

# CASE STUDY

## Castlight Health



## Why Castlight Chose Prialto

Castlight Health, like other fast growing public companies, lacked the time, expertise, and resources needed to build an administrative layer for their senior producers and client facing teams. When Castlight's head of sales operations first met with Prialto, only a couple of their highest-level executives -in a company of 200- had direct support from an executive assistant. Offsite regional sales vice presidents (RVPs) from Charlotte to Portland were managing teams of up to a dozen reps while also juggling basic administrative tasks such as scheduling, expense reports, booking travel, and updating their CRM. Castlight engaged with Prialto to create and manage an administrative support team for its RVPs.

## About Castlight Health

Castlight Health is changing the way people buy healthcare. With their online tool, employees of Castlight clients can easily see the cost and quality of a medical provider before getting treatment.



I initially expected the service to take substantial upfront time from me to get it working. But Prialto's service culture processes made it impressively turnkey.

-Seth Cohen, Regional Vice President



# PROJECTS

After surveying the Castlight team, Prialto customized an implementation plan that fit each RVP's workflow. Prialto coached them on easily adoptable time management and delegation techniques. These best practices showed them how to get maximum leverage from their Prialto assistants. This cleared the way for RVPs to quickly offload the following tasks.



## 1. Scheduling



## 2. Expense Management



## 3. Travel Management



## 4. CRM and Sales Support





## Scheduling

Scheduling was a tedious task for RVPs. Castlight worked with Prialto to implement a scheduling process that maximized each executive's time. With our assistants managing all schedules and email ping-pong, RVPs can focus on preparing for critical meetings. Prialto assistants relentlessly follow-up to ensure the right people are scheduled at the right time.



## EXPENSE MANAGEMENT

Before Prialto, RVPs were responsible for filing their own expense reports. With limited spare time, executives struggled to send accurate reports by the deadline. Our assistants now handle all expense management so all reports are filed on time, ensuring correct accounting, timely reimbursement and peace of mind.



## TRAVEL MANAGEMENT

Planning travel was tedious and time consuming for executives. The assistants learned the travel preferences of each RVP such as preferred airports, airlines, travel times, and hotels. Managing travel arrangements ensures executives get the most out of their business trips. Travel logistics are taken care of in a way that minimizes hassle, meets company guidelines, and deals with the cascading effects of any scheduling changes.



## SALESFORCE MANAGEMENT

Castlight's CRM is crucial to the sale's team success. Prialto assistants ensure all reports and data are upto- date for the team and management. The CRM data is now easy to access, updated in real time, and can quickly be displayed in relevant reports and dashboards. With the assistants managing their CRM platform, sales managers have increased visibility into their pipeline and workflows.

# KEYS TO SUCCESS

**Castlight Health is succeeding with Prialto because its stakeholders have committed to these best practices:**

- Provide clear guidelines of their processes and expectations to the assistant and the Prialto engagement manager
- Both teams regularly meet to review progress and to continuously optimize service
- Focus on getting the basics dialed in before offloading processes which may require more judgement and nuance from their assistants

## RESULTS

- Prialto's productivity delivers back to Castlight approximately 1200 hours of more value-added time which enables sales executives to increase sales conversations and drive growth.
- Each RVP's assistant completes all administrative work, so they can spend more time selling and managing their teams and less time managing logistics.
- The sales team leverages the up-to-date CRM data to better target prospects and nurture relationships.
- In addition to directly supporting each Castlight executive, Prialto collaborates internally to identify, document, and share best practices. Valuable processes implemented for one Castlight executive can be quickly replicated across the team, to ensure consistency.





## 100% On Time

Prialto ensures 100% of expense reports are submitted on time



## 17 Assistants

Castlight deploys 17 Assistants for Sales Ops support



## 1,200 Hours Saved

Castlight executives gain 1,200 hours of value-added time every month

