

Contact Center FCR Best Practice Award Winner

Award for Escalation CSR Support: Blue Shield Blue Cross of Massachusetts

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Escalation CSR Support – Best Practice Success Story



MASSACHUSETTS

Company Description

Blue Cross Blue Shield of Massachusetts is a community-focused, tax-paying, not-for-profit health plan headquartered in Boston. We are committed to working with others in a spirit of shared responsibility to make quality health care affordable. Consistent with our corporate promise to always put our members first, we are rated among the nation's best health plans for member satisfaction and quality.

Blue Cross Blue Shield of Massachusetts Contact Center Description

Locations

Quincy, Massachusetts, USA

Hingham, Massachusetts, USA

Call Types

Calls from Members inquiring about their benefits, claims, and eligibility

Customer Types

Members enrolled as individuals or part of a group plan

CSR Headcount

233 CSRs

Contact Channels

Inbound and outbound phone calls, email, IVR, website, and social media

Operating Hours

Monday to Friday, 8:00 am to 9:00 pm

Contact Volume

Approximately 140,000 calls per month on our Member Service lines

Problem/Opportunity

Toward the end of 2013, the Member Service Department was faced with several challenges inhibiting our ability to improve First Call Resolution (FCR) results. Our managers were responsible for leading teams of 30 plus individuals with one supervisor to assist them. At the

same time, we were right-sizing our staff which lead to the constant addition of new team members. All told, we added 157 new Customer Service Representatives from the 4th quarter of 2013 through the 3rd quarter of 2014. Increasingly, our leaders found themselves with major responsibilities to not only manage the day-to-day operations of the team, but to find ways to support and to develop team members. We had an internal hotline that served as a Q and A resource, but it was staffed by a small number of Business Experts (BE) that could not keep up with the volume of questions they were receiving. To offset the hotline staffing shortfall, we were forced to use our supervisors on a daily basis which took away from their ability to complete their own tasks and placed additional stress on their managers. It was clear we needed to find a solution. To address the situation, we assembled a project team and charged them with the following goals:

- Re-name and re-brand the hotline
- Determine appropriate staffing levels
- Build a methodology for data collection and analysis
- Determine how data collected on the hotline could be used to inform decisions and improve education
- Redefine the roles and responsibilities of the Business Expert
- Rewrite the BE job description to match those changes
- Develop a progression model to include the BE role on the path to leadership
- Develop a hiring strategy and bring on the right people to make it all work
- Communicate the new strategy to the service center
- Implement all changes to improve FCR and CSAT

Re-Name and Re-Brand

The result of our work has radically changed the efficiency of our service center and the way in which we share information. The rebranded hotline was renamed, “The Service Solutions Line” or SSL.

Thanks to an in-depth collaboration and staff model analysis with our Workforce Planning Team, we determined the need was 19 BEs; a number that we planned to augment with top tier representatives. Equally as important was the development of our SSL Tracking Tool; an internally built application that allows us to track which CSRs called and why, allowing us to quickly identify training opportunities at both the individual CSR and department levels. The reporting created by the database helps us improve efficiency, quality, and FCR in our service

center. Our Service Solutions line reports to the Multi-Channel Team within our customer service center. This structure allows the BEs to remain objective as leaders and retains their status as a part of the department as well. The basic concept of our Service Solutions Line is two-fold:

1. Behave like a miniature call-center unto ourselves in which the telephone representatives are our customers.
2. Collect data and use it to inform trainings both at the aggregate level and at the individual level. Every time someone calls us they are volunteering their problems, concerns, questions, strengths and opportunities.

In other words, we will make use of every interaction to improve the confidence level of our most important resource: our front line Customer Service Representatives (CSRs). Out of this concept was born, the monthly BEat. The BEat is a monthly newsletter produced by the BEs and based entirely on trends captured on the SSL. Many CSRs say they refer to it often when they are stuck on a call. The BEat is written in an entertaining way and has served as a great source of timely and relevant information for our department. It has also helped to solidify the brand of the Service Solutions Line as a helpful group of leaders whose goal it is to spread knowledge, encouragement, and fun throughout the department.

The Role of the Business Expert

We wanted our team to be viewed in the same way that captains are viewed on a sports team. They should be part leader, part coach, part team member; that is exactly what we have achieved. Each BE is assigned to a team so that they can bring reporting and SSL insight to the leaders of that particular team. Above all, they support our service center quickly and efficiently on the Service Solutions Line, always taking the time to identify coaching opportunities in real time and when reviewing SSL data.

Our BEs also handle all escalated member calls. To ensure that they are properly equipped to handle escalated issues, we provide our BEs with advanced claims adjustment training, have an open team group chat so that they can tap their fellow leaders for support, and have given them the power to override and pay pharmacy claims to help members that have encountered some difficulty filling a script, and that need assistance quickly. The expertise of the BEs has proven to be an asset when handling these escalated issues as they have significantly improved our

ability to resolve member complaints and clear roadblocks in real time. The process also helps us identify and address opportunities to positively impact FCR.

