

## Excellus BlueCross BlueShield's Stunning First Call Resolution Improvement Effort Delivers More Than Impressive Results

Excellus BlueCross BlueShield (BCBS), a nonprofit independent licensee of the BlueCross BlueShield Association, is part of a family of companies that finances and delivers vital health care services to about 1.5 million people across upstate New York. The company, headquartered in Rochester, NY, is the largest nonprofit health plan based in upstate New York. The Excellus BCBS Customer Care division includes 450 team members and operates four contact centers structured by markets to best serve its members and providers based on their needs and expectations.

### The Challenge

When First Call Resolution (FCR) began to be promoted as one of the new key performance indicators measured by the Blue Cross Blue Shield Association, Excellus BCBS took action immediately.

A top priority for Excellus BCBS Customer Care leaders is efficiency. To measure FCR effectively, they knew they needed to focus on exactly how calls were being handled and to better understand the optimal flow of each type of call. Serving multiple types of customers, with increasingly complex issues, Excellus BCBS knew they had their work cut out for them.

"We used to have a very informal way of answering the phone so that our Advocates would sound natural and not robotic. We didn't have scripts, nor did we want them. But we also didn't have call consistency. We were doing the best that we could, but we had no real baseline or benchmark to determine if our approach to achieving our new FCR goal was working or not."

– Nancy Earley,  
Director, Customer Care Group  
Market & Grievance & Appeals Unit

### A Frontline View:

**Health Insurer Empowers Advocates With Knowledge and Judgment Skills To Achieve FCR Results**



**A Conversation with Excellus BCBS Advocates Christian Arquette and Clara Bohrer. . .**

**Ulysses:** Talk to us about your experience after going through the **ServiceMentor** training.

**Christian:** When Ulysses first came out to launch the training, I was defiant. I'm a trouble shooter. When a member calls, I know what the issue is and how to get things solved. I was thinking there was no way I was going to use this. But my supervisor encouraged me to give it a chance. So, I surrendered and put the training into action...and all of a sudden, my FCR starts going up. Every call I took was so smooth when I used the entire conversation strategy from top to bottom. I had to admit it worked for me and so I made the commitment to stick with it.

For me the conversation strategy helps me keep the call stable. I feel I'm in control of the call and I can keep the call on the right track. For example, it's common for members to start the call by saying "Hi, can I

## The Solution

The story behind how Excellus BCBS began working with Ulysses Learning is all about timing and validation. Excellus BCBS Customer Care leaders were already in the process of figuring out a solution to improve FCR. During this process, they learned about Ulysses' work with other Plans in the BCBS System – work that was validated through case studies and a track record of achieving tangible results. Ulysses' validated solutions and results "held water" for Excellus BCBS leaders and they moved forward with implementing **ServiceMentor** and **CoachingMentor**.

*But the story didn't end there.* After the implementation of **ServiceMentor**, Advocates did a better job taking ownership and control of their calls. They handled the call as completely as they could so that the need to give callers "homework" or a list of post-call "to dos" was minimized significantly, as were the number of calls customers needed to make to resolve their issue. This

"Having a champion to focus on this important measure made an incredible impact. As our FCR Champion, Nancy pumps up the staff, she lets them know how they are doing individually and as a group, she shares with them where the opportunities are, and she shares with them programs to energize and excite them and drive for better improvement. She talks about where our performance gaps are and how each Advocate can contribute to closing those gaps. And she knows the value of coaching as one of the key drivers to achieving FCR results."

--Denise Palermo  
 VP, Customer Care Administration

approach to handling the calls applied to both those calls taken from members and calls from providers, which was another plus. Having one unified call strategy added to the efficiency of the solution.

Yet while FCR results initially spiked after implementing **ServiceMentor**, the results were not sustained mostly

due to a lack of coaching commitment. Ultimately, Denise Palermo, Excellus BCBS VP, Customer Care Administration, made a bold move and appointed a "FCR Champion" – Nancy Earley, Excellus BCBS Director, Customer Care Group Market & Grievance & Appeals Unit – and charged Nancy with the daily responsibility of focusing on FCR and all roads leading to it.

give you my ID#? I'll say "Oh yes, that's wonderful. I'll take that in a second, but how can I help you today?" That allows me to maintain that call and control it. And then I go forward with the strategies, again, because I know that when I use them, all of them, I have a very successful call.

I also think the "I Can" statement is really strong. That's an easy way to gain control. Now, when I hear that a member is frustrated, I immediately tell them that I understand their frustration and that I can definitely help them out with their situation. When I use the "I Can" statement I literally can hear the negative emotion leave the member's voice. They are relieved. Then I continue with the call and I'm able to use the other strategies like "Chill" and "Probing with Questions."

