# Vitality

# Davies Consulting and CallMiner Partner to Automate Quality Assurance for VitalityHealth

**Case Study**

CallMiner + Davies

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Health insurer VitalityHealth has a team of more than 550 customer service advisors and manages over 1M calls a year – many of which are highly sensitive, focused on health and life cover and claims, so it's critical that VitalityHealth's advisors handle these calls correctly.

With a reputation for award-winning customer service to protect, VitalityHealth began to explore the possibility of introducing speech analytics to support quality assurance. It wanted a more reliable way to quality assure the high volume of calls, both in terms of compliance and the customer experience.

## The Challenges: Seeking an Alternative to Call Listening

VitalityHealth's quality assurance team is focused on ensuring a consistent, high quality performance from its customer service advisors. In the past, the large team had to spend considerable amounts of time listening back to call recordings to check whether advisors had asked all relevant questions and covered terms and conditions.

To transform the process and help use Quality Automation (QA) to actively enhance the customer experience, VitalityHealth wanted to introduce speech analytics software, so it could generate insights about advisor performance across more calls, more of the time.

## The solution: Managed analytics built on industry-leading platform

VitalityHealth selected Davies Consulting to help assess its requirements and business needs. In turn, Davies Consulting recommended CallMiner as the right solution for VitalityHealth. Through a combination of Davies Consulting's business consulting expertise and CallMiner Eureka, VitalityHealth was able to implement the industry's leading speech analytics solution with the managed analytics services the business demanded.

> "From our perspective, it's been a model managed service. We're benefiting from powerful speech analytics software, which enables us to conduct a straightforward comparison of what we expected advisors to say with what they actually said. The results are then displayed in the coaching system within 24 hours. We're able to call on Davies Consulting's experts to ensure it's delivering the insights we need."
>
> Simon Evans, Business Performance Director, VitalityHealth

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After implementation, the first task was to focus on quality assurance. Davies Consulting configured CallMiner Eureka to provide VitalityHealth with all the answers it needed. Every call is now recorded, transcribed and analysed for key terms that relate to the quality monitoring, with detailed reports being shared regularly with VitalityHealth to help it track quality against business targets.

As well as providing an overall picture of quality, the system supports individual learning and development. Where a call is flagged as raising potential concerns or uncertainties, the VitalityHealth quality team can listen back to the recording or check transcripts.

This is a far more targeted approach than previously used, freeing up the quality team to focus on other priorities within the organisation.

As Victoria Franz, Head of Quality & Efficiency at VitalityHealth notes, "It's more rewarding for the quality team and a far better use of their time."

Because 100% of calls are being analysed, the VitalityHealth quality team is able to consider the context of each advisor's wider work.  Calls are assessed in three areas: regulatory, which everybody in the industry is doing; service excellence, which is about tone, empathy and how the call was opened and closed; and process assurance.

The response of advisors has been extremely positive, as they recognise this as a more objective and constructive way of looking at their performance.

For VitalityHealth, this has two benefits. According to Lee Mostari, Director of Insights & Analytics at Davies Consulting, "Davies Consulting's input has meant VitalityHealth can now quantify advisor performance against a range of quality metrics, which provides the VitalityHealth team with a far richer understanding of the customer experience in real-time. What's more, VitalityHealth can then use the call data as the basis for highly focused individual coaching for advisors – which is far more effective, as it's personalised to them."

"VitalityHealth had very clear goals for this project – moving from manual to automated quality assurance, and using speech analytics as an effective coaching tool for individual advisor development. By bringing together CallMiner and Davies Consulting, VitalityHealth achieved the perfect solution.

The company is able to leverage CallMiner Eureka to improve its customer experience capabilities and increase compliance of core internal processes, while trusting Davies Consulting to take control of the deployment and management of the solution. This type of partnership is truly a win-win."

Frank Sherlock, VP International at CallMiner

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**An Award-Winning Combination**

Independent industry association, The Forum, selected Davies Consulting and VitalityHealth as winners of its Supplier & Client Partnership of the Year Award in 2020.

The project also won the 2020 Insurance Times Claims Excellence Award Claims Product Solution of the Year – Service Management.

One of the Judges commented:

> "VitalityHealth & Davies Consulting have demonstrated how proven, prior experience of implementing systems and processes, as a trusted partner, has delivered outstanding success for the client, in an area of application where many others have failed so far."

**Learn more about automating quality assurance in our whitepaper:**

[ **"Using Automated Scorecards to Improve Agent Performance"** → ]

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