

## Blue Cross Blue Shield of Vermont Shares Best Practices for Becoming a Top-Performing Contact Center

Blue Cross and Blue Shield of Vermont (BCBSVT) has been a primary part of Vermont's health care system for more than 30 years, providing thousands of Vermonters with health benefits and services. Its award-winning call center embodies the company's philosophy and culture of being committed to customer-driven excellence and creating a superior member experience. BCBSVT staff demonstrate an unwavering faith that they will prevail in the end, regardless of the difficulties, by demonstrating a strong professional will, courage, and a relentless drive for meaningful progress and innovative change. This understanding of who they are and their responsibility to those they serve – both members and providers – translates into their actions each and every day.

### The Challenge

Flash back to 2013, BCBSVT already had relative strong success with achieving First Call Resolution (FCR) for a number of years. At the time, Emily Fair, Director of the company's call center, assessed that what was lacking for the organization was a formal coaching model that included training supported by a coaching framework, not only for the Customer Service Representatives (CSRs) but for those who were asked to coach CSR performance.

"At the time, our CSRs were doing well, though we weren't among the top-performing Blues plans. When we would go to a conference, the best plans were sharing their success stories and they were talking about Ulysses Learning's approach to customer service and coaching. We thought we had opportunities for improvement and nothing to lose. So, we went forward with Ulysses."

--Janalee Willett  
Call Center Supervisor, BCBSVT

Emily had heard about Ulysses Learning through other Blues Plans who shared their best practices at the annual Blue Cross Blue Shield Association's Collaboration for Service Improvement

### A Frontline View:

CSRs enthusiasm for training and coaching keeps BCBSVT at the top of its game



*A Conversation with BCBSVT's Paul Brown, Customer Service Team Leader, and Terry Lyn Kelty, Senior Customer Service Specialist...*

**Ulysses:** *What has been your experience with the ServiceMentor training?*

**Terry:** I absolutely love the Ulysses techniques. The training program, I feel, has been the most positive and effective program I've ever been introduced to, and I've been in Customer Service just about all my life! I've been with BCBSVT for 10 years and I remember back when we first introduced Ulysses' program. Honestly, I was worried that things would feel scripted or robotic. I was nervous it was going to negatively impact the members by driving up the length of the calls. But once I got into the program and started seeing the rhyme and reason behind it, I was ecstatic. I learned that in a few simple steps, I could take control of my call and that was something I had struggled with before. The training had a huge and positive impact on me.

**Paul:** I've been with the company for four years now. I came from Vermont's largest utility company. I was the person who would knock on doors telling people to pay their bills or they'd lose their service. I never had any sort of structure for those conversations. So, when I started training

*Frontline View Continued on Page 4...*

(CSI) meetings. She was concerned, at first, with how they could integrate the Ulysses approach to customer service and coaching with what they were currently doing and how they could continue to grow and feed the initiative over time.

Janalee Willett, Call Center Supervisor at BCBSVT, was exposed to the Ulysses Learning approach and felt strongly that the Ulysses training and framework would integrate well with what the call center was already doing. With Emily's full support, she stepped up to take ownership of the initiative, which included implementing **ServiceMentor** and **CoachingMentor**, and to continue to nurture and develop it over time.

Another challenge for BCBSVT was their size. Being a smaller call center, coaching representative performance had always been difficult because supervisors wore so many different hats and had little time for one-on-one coaching. Plus, there were few supervisors to begin with as the organizational chart was flat with only a few levels between the frontline staff and the CEO. Representatives were also challenged because they, too, had to wear many hats. In larger call centers, reps could specialize in a particular product line or service. That was not the case for BCBSVT reps, they are cross-trained to be subject matter experts on every line of business and for every customer segment – members, providers (in-state, as well as out-of-state), and specialty card, such as BlueCard holders. These factors added another layer of complexity to coaching because the coaches have to be well-versed in all stakeholder conversations so they can give appropriate advice and counsel.

## The Solution

BCBSVT piloted **ServiceMentor** and **CoachingMentor** for 90 days and officially rolled out the training to all staff in August of 2013. Because the BCBSVT call center has a culture of embracing change, there was little resistance to Ulysses' training and approach. This was even true for tenured staff who had been answering calls the same way every day for decades.

Additionally, there were a number of early decisions that BCBSVT made that, in retrospect, contributed greatly to their success with the Ulysses initiative. First, within a few months after rollout they integrated the

approach into their quality monitoring program, as well as other performance programs that were in place. Second, they created a support structure for a true coaching culture.

