CX Best Practice Award Winner

Award for Standard Operating Procedures: PerformRx

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2016 CX Best Practice Success Story – Standard Operating Procedures

Company Description

PerformRx is a pharmacy benefit manager dedicated to clinical culture, boutique services and holistic solutions. We provide high-quality, cost-effective pharmaceutical services for positive health and financial outcomes

PerformRx Contact Center Description

Call Types

Billing, claims, and pharmacy benefit inquiries from Providers, Prescribers, Pharmacies, and Members

Customer Types

Providing a range of pharmacy services for multiple clients with Medicare, Medicaid, and Commercial members

CSR Headcount

96 CSRs

Contact Channels

Primarily inbound in addition to outbound phone calls, email, website, IVR

Hours of Operation

7 days per week, 24/7, 365 days

Contact Volume

We are on target to handle over a million calls this year

Increasing Quality and the Customer Experience through the Documentation of Standard Operating Procedures

Background

Throughout 2016, the PerformRx Operations Quality Program has been able to measure the effectiveness of certain practices on customer satisfaction (Csat), first-call resolution (FCR), and the call handling quality performance of our associates. These measurements were made possible by using Voice of the Customer (VoC) data from SQM and our own quality performance data. Our success with measurement has led to an increase in best practices and an expansion and refinement of our Standard Operating Procedures (SOPs). In addition, our success has allowed us to diversify and increase our book of business while efficiently and reliably standardizing our SOPs and the flow of information. This flow reaches from our associates all the way out to our external clients.

Opportunity Statement

During 2016, the PerformRx portfolio of clients expanded greatly. As a result, our company needed to solve the problem of how to manage this growth while maintaining the same number of associates in the call center. Often, when implementing a new product, there are many logistics which need to be managed for our clients. For example, it may be necessary for a client's relationship manager to have access to their scope of services and policies that they have agreed to with us. Furthermore, when new federal regulations arise, it may be necessary for account management to modify existing practices and procedures to comply with government mandates. Lastly, changes to policies or procedures must be communicated down to the operations team and the front-line associates (who are the face of the company and are relied upon to interface and educate the customers and providers calling to the plan).

QA Program Highlights

Auditing: For associate and LOB audits: Members of the QA Program Team will audit a minimum of four (4) interactions for each associate on the CCC. The team will also audit ten (10) interactions for each line of business (LOB).

Coaching: QA analysts send coaching sessions and immediate actions to Customer Care Center supervisors and Managers. In addition, the QA Analysts work closely with all new hires after orientation to ensure that their instruction is as comprehensive and efficient as possible.

Reporting: Monthly Associate Quality - Monthly Client Quality - Monthly Associate Trends - Monthly Call Grade Analysis - Quarterly Awards Recipients - Quarterly SQM QMC

Best Practices Used

To rise to this challenge, we have been developing our SOP Standardization and Expansion Program since the beginning of 2015. Initially, our SOPs were developed for our Medicare Clients in response to federal regulations which resulted in heavy financial penalties if we were non-compliant. As we added clients outside of Medicare, we had to create new SOPs to deliver PBM services to companies with different requirements and less stringent regulations. To date, we have expanded to 23 clients, providing a range of pharmacy services for Medicare, Medicaid, and Commercial members. Our clients have access to their plan specific SOPs via SharePoint so that they can have immediate self-service access to sign-off on policies.

We also developed leadership (high-level) SOPs such as contingency plans in the event of natural disasters, and role-based (lower-level) SOPs for placing an associate on a performance improvement program. These operational SOPs are easily accessible in PerformHelp, an easy to access web-portal that is available to all PerformRx associates. These SOPs include the necessary day-to-day procedures and scripts that are used by our associates in every interaction. They range from call quality monitoring, new-hire training procedures, cross-training procedures, escalations and downtime scenarios, to various greeting and closing scripts, and coaching and appeals. Furthermore, these SOPs are reviewed by a special committee on a regular basis to ensure that the information contained is always relevant.

- Customer Care Updates
- Reference Guides
- Employee Resources
- Formulary Navigator
- PerformPA
- Quick Links
- Desktop Policies
- Customer Care Center Leadership Portal
- Account Management Portal
- Policies and Procedures

Customer Care Center Desktop Policies

Desktop Number	Topic
234.001	Quality Assurance Program
234.002	Quality Program - Appeals
234.003	Line of Business - New Hire Training
234.004	Total Call Recording
234.005	Caller Opt-Out - Total Recording
234.006	Helpdesk Escalation
234.007	Language Line Services
234.008	Request Paid-Time Off
234.009	Downtime Procedures and Scripting
234.010	Clinical After-Hours Procedure
234.011	Fax Back Self-Service
234.012	Hold Scripting Policy
234.013	Call Transfer Protocol and Scripting
234.014	Call Documentation Protocol
234.015	On-Call Supervisor Policy
234.016	Knowledge Tool Review
234.017	Standard Call Greeting and Verification
234.018	Password Reset Assistance
234.019	Verint Self-Service - Associates
234.020	Telephone AUX Codes
234.021	EXP Resolution
234.022	Procedural Compliance
234.023	Listening for Understanding
234.024	Standard Complaint Process
234.025	Escalated Call Process
234.026	Certification/Recertification Policy
234.027	Employee Feedback
234.028	Inappropriate Incoming Call
234.029	Disconnected Call
234.207	Coaching Sessions

