled to keep pace with increasing volume, regulatory changes, and digital transformation goals.

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A Prominent Healthcare Company

FOCUS

Streamline Production and Campaign Management

OUTCOME

Increased Efficiency, Cost Reduction, Improved Compliance

The Challenges

The PBM's EOB production and campaign management processes were siloed, outdated, and resource-intensive:

- **Highly Fragmented Template Library:** Each carrier required a separate EOB template with its own embedded logic and formatting, creating hundreds of variations to maintain.
- **Manual Update Processes:** Annual plan year changes triggered extensive template rework, often delaying launches and stretching internal teams thin.
- **Compliance Risks:** Delays or misalignments with regulatory updates risked non-compliance with CMS and other mandates.
- **Rigid Campaign Tools:** Their existing platform for engagement campaigns was inflexible, requiring users to adapt their workflow to the tool—rather than the other way around.

Together, these issues slowed delivery, increased cost, and hindered responsiveness to business and regulatory demands.

The Solution

O'Neil Digital Solutions implemented a dual-track transformation strategy, focused on both EOB modernization and campaign orchestration, using its configurable ONEsuite® platform.

EOB Transformation Highlights

- **Template Consolidation:** Reduced the number of EOB templates by 80% through modular, rule-free design.
- **Profile-Driven Business Logic:** Business rules were decoupled from templates and centralized in a dynamic, self-service database.
- **Empowered Business Users:** Enabled non-technical teams to make carrier-specific updates without IT intervention.
- **Compliance Assurance:** Built-in governance workflows ensured all updates were reviewable, trackable, and compliant with CMS timelines.

Campaign Management Evolution






- **Workflow-First Configuration:** ONEsuite was tailored to match the PBM’s internal approval, targeting, and delivery workflows—eliminating friction.
- **Faster Campaign Deployment:** Enabled the launch of new outreach efforts in days, not weeks.
- **Omnichannel Flexibility:** Supported campaigns across print, email, SMS, and digital, personalized to each member’s preference.

Business Impact

With O’Neil’s guidance and technology, the PBM transformed two of its most resource-heavy functions:

- **Streamlined Operations:** Simplified tools and templates, and automated workflows reduced system complexity.
- **Improved Productivity:** Freed IT and business teams to focus on strategy instead of firefighting updates.
- **Stronger Member Engagement:** Enhanced speed, personalization, and reach of communications.
- **Future-Ready Foundation:** Positioned the PBM for scalable growth in both EOB and marketing communications.

The Results

 Increased Efficiency	60% Reduction in effort required for annual EOB updates
 Streamlined Tools	80% Reduction in EOB template volume
 Improved Compliance	100% On-Time Compliance with government-mandated plan year changes
 Cost Reduction	Significant Reduction in development costs and operational overhead
 Faster Campaign Launches	Faster Engagement Campaigns with more precise member targeting and delivery

Conclusion

This partnership demonstrates the power of combining smart technology with strategic alignment. By leveraging O’Neil’s ONEsuite platform, the PBM eliminated bottlenecks, ensured compliance, and modernized how it communicates with millions of members—driving both cost savings and customer satisfaction in one unified solution.

Get In Touch

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