

CX Best Practice Success Story - Desktop Application

Regence Blue Cross and Blue Shield Plans (Idaho, Oregon, Utah & select counties of Washington State)

Company Description

Cambia Health Solutions is dedicated to transforming health care. We are a family of over 20 companies working together to make the health care system more economically sustainable and efficient for people and their families. Our solutions empower more than 70 million Americans nationwide.

Cambia has six health plans in four states in the Pacific Northwest that provide insurance to more than 2 million people with a top rating in FCR in the BlueCross BlueShield Association. Through bold thinking and innovative technology, Cambia delivers solutions that make high-quality health care more available, affordable, and personally relevant for people.

Holistic Member View Overview

Our call center is committed to creating a relevant, customized experience and empowering our employees to anticipate the needs of their callers. We recognized it wasn't enough to deliver a robust training and intensive coaching but that there needed to be a better solution for our CSRs to make their job easier; that's when we created an innovative solution using data, technology, CSR expertise, and products to transform how we serve our members. The work began in 2015, to pilot how to offer relevant and beneficial products and services to impact consumer health and well-being positively. In 2016, we launched the pilot and a new tool with 30 CSRs, who provided feedback for refinements. Through the course of the pilot, we learned that CSRs could effectively introduce solutions to members if there is something that prompts them to educate a member, we also learned that members are interested in using these solutions because more than 37% were unaware the solutions existed. Additionally, we learned that by letting the CSRs follow member queues that the member's reactions to these offerings would be overwhelmingly positive, and less than 2% declined receiving information. In 2017, we rolled out a desktop web application, Holistic Member View, to our call centers for all lines of business.

Holistic Member View is a unified desktop that displays member information based on the CSR's call flow and the data necessary to quickly and efficiently serve their caller. The tool brings multiple data sources into one screen to reduce the number of applications a CSR must access to answer member questions and puts relevant links and information right at their fingertips.

Member Details | Medical, Dental, Vision Claims | Pharmacy Claims | Spend Summary | Premiums | Diagnosis and Procedure Details | Pharmacy

Member Details

Input Parameters

Enter Subscriber ID
Select Member Suffix

Family Details

Group Name
Group Number
Primary Home Address
Home Phone
Primary Email

Members

Suffix	First Name	Date of Birth	Relationship	Sex	Age
0		1	M	M	53
1		4	W	F	53
2		1	D	F	20
3		1	D	F	19

Broker Information

Current Products and Effective Dates for selected member - OED: 1/1/2017

Member Name	Plan Description	Product ID	Effective Dt	Termination Dt	
Y SMITH	Medical PPO Plan 3	UMU29039	1/1/2017	12/31/2199	Hover for Plan Details

Additional Programs

Joint Administration Third Party Administrator

Recent Calls (rolling 6 months)

Previous Survey Results

Click to Collapse Links

[KITT: CLICK HERE](#)
 [Code Finder: CLICK HERE](#)
 [AIM/RQI: CLICK HERE](#)
 [Evicore: CLICK HERE](#)
 [Letter Writing Reference and Forms: CLICK HERE](#)
 [Resource Desk Survey: CLICK HERE](#)
[Corporate Websites: CLICK HERE](#)
 [Clinical Care Advance: CLICK HERE](#)
 [CSR Admin tool : CLICK HERE](#)
 [Privacy Tool: CLICK HERE](#)
 [WFM Web Suite: CLICK HERE](#)
[National Provider Search: CLICK HERE](#)
 [SSRS Member Tax Report: CLICK HERE](#)
 [Submit Feedback on Cross-Serve: CLICK HERE](#)
 [Credits & Thanks: CLICK HERE](#)

Cross-Serve Opportunities

Click On Buttons to Go to Surveys. Remember to record a 'Did Not Promote' or Survey for every call!

Did Not Promote 🌟

Factory Opportunities

- DMAC 🟢
- LASIK ▲
- Vision 🟢
- Hearing 🟢
- Weight Management ▲
- Healthy Meals ▲
- Lab (Only) Opportunities
- PBM ▲

Click To Launch:

[CBC](#) [CambiaDOCs](#)

Legend:

- 🟢 = Go
- 🟡 = Already Cross-Served
- 🟠 = Go App Promotion
- ▲ = NO Opportunity
- 👉 = Hover for Info
- 🛑 = STOP!

PBM LAB OUTCOMES SURVEY

User ID: r613368 Member ID: Suffix: 1

On January 1st, Alliance RX Walgreens Prime will be our new mail order and specialty pharmacy service provider. If you use these services, we'll be sending you information in the coming months to help you make the transition.

If you'd like to talk with someone about these changes right away, I am happy to get our pharmacy team on the line.

PBM Contact: 1

What action took place?

Provided Information over the Phone

Transferred to PBM

Member Declined

How would you rate the member's response to receiving the campaign? (if negative, please use comments field)

Positive Negative Neutral

Do you have any additional comments?