How It All Works

CSRs can reach the SSL by calling in and selecting the prompt for the type of team that they are on. Once on the line, BEs will use a variety of methods to help the CSR including screen sharing and even instant messaging after the call is over to provide a bit of extra help. In addition to this, the BE has the ability to take the call over. Any call that is taken over, whether it is an escalated request for a supervisor or otherwise, is warm transferred from the CSR to the BE. Moreover, any call that is taken on by the BE is owned by that BE from that point on; any research and follow up needed to arrive at a resolution is their responsibility once the call is transferred.

BEs are stationed both in a central group in our call center as well as a part of our remote workforce. This allows the team to work closely together while remaining relatable to both office based and remote CSRs.

Data Collection and Analysis: How We Use What We Learn

We have a rule on the SSL: Track every interaction. We adhere to this rule because we understand that integrity of our data is the foundation that allows us to build upward. We have several levels of reporting and analysis. These reports help to show trends for the previous month, overall numbers, areas of challenge, and training and coaching opportunities at the aggregate level, team by team and even down to the individual CSR.

The BEs themselves develop much more personalized and team tailored reporting for the leaders of the teams for which they are assigned. This reporting is generated weekly and supplies leaders with a snapshot of the types of issues prompting questions within their teams. While we do track the usage, trends, and even behaviors of the CSRs calling in, we do not hold that information against them, nor does it have a negative impact on their metric goals.

At every level, we are using the information gathered on the SSL to identify trends and coaching opportunities. This supports our mission to empower our service center staff by sharing knowledge and building confidence. It is our goal to use hard data to get out in front of those

challenges and to give our representatives the tools and the confidence they need to get the job done.

Our Progression Model: Preparing Future Business Experts and Leaders

In an effort to cultivate not only a backup support system for the Service Solutions Line, but to create an opportunity for development for our CSRs as well, we have identified a group of CSRs who can assist the SSL during busy times. These CSRs must consistently meet all metric goals, display an affinity for coaching their peers, and possess a high level of aptitude when it comes to BE skills. These CSRs must be highly recommended by their leaders and are fully prepared for the opportunity ultimately making this seamless to those who call into the SSL for support.

The metric goals that our CSRs strive to achieve include standard statistics like AHT and Calls per Day blended with SQM scores that capture the voice of the member; all of which support our efforts to be a World Class service center.

When it comes to our BEs, we often provide them with the opportunity to step in for Supervisors when they are on vacation or filling in for their own leaders. As people in the leadership chain move up to fill other roles, our BEs slide into these open roles on an acting basis, until the positions can be filled permanently. This model helps to fill roles in times of attrition and serves to prepare new leaders as they further their careers.

Eight Months Later

Rarely do we need help from Supervisors and Managers to support the Service Solutions Line, which is in stark contrast to the many hours per day that they used to spend taking Q and A calls. This has been a major victory as it has returned these leaders to their proper roles.

To backfill those BEs in an acting supervisor role, we have brought in several telephone representatives who have taken month long rotations supporting the SSL.

In an effort to keep FCR top of mind with our CSRs, our BEs have also been using each Q and A interaction to identify opportunities for FCR and to coach our team members to do the same. Our BEs created a list of the 10, pre-determined opportunities for FCR that our representatives had to identify on their calls and report to the SSL. We awarded 5 prizes to the winner from each of our 5 team types. It was a great opportunity to again reinforce the importance of FCR through a fun interactive exercise.

Year 2: How We Have Grown

Our team is now an integral part of our service model and continues to help associates grow and develop. Whether calling into the line for help, or sitting side by side for a coaching session, our team members are learning from their Business Experts all day, every day. To further promote associate education and development, we began our Backup BE program, which allows associates to sit with BEs and take calls on the SSL. They are given the chance to try their hand at fielding questions from their peers and learn helpful research and navigation tips from the experts.

Another major impact the SSL had on the department in 2015 was our Claims Refresher Training. We pulled a large amount of associate call data and used it to identify a number of training gaps. Nearly all of the associates selected to participate in the training showed major improvements in their confidence and understanding of how claims process and how to handle member inquiries. This training is now a part of the new hire curriculum as well.

Our Business Experts have also started to expand their own roles. Many of them are helping to manage a variety of service channels, including email and social media. When it comes to email, our Business Experts help to lead our CSRs and handle most of the quality checking work. Moreover, they played a big part in the development of our new plain language template library, which has helped to speed up our response time and improve quality overall.

Finally, a major change in 2015 was the addition of the SSL call quality program. We are now recording internal support queue calls and have designed a quality program to score those interactions. Our goal here is to ensure that our support line is performing at the highest level possible.

FCR/Csat Outcome

The development of our Service Solutions Line has dramatically impacted the landscape of our service center in a positive way. We have become not only an invaluable, efficient, and knowledgeable resource for our team members, but a development area for future leaders as well. We are extremely proud of what our team has accomplished in a short period, and we look forward to cultivating our hotline model to even more innovative levels in the future.

