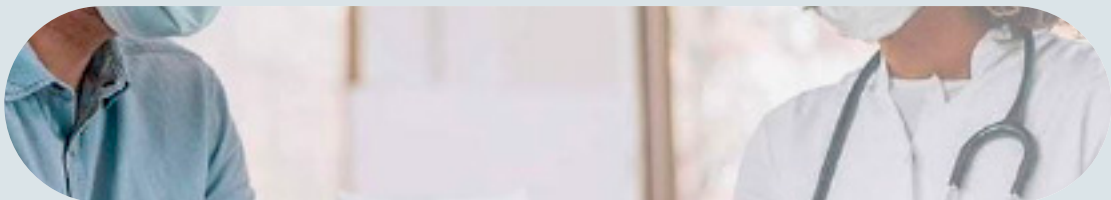
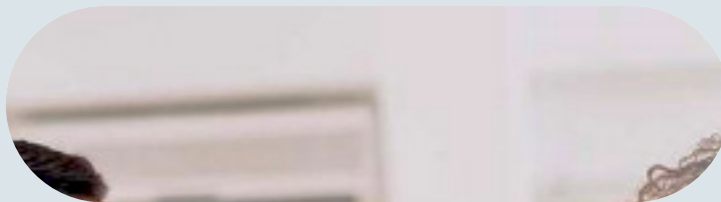




UPMC Improves Agent Coaching and the Bottom Line with Conversation Intelligence

Case Study



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UPMC Health Plan Case Study

A premier health system in Pittsburgh, Pennsylvania and renowned academic center with an international footprint, University of Pittsburgh Medical Center (UPMC) puts its member experience at the center of everything it does. The UPMC Health Plan offers a full range of products and services to more than four million members, with 560 concierges in Member Services serving them. The team leveraged conversation intelligence via CallMiner to deliver a world-class member experience, fostering a culture of commitment, accountability, and service excellence. By analyzing 100% of customer interactions, the team improved quality assurance (QA) efficiency and data-driven agent coaching, driving impressive bottom-line ROI results.

Challenges

Unscripted contact center struggled with manual QA

Prior to implementing conversation intelligence, the UPMC Health Plan Member Services team faced challenges in their manual QA process, but they were determined to overcome them and find effective solutions.

In the past, a small QA team would select 10 random calls each month, auditing introductions, closings, and key benefits for each call. This cumbersome, manual process was more of a checkbox exercise, and was frequently disconnected from the actual member experience. Without sampling 100% of member interactions, the team felt as if concierge reviews could be biased and inaccurate assessments.

"As an unscripted contact center, each concierge has a unique way of approaching things with members," said Cori Hoff, customer engagement manager at UPMC. "With more than 400 different call types, it was difficult for our small QA team to understand where our concierge team could use additional coaching or training, or how our member experience could be improved."

Industry

- Healthcare

Challenges

- Manual QA process
- Manual coaching opportunities

Solution

- CallMiner Analyze, Coach

Results

- Analyzed and scored 100% of member calls
- Proactive, personalized agent feedback
- Reduced help desk calls by 16%
- Realizing savings coming in up to 10% under budget
- Reduction in repeat calls

Limited coaching opportunities impacted member experience

The manual QA process limited concierges' coaching and training opportunities for improvement. While every concierge was provided with a weekly quality score, concierges did not have access to reporting that enabled them to compare their scores to peers. No coaching tips were available when reviewing their example calls, and there was no way to track or compare their quality scores over time.

The coaches also had a very manual process to identify areas of success and opportunities with concierges. Without better analytics capabilities based on a larger sample size of calls, coaches had little to work with in terms of data-driven feedback. In the absence of more regular scoring and feedback, agents were limited in their capacity for self-evaluation, as well.

Solution

Developing a World Class Call Score with CallMiner

UPMC adopted the CallMiner conversation intelligence platform to analyze and score 100% of member calls, instead of just a fraction of them. The team developed a 'World Class Call Score' that concierges received daily, instead of weekly, and measured them on key benchmarks including:

- Introduction – Did the concierge provide the appropriate greeting and take ownership of the call?
- Closing – Did the concierge summarize and end the call appropriately with the member?
- Empathy – Did the concierge create a connection with the member by responding to their experience?
- Appointment scheduling – Did the concierge attempt to schedule a provider appointment when the opportunity was presented?
- Web mentions – Did the concierge recommend self-service tools through the UPMC website or mobile app?