To this second point, BCBSVT made the coaching process part of the coaches' job description and made it a top priority for which coaches were held accountable. When the center was busy, which is often, coaching was still kept on the front burner. Reps saw that their development was important because they saw that coaches were given the time to coach each and every

day no matter what else was going on in the business.

BCBSVT leadership admit that they used to be the call center that would have

"A key to our successful transition, was that we were consistent in supporting the Ulysses training and the coaching framework they provided. I've seen other organizations hit the training hard for the first month or two and then they get relaxed about it, expecting that the behaviors will just continue because they've trained people on how to use the strategy. I believe that having Janalee as our Certified Master Coach and her consistency in working closely with the coaches who work with the CSRs, made all the difference. And we made coaching a part of our existing processes so that it wasn't extra work. It was just how we did our day-to-day jobs."

--Emily Fair  
Call Center Director, BCBSVT

“We went from a situation where when someone came out of training it was painfully obvious to customers that they were interacting with a new CSR, to a situation where our members didn’t know the difference between someone who had walked out of training yesterday and somebody who had been doing the job for three years. The consistency in the level of professionalism was remarkable.”

-- Janalee Willet

Being consistent is a theme for BCBSVT. Shortly after the call center rolled out the Ulysses solutions, they rolled the initiative out to the organization’s Consumer Business Support Services and Enrollment Services teams. Currently, the program is being implemented with the Integrated Health team members who are responsible for medical case management. The organization is committed to taking on the Ulysses approach and making it their own.

“We consistently told our people that they are important to us, that we value them, and will never cancel their time for growth and development. And we followed through on our promise. In return, we saw significant increases in their performance and morale. We also saw an increase in their commitment to put in extra effort and do even more to serve our customers.”

--Janalee Willett

scheduled coaching sessions and cancel them when the queue got busy. That was particularly frustrating for representatives because when the queue is busy and they are feeling additional stress, that’s when they need coaching the most. With the implementation of the Ulysses’ approach, BCBSVT made a commitment to their representatives’ and coaches’ growth and development and they communicated that commitment regularly.

## The Results

“Between 2012 and 2015 we experienced a period of high growth in our membership base – upwards of 30%. We view Ulysses’ solution as playing a significant part in a cost-avoidance strategy that helped us grow to meet our members’ demand for our services, while improving our FCR and other efficiency measures. Most notable is that we accomplished this without large adds to staff.”

-- Emily Fair

Performance results from the new Ulysses initiative came early after the training was launched and continue to this day. On the FCR front, BCBSVT saw an initial gain in FCR of 5%. When BCBSVT rolled out Ulysses’ program in 2013, FCR averaged 76%, in 2014 FCR went up to 79%, in 2015 they stayed at 79% and in 2016 they were over 80%. Additionally, both in 2015 and 2016, BCBSVT was recognized through SQM Group (an independent customer experience and satisfaction research firm) for having the highest employee satisfaction in the health care industry. That accomplishment, combined with their high FCR scores (which were the highest among the call centers measured in SQM’s small and mid-sized call center category), earned BCBSVT the industry recognition as Call Center of the Year for the past two years.

Also, at the individual CSR level, BCBSVT received further industry recognition – beginning in 2015, 100% of the call center’s eligible CSRs were World Class Certified through SQM. This distinction is only shared with 24 other organizations from a total of over 500 organizations worldwide.

Beyond seeing improvements in performance metrics, BCBSVT saw numerous improvements in the behaviors of their CSRs. The Ulysses Call Strategy gave CSRs a clear view of how each call should unfold. CSRs behaved in a more controlled and confident manner, knowing that if a call begins to escalate they have the insights, techniques, and tools to say the right things and bring the call to a successful conclusion, no matter what type of call came their way. Having a call flow CSRs can rely upon and refer to when needed, helped BCBSVT fill a gap in CSR growth and development and take their already good customer service operation to the next level.

BCBSVT leadership note that what they appreciate most about working with Ulysses Learning is that the Ulysses team is knowledgeable and passionate about their work and invested in BCBSVT call center’s success. They are attentive to BCBSVT’s needs, responding either immediately or within a business day, and offer insights on how to close performance gaps. They also work on behalf of BCBSVT, networking them with the right people at other Blues plans for additional insights to improve performance further.