**Clara:** We talk about "feeling fearless" in our contact center. I feel I now have the confidence to feel fearless. Fearless, in that I know I have a management team that backs me up. They've given me this conversation strategy to use so I can feel more confident when I speak to my members. Sometimes I may not say the right thing or I may need a little help. For example, I'm responsible for our email conversations with members. Sometimes I have a loss of words. I go back to the tool – the conversation strategy – and I find it helps me word things differently. And I keep repeating different parts of the conversation strategy until I'm confident with using them and

One of the first items on Nancy’s priority list after being appointed FCR Champion was to get back to coaching basics. This included the re-establishment of the **CoachingMentor** processes and practices to hold Excellus BCBS 30+ coaches accountable for 1) providing behaviorally-focused coaching for each Advocate at least three times per month; 2) conducting just-in-time coaching (side-by-side, “fly by” and face-to-face interactions), and 3) knowing how to use the data to drive performance, with a special focus on auditing non-FCR calls to identify trends. Also, as part of the re-establishment of **CoachingMentor** and in order to gain the commitment of the coaches, Ulysses gave Excellus BCBS an accountability tool (AIM) that they used to track their coaching activities.

Nancy was also determined to have the right coaching leaders in place. Ultimately, Excellus BCBS appointed coaches to serve its four contact center sites. All three coaches attained Master Coach Certification through Ulysses Learning’s Master Coach Certification Program. This program is the first and only of its kind to receive CIAC Certification and endorsement by the contact center industry’s certifying body - CIAC.

At the same time, and also under the leadership of Denise Palermo, Excellus BCBS made another bold move. With encouragement from Ulysses Learning, Excellus BCBS shifted their internal communications around **ServiceMentor** so that their Advocates would view the program and core program elements as

“With Ulysses, we found a coaching practice that includes an ongoing cycle of call review, calibration, and feedback enabling continuous and ongoing improvement. Another part of our calibration practice is how we handle certain calls. Let’s say one of our coaches reviews a call and discovers that we did not resolve the customer’s issue appropriately. The Advocate, with the help of the Coach, will follow-up with the customer and offer an apology, indicating that as part of our training we reviewed their recent call and feel we could have done better. It could be we didn’t resolve the issue completely, we weren’t clear in our communication, or we picked up some tone on the call. Whatever is it, we apologize to the customer for what we thought we could have done better and offer a solution, if needed. This is something we now do as part of our coaching practice that we would have only done as an exception rather than the rule.”

-- Nancy Earley,  
 Director, Customer Care Group  
 Market & Grievance & Appeals Unit

then I move on to other parts of the strategy.

And I like that I can make the conversation strategy my own. I recently heard Jamie Lee Curtis comment on how she is here on this earth to serve others. I really liked that so I started using that in my conversations. Now when I answer my calls I say to members, “How may I serve you?” so that they know I’m here for them.

I also appreciate how the Ulysses training helped me improve my listening skills to take in the tone of the person’s voice, identify different personalities, and pull out key words. When I listen to people, I type out the key words they say so I can repeat those words to them to ensure that I’m understanding them and to let them know that I’m listening to them. Also, if a member is getting upset and using the same words over and over again, that prompts me to think about how I can put my explanation in different words or in a different context so that they better comprehend the solution or what I’m sharing with them.

**Christian:** Yes, I agree. And it really helps to put yourself in the members’ place. Look at the call from their perspective and give them good information they can use. For example, if someone has a benefit question, I’ll answer it and then I’ll make sure they are aware of what might happen when they go to the doctor so they are prepared. I think this is another way to achieve a higher FCR score.

their own versus a program from an outside vendor. For example, Excellus BCBS made a small shift in how they referenced Ulysses' *The Call Strategy*, calling it "our conversation strategy." Ulysses supported this action as past experience showed it's quite common for Advocates to reject new approaches and strategies as simply the "flavor" of the month. When the company owns or brands program elements as their own, they typically see better results. For example, this small shift in the name of one of Ulysses' core program elements resulted in greater acceptance of the program by Advocates so that it could truly take root in Excellus BCBS' culture. It also made it easier for Excellus BCBS leaders to align **ServiceMentor** to other strategies they were implementing in their contact center which further bolstered FCR.

## The Results

"Our handle time has gone up in every one of our markets. Now we are working on how we can make these calls even more efficient. There are a number of considerations. How attentively are Advocates listening to what the customer is really asking? How are they minimizing chatter? How can we resolve issues even more efficiently? By coaching and listening to our Advocates we are better able to answer these questions and gain new insights for improvement."