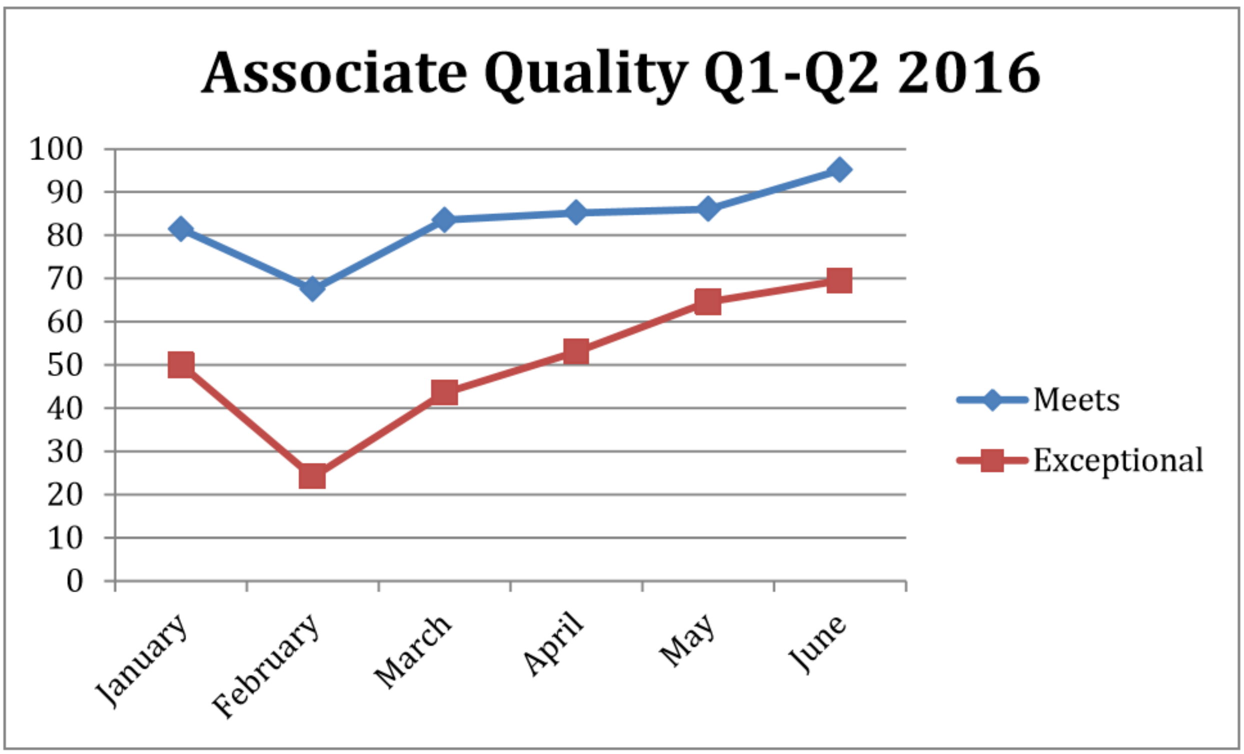
Shown above: A snapshot of the SOPs listed in PerformHelp

FCR/Csat Outcome

As of 2016, many of the procedures have been updated to include Visio workflows for our more visually-inclined associates. Feedback from our associates has been positive thus far.

As stated by an associate in our Jacksonville office, Kaitlyn Zeoli-Doyle says, “I rely on PerformHelp for my day-to-day work because it provides me up-to-date information such as formulary updates which provide me with quick access to the latest information to help each and every caller! I check for updates at the beginning of my shift daily and sometimes more if I have downtime.”

The success of the SOP Standardization and Expansion Program has been quantified as well. Our VoC data shows a 2% increase in both FCR and WCC Calls along with a 3% increase in Call Center Csat and CSR Csat from 2015 through Q2 of 2016. Additionally, Action Alerts over the same period decreased by 1%.



The results of VoC surveys also positively correlate with our quality performance data gathered from our quality reporting tool, Verint QA. From January 2016 to May 2016, the percentage of associates who met our minimum standard of quality increased from 81.43% to 95.12%. Additionally, the percentage of associates rated as 'exceptional' increased from 50.00% to 69.51% over the same period. This was best exemplified by the increase of "World Class" awards given to PerformRx associates during 2016 (six associates in Q1 vs. twenty-two in Q2).

Member Survey 2016	YTD 2015	Q1 2016	Q2 2016	Year-to-Date
Sample Size	5768	1476	1111	2587
Customer Overall Satisfaction	74%	77%	79%	79%
First Call Resolution	61%	64%	66%	65%
Calls Resolved	81%	82%	84%	83%
World Class Calls %	67%	70%	71%	71%
Action Alert %	12%	10%	9%	10%