“I just listened to a call where the customer actually started off by saying to the CSR ‘If you’re having a bad day already, you might want to transfer me to someone else, because it’s going to get worse’. The customer was noticeably upset, frustrated, and overwhelmed. The CSR expertly demonstrated the Ulysses strategy in action. She remained calm, acknowledged the overwhelming feelings the customer was experiencing, and then guided the call while expertly moving through the rest of the appropriate steps. At the end of the call the customer said ‘You know, I just feel so much better after talking to you. Thank you for listening to me. You have a calming way about you. I really feel that you heard me and that you care about me.’ That call is typical of what our CSRs are able to accomplish for our members each day. It is very powerful to listen to how they are able to de-escalate calls.”

-- Janalee Willet

*Frontline View Continued from Page 1...*

with BCBSVT and they told our class we’ll be using a new technique from Ulysses, I thought it was going to be silly. I admit that I was already stuck in my ways and wasn’t expecting much. Well, it was a life-changing experience for me. Just knowing that I can be in control of my calls and that I can de-escalate an upset caller (without the assistance of a supervisor), was a lifesaver for me. I strongly believe that the Ulysses approach is one of the reasons we stay a #1 plan for the Blues. I use it all the time – at work and at home. I’m a team lead now and I use Ulysses to support my coworkers to make sure I answer all their questions and fully resolve their issue or need so they don’t have to call back in. FCR is important for us on all types of calls. The Ulysses approach really is useful in any situation.

**Terry:** Yes, the Ulysses program is part of a very large team-building effort here. And it’s helped us bond with our team leads as well because we have

knowledge on how to ask questions better. The first year we did Ulysses, I won an award for most improved (13% improvement in FCR) overall customer service reps. I ended up going to the SQM conference as one of the Top 25 Customer Service Specialists who got their story told. It was an incredible honor. There are so many benefits to the whole program. I wish it was mandatory training for everyone in customer service, in every company, worldwide!

**Ulysses:** *That’s wonderful to hear! Let’s talk a bit more about your experience with the coaching process in your contact center.*

**Paul:** I’m responsible for coaching seven people. We also have a QA person who provides them coaching – five calls per representative. When using the Ulysses coaching approach with a rep, it makes the interaction so much easier. It gives you a tangible, solid concept to use so you’re not saying general comments like

“You should have handled this call better.” With Ulysses, you’re always focusing on what was that pivotal point of the call – what made that call a “wow” call or a “not-so-great” call – and then coaching and learning from there.

We have six team leads and we work together to support each other as coaches. If we are not sure on what the pivotal point is, we will calibrate a call together, to see what we feel is the best and most important part of the call. That absolutely builds and strengthens our team structure. Everybody is so willing to help and offer their suggestions.

**Terry:** I feel that working here and utilizing Ulysses has given me the ability to feel confident on my calls. The coaching that I have received from my team leads and supervisors, is not in any way meant to be negative. It’s something that gives me positive insight into how I can improve myself and my ability to take the lead on that call and help service our members. It has really helped me to develop and enhance my customer service skills so that I can be successful in providing member service excellence.

**Ulysses:** *Talk to me about a call type that used to be challenging.*

**Terry:** For me, my huge pain point was handling irate callers. I panicked and frequently lost control. My irate callers always managed to get escalated to a supervisor. Once I started using the Ulysses techniques, I gave members confidence in my ability to handle the call. I was able to take control of the call, remain calm, use good situation and probing questions and “I Can” statements so that I could resolve the member’s issue and de-escalate any concern they may have. Being able to feel like I have control to speak on behalf of our company and take ownership has made a big impact in my life.

**Paul:** For me, my challenging calls were when I had to tell someone “no”. “No” is so hard because we are so member-centric. We want to give the member the best experience they will ever have and saying “no” can be tricky. But when you use your Ulysses strategy and you focus on what you can do versus what you

can’t, that really helps de-escalate anyone who is frustrated. Ulysses’ call strategy is also a great tool to use to educate members because you’re always giving solutions with options. Even if the options are not what they wanted to hear, you can still provide excellent customer service. I have found that when those members get surveyed, they will still give you a great rating, saying that you resolved their call, even though you didn’t give them the answer they wanted.

**Terry:** The member understands that we are working on their behalf. They can see (and hear) that we are really digging into the issues and giving them tools so they can be proactive for themselves going forward. There are times when we cannot personally take care of something for the member, like call an out-of-state provider. In situations like these, I’ll tell them that we can send them something in writing that will give them the steps they need to take when they call that provider to resolve their issue. Sometimes that really puts their mind at ease because healthcare can be very confusing. When they have the words in writing that they can use, it gives them more confidence and a greater understanding of what they can do and how they can do it.