To roll out the World Class Call Score with concierges, the team focused on informative and lighthearted engagement strategies that included newsletters, contests, incentives and rewards. Examples included CallMiner Kentucky Derby and March Madness incentives. "We try to make it fun, and gamify their experience with CallMiner, while giving them tips and tricks on how to use the tool to their advantage," said Hoff. "Our strategy pulls in a lot of engagement, and makes our concierges laugh and have fun."

Results

Taking coaching to the next level

Using insights from the World Class Call Score, UPMC coaches now have more access to data to identify areas of opportunity and success. The implementation of the CallMiner system has proven invaluable for the UPMC team, enabling them to uncover insightful trends that might have previously gone unnoticed. This includes identifying instances of proactive call handling, which empowers the team to take appropriate action and enhance overall customer experience.

"We used silence times combined with transfer reports as indicators that concierges were transferring calls to the county assistance office and remaining on the line, instead of getting on another call," said Hoff. "By focusing on behaviors and patterns like this, the analyst team can send over specialized coaching recommendations to managers and address these issues before they impact the member experience."

Beyond coach-to-concierge interactions, each line of business uses reports from CallMiner to understand both positive trends and areas for improvement. The reports help engage the larger team around action plans to improve the member experience. For example, if a team member proposes a refresher training, analysts can measure the impact of the training in CallMiner and suggest areas for improvement.

"CallMiner has helped improve the coaching experience overall because it now gives us a wider range of how a team member is doing," said Kristen Hess, staff development coach at UPMC. "Previously, we would only be able to see 3-5 calls, and have to assume the majority of the rep's calls were along the same lines. Now, we're able to see a majority of the rep's calls and get a much clearer picture of the rep's world class service. The transcripts help to quickly identify issues within the call, instead of having to go back and replay a section over again. This helps us to provide more consistent and effective feedback to the team, which in turn provides a better rep and member experience."

Inspiring a culture of continuous improvement

The UPMC team hasn't rested on the initial success of its World Class Call Score. It's important to enable both coaches and concierges to weigh in on the scoring methodology and suggest improvements. As an unscripted call center, this feedback loop is especially important. Concierges have a voice as to how their calls are scored, and can personalize the system's syntax to their call flow.

In addition to concierge feedback, coaches listen to calls and complete requests for review if they see a category that isn't accurate. In 2022 alone, 200 categories were added to CallMiner, and 3000 categories were edited since they were created. The World Class Call Score has been edited 76 times, emphasizing the importance of listening to employees and customers alike.

Driving cost-savings ROI and member experience improvements

After the implementation of conversation intelligence, UPMC has been better able to anticipate members' needs to achieve first call resolution (FCR). The team has successfully enhanced member experience by implementing coaching-based action plans aimed at minimizing member dissatisfaction.

This proactive approach has proven highly effective in identifying and addressing areas of concern, leading to greater member satisfaction and overall improvement in the quality of service provided. In addition, increasing their QA coverage to 100% of calls has ensured compliance in external audits, and driven operational efficiency.

"We have been able to improve certain processes, including streamlining prior authorizations," said Hoff. "After seeing call data trending in CallMiner, we established a new process where physician account executives reached out to providers to educate them on when and how to send in prior authorizations. That change resulted in significant improvements, which reduced the number of repeat callers."

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In addition to improving the member experience and streamlining inefficiencies, the team has experienced significant cost savings and ROI benchmarks. In 2022, the Member Services team:

- Increased appointment scheduling numbers by 200%, by measuring opportunities for when concierges should be offering to schedule
- Realizing savings coming in up to 10% under budget
- Reduction in repeat calls
- Reduced call volume by 187,470 calls
- Reduced calls into help desk for concierges by 16%

In the future, the team plans to expand its use of CallMiner to collect even better data and further enhance the member experience. As a part of this effort, the team plans to share insights with other departments to drive business improvements, and further engage with healthcare providers.

"Our marketing team recently asked for information on LGBTQ+ calls we've taken to learn about proper terminology, procedures, and more," said Hoff. "The marketing team can leverage insights from real customer interactions to develop the best materials, demonstrating empathy and highlighting the resources and information we have for that community."

The same processes are being used to develop campaigns to ensure people get their flu shots. "These types of campaigns not only reduce calls, but help our members be healthier. It's important to us that UPMC is seen as their Partner in Care."

To learn more about CallMiner:

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