

Imagine360

Customer Success Case Study



Extending the Value of Proposal Generation with Experlogix Document Automation

Imagine360 is an employer health plan partner bringing about reimagined health care solutions. They aim to provide a better health plan experience for self-funded employers. With years of health plan experience for self-funded employers. With years of combined industry expertise and deep knowledge in reference-based pricing, its fully integrated solutions reduce costs, enhance transparency, and improve health outcomes.

Imagine360 delivers a flexible, service-oriented healthcare solution designed to provide high-quality care while driving substantial savings. With a strong focus on cost-effectiveness, Imagine360 uses Salesforce to manage complex services and client relationships efficiently.

They wanted a way to better communicate the opportunities they offered their clients and found it limited using Salesforce alone. They faced persistent challenges such as disconnected processes, lack of flexibility and relied on a patchwork of tools varying from added 3rd party software and manual Excel worksheets.

Product

- Experlogix Document Automation

Benefits

- Improved document accuracy and consistency
- Significant time savings for sales when generating proposals
- Extreme flexibility when creating proposals and other business documents

Tech

- Salesforce

Challenge

Their product offerings include both fixed-price and variable-price services. This created a need for more complexity than Salesforce alone could provide to generate a price sheet. They needed:

1. **Dynamic document sections based on pricing models**
2. **Custom calculations and conditional formatting**
3. **The ability to present different pricing splits internally vs. externally**

Employees used Excel-based pricing sheets to manually copy and paste data which became time-consuming, errorprone, and inconsistent. This caused delays in proposal delivery, longer sales cycles and hours building price sheets.

The team evaluated a few different 3rd party solutions but found a lot of them lacking in flexibility or too cumbersome to use. For example, Salesforce tools like Visualforce and Apex required heavy development effort and lacked the flexibility to handle complex layouts. Similarly, third-party tools like Conga and Tableau also fell short. Conga couldn't support horizontal layouts, and Tableau created disconnected, non-native processes. Without a standardized product catalog or scalable way to generate proposals, the team struggled to produce documents that reflected both fixed and variable pricing models.

"I'm very impressed with how flexible it is, anything from defining custom data sets, custom formulas, pseudo fields are very easy to do."

William Weihbrecht

Solution

Experlogix was already in use by another department, and its seamless (yet robust) integration with Salesforce made it a natural fit. The team began with a high-priority use case, automating the generation of sales proposals. They initially partnered with the Experlogix Professional Services team to build a process designed and authored in Microsoft Word, making it intuitive for business users while still offering technical depth behind the scenes.

Using Experlogix Document Automation, Imagine360 created:

A Complete Product Catalog in Salesforce, enabling the sales team to select standardized services.



A Dynamic Fact Sheet Generator, pulling in selected products from Salesforce and automatically formatting them based on billing model (fixed, variable, or wholesale).

Custom Templates with Conditional Logic: The team created proposals that displayed different sections based on service types, pricing models, or plan splits.

Advanced Custom Data Sets: For instance, internal revenue splits based on employee benefit preferences could be inverted dynamically when presenting to clients—tailoring messaging without altering core Salesforce data.

Fast, User-Friendly Workflows: Templates now generate polished proposals in under a minute, replacing hours of manual Excel work.

Result

Since implementing Experlogix, the company has seen a dramatic improvement in efficiency and document accuracy. Proposal creation, which once took hours using manual Excel processes, can now be completed in under a minute. Proposals with custom requirements are now 95–100% ready as opposed to being built from scratch and requiring little to no manual editing. The tool accommodates both fixed and variable pricing models with ease, supporting complex logic and dynamic formatting.

Sales and operations teams can now focus on understanding clients' needs rather than paperwork formatting constraints, while time-to-market for new document templates has significantly improved. With multiple successful projects already deployed and more in progress, Experlogix has become a core part of the company's document strategy, enabling scalable, flexible growth across departments.

Experlogix Document Automation has transformed how this insurance company handles document generation. By eliminating manual processes, enabling complex logic, and integrating seamlessly with Salesforce, Experlogix has become a cornerstone of their digital transformation strategy. With Experlogix in place, the team feels confident taking on increasingly complex business requests.

“We can solve our most complex business document requirements with Experlogix... We have freedom to walk into business meetings and just listen to them. They can tell us what they want, and we can show them on the spot.”

Greg Robinson

Senior Director, Enterprise Architecture and Development

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