**Ulysses:** *I love that you provide your members with a conversation strategy and prompts to assist them when they need to make health-care related calls. That’s a wonderful teaching technique.*

**Paul:** That’s interesting to me that you say that. Earlier in my career I taught 7th and 8th grade alternative education for 10 years. But I have to tell you, even though I loved teaching youth, I really love the type of teaching I’m doing now. People ask me why I left teaching and why aren’t I using my college education anymore. I tell them that I’m using my education now more than ever before. When I’m on the phone as a CSR, I’m teaching. When I’m serving my co-workers, I’m teaching. When I’m coaching, I’m teaching. I may not be in a classroom, but I still consider myself as an educator. In my opinion, I think the way I’m teaching now is even more rewarding and has an even greater effect. I’m able to help many, many more people now than when I was teaching in a classroom.



**Terry:** I agree with Paul. I think that being in customer service means so much more to me today than it did years ago. I was working in a credit union for nearly 13 years as a teller. The level of communication was robotic – get the next person through and out the door. That’s not how we serve our members at BCBSVT. Many of the issues we help resolve are complex. With Ulysses’ techniques, I am able to step up to be an educator for the company and that member’s advocate. I recently had a customer who had a huge claim from an out-of-network provider, even though she was referred to this provider from an in-network doctor. Through probing her claim further and investigating different solutions, we were able to get out-of-network prior authorization for her, retroactively. As I was working with the member, she shared that she was just diagnosed with a rare type of cancer. She was upset and scared. I took the opportunity to get her hooked up with a nurse case manager who could help transition all the services she was going to need out of network. The member was relieved that she didn’t have to worry about that one additional item. What started out as an emotional and frustrating call for the member, turned into a very appreciative and thankful experience for her when she needed somebody most.

**Paul:** That’s why I cringe when I hear someone say that they are in customer service and they can’t wait to be doing something else or that they don’t want to be answering phones for the rest of their lives. I believe those people should not be in customer service. Yes, being on the phones is a part of how I do my work, it’s not what I do. I am helping someone resolve an issue every single day of my life. That’s my career. That’s what I like to do. I’m not just answering phones, it’s so much deeper than that. To be in this career, you have to want to help people. If you think that you’re just answering phones, then you’re in the wrong job.

**Ulysses:** *I have one last question for you. What advice would you give others who have not yet gone through the Ulysses **ServiceMentor** program?*

**Paul:** I would encourage them to do it. As I said earlier, it was life-changing for me. I use Ulysses every day in just about every possible situation. Just the other day I contacted my cable company. I used the Ulysses **ServiceMentor** techniques on the cable company representative, even though the tables were turned. They were not using good customer service techniques with me, so I used the Ulysses techniques because I wanted to make sure that I understood what the cable company was giving me. And I use Ulysses at home so much so that I get called out on it – “You’re using that Ulysses thing you do at work, aren’t you?” and I say “Why yes I am!” Since I started using the techniques at home I cannot remember having an argument in my household, over anything. I absolutely love it. It keeps me from being upset and overwhelmed. It keeps me calm.

**Terry:** The advice I would give is that it’s a definite must. Approach the training with an open mind. At first you may feel a little awkward in the way you approach your calls, but that feeling goes away pretty quickly. You’ll find that it can turn your way of thinking around and help filter each call in a much more positive and effective way. I use the Ulysses techniques as a guiding tool and it can be used, as Paul said, in everyday life, in and out of work. I use it with my 19-year old who is one emotionally stressed teen and I use it on my 8-year old as well. Recently, my oldest daughter has gone into customer service in a deli. I have been able to teach her some of the techniques and she’s already benefitting from them. It’s a life-changing tool, mostly built on common sense, but it’s the way that Ulysses approaches it that just makes the world of difference.

“The relationship with Ulysses feels more like a partnership where we are collaborating with one another. Also, it’s not a situation where you identify something you want to do with the initiative and they come back and say they can do that for an additional cost. I really appreciate the way they conduct themselves. They are very down to earth, helpful, and insightful.”

*--Emily Fair*

---

Ulysses Learning was founded in 1995 as a joint venture with Northwestern University’s Learning Sciences department and continues to bring clients new, innovative enhancements to its industry-leading training. Contact centers achieve profound business results, ahead of schedule, with Ulysses Learning’s artful blend of patented simulation-based e-learning, facilitated exercises, coaching, and tools that redefine the way customers are cared for and transform customer service, sales, and coaching cultures. Ulysses has the only training proven to build emotional intelligence or “EQ” so that Judgment@Work™ can be confidently, consistently, and expertly applied on every call.