

INNOVEER SOLUTIONS

Customer Success Story — Call Center Effectiveness

COMPANY OVERVIEW

Group Health, Inc. (GHI) is the largest not-for-profit health services corporation in New York State. Headquartered in New York City with offices in Albany, Buffalo, Rochester, and Syracuse, GHI serves 2.6 million customers and employs more than 2,000 people. GHI offers access to one of the largest panels of participating providers in New York State, and supplies an array of health insurance plans and third-party administrative services for groups and individual subscribers. As one of the top 20 largest insurers in the nation, GHI has an impressive 97 percent member retention rate.

THE CHALLENGE

GHI recognized that without renewed emphasis on service and related internal efficiencies, its business could be hampered by the government regulations, fierce competition, and high customer turnover plaguing other insurers. The company decided to replace its multiple, outdated legacy systems used for tracking customers, providers, call center representatives, and agents with a new system that could manage all information in a central database, thereby enhancing its well-known commitment to customer care. Innoveer Solutions, with its extensive CRM expertise and experience in the health insurance sec-

tor, was a perfect partner to develop, deploy, and support GHI's CRM solution.

THE SOLUTION

Innoveer Solutions began the project by converting data from GHI's multiple legacy systems to allow successful management of relationships throughout the entire customer life cycle and across all customer touch-points. Group, broker, sales representative, and plan information is now centrally located and easily accessible. Innoveer then focused on adding functionality to maximize the effectiveness of GHI's sales force. This functionality included contact, activity, opportunity, and correspondence management.

Innoveer Solutions consolidated information from legacy databases and individual management tools into a centralized data repository for all contacts, clients, and leads. Information now flows seamlessly from sales representatives to account managers. Previously, account managers, who are responsible for cross-selling and up-selling, had to e-mail or phone sales representatives to get account information.

Sales representatives are able to analyze their sales cycles and lead management processes. The sales representatives and account managers now have access to up-to-date

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INDUSTRY:

- Healthcare Insurance

GEOGRAPHIES:

- North America

PROJECT SUMMARY:

- Multiple legacy systems centralized into single repository for all customer, broker, agent, and prospect information
- Roll out of CRM system to sales team to standardize and streamline sales processes: Enable a disconnected mode solution, which allows users to have remote access to their information
- Five-week eMail Response implementation to Call Center representatives, allowing more timely response to customer inquiries
- Two-week Business Case/Metrics assessment to determine ROI for new call center and obtain consensus to move forward
- CRM Roadmap™ to plan for company-wide rollout of customer service initiatives, addressing all functional, technical and change management issues

OUTCOMES:

- Increased revenue through cross-selling and up-selling
- Faster, more accurate customer service and customer experience; response time for Web and e-mail inquiries cut from 14 days to 1-2 days
- Decreased cost per contact; improved productivity
- Solid business case for justifying future CRM investments; financial modeling tool helps evaluate options and drive future decisions



sales and account data, allowing the sales representatives to create detailed reports that better grasp the potential of their sales prospects. Sales representatives can maintain productivity by accessing this centralized information on the road. Then, within a five-week period, Innoveer Solutions implemented automated e-mail response, enabling customer service representatives to receive immediate e-mails rather than waiting for a manager to review and delegate them, as well as electronic communication “templates” and first-time e-mailing capabilities.

Innoveer Solutions then performed a two week Business Case/Metrics project analyzing ROI for CRM in call centers. Innoveer helped GHI define business objectives and desired outcomes for the call center, as well as key metrics linked to those objectives. Innoveer's business case gave GHI management comfort with subsequent CRM investments, as well as the consensus to move forward with the new call center.

Innoveer Solutions then developed a CRM Roadmap™, including a Program Definition plan that addressed all functional, technical, and change management issues involved in the planning for GHI's enterprise-wide customer service initiative. GHI's desired outcomes included: 1) a consolidated view of the customer, regardless of the channel of interaction; 2) seamless Call Telephony Integration (CTI) to the Automated Voice Response Unit (AVRU); 3) increased accountability for GHI representatives; 4) increased internal efficiency within the call center by transitioning from a paper-based system to automated business processes. In addition, Innoveer assisted with confirming the advantages of rolling out its CRM solution to all service units at GHI. The CRM Roadmap included the strategy and workplan for rollout to the three major groups: Medical Service, Dental Service, and Hospital Service. On the periphery, additional deployments include rollout to the Account Services, State Services, and Quality Assurance departments.

“Innoveer genuinely understands our business needs, and has both the consulting and technical expertise to help us truly benefit from CRM. They have demonstrated a superior ability to integrate new CRM applications with our unique business processes and IT systems.”

David Henderson, Senior Vice President & CMO
GHI

OUTCOMES

GHI has made CRM a foundation of its sales, service, and marketing strategies moving forward for reduced costs, enhanced employee productivity, and increased revenue.

Salespeople can easily locate information without poring through multiple databases. Information flows seamlessly from sales representatives to account managers in a format that encourages cross-selling and up-selling. Sales representatives are also better able to analyze sales cycles and processes, and they have dramatically improved access to current data and reports.

Customer service representatives have been able to speed up service and lower their cost per contact. Response time for web and e-mail inquiries was reduced from 14 days down to 1-2 days. The result is a heightened opportunity to know and serve customers, with corresponding improvement in the critical day-to-day client and partner relationship.