[Submit and Reset](#)

HMV is a tool for our CSRs, designed by our CSRs. During several months, a team worked to gather CSR feedback through focus groups, surveys, user acceptance testing, and demonstrations to improve and enhance the tool to customize it based on CSR needs. Because of the unique construction of HMV, using Tableau, APIs, and best web practices, we quickly went from idea to application in a few weeks. CSRs were encouraged to submit ideas and feedback regularly. A team was created to support the tool, resolve CSR inquiries, review content usage, and implement enhancements. The support team includes operations leadership, training, knowledge management supervisors, analysts, and a specialized technical team. Every week, the support team reviews, acknowledges, vets, and prioritizes every submission submitted by the CSRs to plan upcoming work each week. Enhancements and new offerings are released every two weeks, driving the tool's continuous evolution. Additionally, our content developers use a standardized support application to resolve issues quickly.

The tool shows insights that predict the likelihood that a member will be interested in a campaign, product or service, or anticipate issues members may call on later such as an out of network claim or a letter that requires the member to act. This insight is customized to each member using demographics, claims data, propensity models, business rules, and their technology utilization; the tool indicates to the CSR when to bring up a particular campaign to a caller. The indicators display green to pitch, yellow to indicate that we've already had a conversation, or red indicating that the member is not interested. Thus, we can

further personalize our conversations because the next CSR who helps the member knows about past interactions and how receptive a caller might be to hearing future pitches. The CSR completes a brief survey to capture the member's reaction to the information to help us improve future campaigns.

The tool also displays everything the CSR needs to confidently pitch a campaign, including how to bring up the product or service in the conversation, important details about the program, phone numbers, and links to additional resources relative to the topic.

Each campaign that is launched is closely monitored through focus groups and surveys during the pilot phase to gather CSR feedback regarding training, the tool, employee satisfaction, and change management. After the initial HMV rollout, 85% of CSRs have indicated that the program has had positive or no impact on their job satisfaction as an employee. The team went to work to understand how to improve the tool further to impact CSR job satisfaction positively and have had great success implementing changes and letting their voices be heard.

The tool has made us more effective, allowing us to accelerate mobile application adoption, PCP selection, and electronic documentation enrollment by 16% which exceeds that of other customer engagement channels. The tool also has allowed us to pilot products and present members options, which enables our CSR to change the conversation from, "No, I cannot help you," to, "There is something additional that might be of value."

Each campaign we offer focuses on providing members value, and the tool helps us do that. We added a tax-reporting component to the tool, reducing CSR work time by more than 10 minutes per request and saving \$53,000 annually. Customers who take advantage of our discount program – also among the campaigns we offer – save \$299 on average, and those who use our convenient care solutions save \$103 on average per visit.

Since the implementation of the Holistic Member View tool we've seen improvements with our scores, member satisfaction has increased 1-3% from the same period in 2016, Resolution 1-2% increase, and First Contact Resolution 1-5% higher.

Summary

Today, thanks to the Holistic Member View tool, we've personalized more than 24,000 conversations with members. We've created teams to test and refine offerings, ensuring member communications are positive and of value. We've built Holistic Member View in a way that increased CSR efficiency by reducing the places CSRs must search for information, allowing them to focus more on the member through more customized interactions and increase customer satisfaction, resolution, and first contact resolution.

Appendix: Member Feedback

"I needed help regarding a payment issue. I just spoke with one of your great people. I wanted you to know how great she is, so patient. She talked slowly, clearly, and concise. She answered all my questions and then while we waited to get back in, she gave me great information that I didn't know, about what's available on the site like discounts and programs that I wasn't aware of. I just wanted to say how GREAT she is; I give her 5 stars."

"The customer service rep who helped me was very friendly, very knowledgeable. She took the time to explain it, where it was on the website, step by step, click here, click there, which was very helpful. Then like I said, she gave me her fax number so I can fax it directly to her because she was familiar with the issue so she could resolve it, take care of it. Which was super helpful and she was very friendly, courteous, and just awesome. She needs a raise because she was that good. That's one person you need to keep on staff because she was so good, her customer service was excellent, she was friendly, she was kind, and just very caring toward my issue."

Appendix: Employee Feedback

"Many members love the idea of the discount program and are excited to use them!"

"The members all so far love the idea of the advantage discount program, and it's easy to promote to the members."

"The member called in for diabetic education benefits. I referenced the website and mobile app, then tied in healthy meals advantages since she was a Type 1 diabetic, and explained we offered discounted programs for healthier eating. She thanked me because she needs all the information she can get."

"I had a wife calling in for her husband who needed a hearing aid. She was so stressed because they cost so much, I asked if she or her husband were registered on the website and they weren't. I helped her register and then showed her our Advantage Discounts and went over the hearing aid information. She was pretty excited at how much she could save - almost \$900. She was grateful I shared them with her and ended the call smiling."

"Thank you so much for looking into my suggestion and getting back so quickly. I love how my feedback was validated. I will definitely be open to sending additional ideas."

"I LOVE the new search option. It has cut down time for me getting the tool up and going and has made it easier for me to remember to cross serve every member."

"I really like that the product ID is available for us in the tool."

"I really like having the CBC button on the screen, and I really like having all the links at the bottom of the page."

"...the new tool is awesome!"

"Love this tool and how everything is in one place."

"I like the new format. I like how everything is right there under links and just pulls up, and you are exactly where you need to be."

"I love to inform members of additional services when it applies."

"It is much easier to access needed info!"

"Definitely a plus for members; it is nice to be able to offer a positive when their plan does not cover something."