-- Denise Palermo  
 VP, Customer Care  
 Administration

Before working with Ulysses, the Excellus BCBS FCR scores for their sites ranged between the high 50s and low 60s. Today, FCR scores range consistently in the high 70s. Call volumes are consistently decreasing, because the need for repeat calls has gone down, AND quality scores are strong. Advocates are resolving issues on more first calls, providing accurate information and a level of service that is getting noticed. At the same time, Excellus BCBS leadership is quick to point out that the boost in FCR does impact other metrics in some more and less favorable ways.

However, the upside of Excellus BCBS' improved FCR scores is remarkable. Excellus BCBS customers are delighted and they are quite vocal about their satisfaction. Members and providers alike are making a point to let Advocates and Leaders all the way up to the CEO, know how they feel about their different experience. Advocates are receiving cookies, flowers, and thank you notes from customers. Customers are contacting Excellus BCBS' CEO, Christopher Booth, who regularly visits the contact center and also recognizes Advocates on the corporate online recognition system for all employees to see. The

And the members seem to notice a difference. After I started to really focus on using the strategies, I began to get really positive feedback from our members. I could hear the difference in their tone of voice and their words. They were really happy and they'd tell me what a great help I was and that they appreciated what I was able to do for them. When you hear that, it's really exciting and motivating. You want to keep hearing members share that kind of feedback.

*Ulysses: Speaking of feedback, what else do you find exciting and/or motivating about your contact center's culture?*

**Clara:** I know I mentioned how grateful I am to our managers for providing us the **ServiceMentor** training and tools, and I have to add to that their day-day-communication with us is another element I find extremely helpful. I receive a lot of emails from our members, but I always take the time to read emails from my supervisor, too. Every day, there is a tip on how to use the strategies to improve your call. There is advice on ways to approach difference situations, including ideas for what to try or not, or what to say or not.

**Christian:** The coaching is so huge here. I believe without it we wouldn't have those high FCR scores. I remember a coaching conversation with my supervisor where she showed me how to get rid of the fluff comments and get straight to the point. This helped me reinforce what I learned to control the call. And we are always

positive communications across all levels of the organization is part of the Excellus BCBS culture and the excitement it creates is infectious.

Excellus BCBS Customer Care executives encourage leaders and all employees throughout the company to come into their call centers and experience their Advocates in action, firsthand. This was one part of their multi-faceted communications plan around FCR. In addition, Excellus BCBS Customer Care leadership executives spent time in other parts of the company, outside their contact centers speaking at meetings and operations forums, while participating in interviews for key corporate publications, regarding Call Center operations, improvement and the value of FCR.

You can feel the excitement around FCR at Excellus BCBS because people can “wrap their arms” around the notion of FCR and the positive results FCR creates for customers, Advocates, and the company. It took considerable effort from all involved and a willingness from the Excellus BCBS Customer Care leadership to put a Champion in charge of FCR and to get back to the basics of providing excellent customer service, enabling Advocates to have even more efficient and empowered conversations with customers, while installing a thoughtful and consistent coaching practice to keep the momentum going.

“We wanted leaders throughout the company to understand FCR—what it is, its value, how it shows up in other measures, and how it relates to our inventory or call volume. On this last point, I remember getting questions about our lower call volumes. I explained that before we started focusing on FCR, we were getting the higher volume for the wrong reasons. Our call volume was driven, in part, by disgruntled customers who had to call back 3-4 times. Now we can link our increase in FCR and Net Promoter scores with our decrease in call volume.”

-- Denise Palermo  
 VP, Customer Care Administration

receiving feedback. The remote listening, side-by-side coaching, and continuous monitoring is wonderful. It’s easy to miss things on the call. It’s a comfort to me to know that they are listening in. And I love the feedback. I don’t take it as a negative thing. And I like that it’s ongoing.

**Clara:** I love how they word the feedback, too. Our coaches say things like “let’s take it from a good call and make it into a great call or a better call.” They share all you did right, and they don’t talk about what you did “wrong.” They talk about how to take it up a notch. They coach around the full performance.

Also, I have to agree with a comment Christian said earlier. When I first heard about the Ulysses Learning training and strategies, I was skeptical. People said “I don’t want to be told what to say” or “This will just go away and be replaced in 6 months.” But I am so glad we stuck with it. We use the tools every single day. It doesn’t stop. I even use the conversation strategies with my nine-year-old son and I give him feedback in the same way I get it at work. I tell him “this is what positive and constructive feedback sounds like, and you know what, mommy gets feedback at work, too!”

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.

Begin your contact center transformation now. Phone 800-662-4066 or visit [www.ulysseslearning.com](http://www.ulysseslearning.com) to get started.