

Case Study: Medicare Part D

Background: Synergy partners with leading Medicare provider to develop world class marketing channel for senior population.

A Bit of History

In January 2006, the U.S. Center for Medicare and Medicaid Services (CMS) allowed approved health plans to begin offering Medicare Prescription Drug coverage plans, known as Medicare Part D, to Senior Citizens and other Medicare eligible populations. This was a new and complex Medicare Plan, and many Health Insurance companies and Prescription Drug Plan (PDP) Providers raced to compile offerings that would meet an intricate system of requirements and to identify methodologies to communicate the complexity of these offerings clearly and effectively to a senior demographic.

After the enrollment period ended in May of 2006, most providers realized that they had scarce time to re-tool before the next enrollment season (with plan advertising launching in October 2006, and enrollments beginning in November 2006). In addition to rampant confusion in the market place regarding plan usage and benefits, there was fierce competition, as suppliers organized their strategy for a huge “land-grab” during the limited marketing window sanctioned by CMS known as Open Enrollment.

Throughout this time, Synergy Solutions developed a core specialization in the area of call center support for the senior market. Synergy played an active role in offering customer care and enrollment services for the predecessor to Part D –the Medicare Prescription Discount Card and served as the primary enrollment arm for over 200,000 beneficiaries. Synergy expanded on this experience to develop a cadre of call center support services for the Medicare market and developed key relationships with both Medicare Advantage (MA) Providers and PDP Providers who were competing for Part D market-share.

Synergy leveraged its expertise in scalable call center operations across many industries to provide a viable solution for Medicare call center support. Synergy developed senior sensitivity training modules for all front end staff, and deployed stringent quality assurance standards which engendered excellent call management techniques to deliver superior service to callers.

Synergy allocated additional capacity, infrastructure, management support and dynamic technology to support the increased need for call centers to provide beneficiary education and enrollment support for Part D and other Medicare products.

Additionally, Synergy utilized its active network of licensed insurance agents to support Part D enrollments and the sale of Medicare Supplemental products. Synergy’s demonstrated experience in offering programs in English and Spanish, managing call spikes while providing

quality contact with seniors and meeting all service level requirements earned it the trust of its clients who were preparing for another season of Open Enrollment in Q3 2006.

Business Challenge

As Synergy developed its core expertise in the area of Medicare marketing, it began a relationship with a large regional health plan that offered Medicare products in 41 states. Synergy's initial launch with this plan involved utilizing licensed insurance agents to conduct lead generation via outbound calling. During this pilot program, Synergy was able to demonstrate its skills and commitment to quality and consequently was given the opportunity to partner with this client on an integrated inbound and outbound program.

The objective of this campaign was to reduce customer erosion during the mass marketing window associated with PartD, and to increase customer loyalty through proactive benefits education.

Quality was paramount to this client. This campaign not only represented a strong brand to potential customers, but also served as the face of the company with their current plan members. This client had utilized the teleservices channel for lead generation but had never outsourced any call center interaction with existing plan members prior to this program.

Key attributes required of Synergy were:

- Professionalism
- Senior Sensitivity
- Strong Commitment to Compliance and Data Privacy/Confidentiality
- Script Adherence
- Accuracy of Data

Additionally, this client required a strong disaster recovery plan; the ability to blind monitor agents; a robust methodology for internal monitoring; a commitment to quality training and coaching of agents; and a strong history of client satisfaction.

After a thorough evaluation and RFP process, Synergy was chosen based on their proven ability to excel and deliver on all of these business requirements. The very complex, multi-channel program involved:

- Accepting inbound calls generated from direct mail, TV and other forms of media advertising. The objective was to collect basic contact information and register prospects for a health seminar.
- Accepting inbound calls from current customers who had received a direct mail piece outlining their current plan benefits. The objective was to collect information on the customer's level of satisfaction and current insurance coverage as well as register them for a health seminar.
- Make outbound calls to customers as a follow up to a direct mail piece sent to them. The objective was to create customer loyalty and promote retention by assessing the customer's level of satisfaction, as well as register them for a local health seminar.

Business Challenge

In keeping with its innovative approach to process improvement, Synergy built a robust scheduling application. Using this technology, Synergy's Customer Service Representatives were able to manage 41 separate service locations while consistently exceeding their scheduling quota (by location). In addition to scheduling both customers and prospects, Synergy placed a proactive courtesy reminder call in advance of every appointment.

This courtesy call was accomplished by another technology platform built by Synergy. This tool allowed for reservations made on the scheduling tool and then would automatically route to an outbound program for a reminder call triggered by the seminar date.

Synergy demonstrated its flexibility and commitment to customer service during the design and launch of this complex program, which occurred in a truncated time period. Within a very short ramp period, Synergy was able to build custom technology, procure appropriate toll free numbers, develop a forecast and staffing plan, and offer a flexible staffing model to meet the needs of its client.

Synergy developed a customized staffing model for this client to provide for dedicated agents during peak hours. Due to CMS requirements, Synergy was required to handle inbound calls between the hours of 8am – 2am EST, seven days per week. Because of the limited volume of calls from seniors during these peripheral hours, Synergy worked with this client to augment their dedicated staffing model with shared agents during peripheral coverage hours. Synergy assigned a Six Sigma trained Program Manager to provide program oversight and guidance. As part of Synergy's management model, Synergy maintained a rigorous quality-monitoring program. As part of this program, Synergy facilitated two client remote monitoring sessions per day.

Over time, as Synergy demonstrated unparalleled quality and built trust with the client and the client's customers, these sessions were reduced to a weekly frequency. This integrated program, which is still active today, in addition to generating high attendance for the seminars, has garnered excellent client and consumer feedback. Because of Synergy's success with the outbound program and the higher-than-expected number of confirmed seminar appointments, the client extended the calling window beyond the original scope of the Agreement. Synergy's ability to execute on client goals and develop innovative service solutions created a win-win situation for Synergy and our client.

The Moment of Truth

Synergy received the following feedback about this program:

"Great job! I wanted to share some good news with you about the overall success of the program. We had a conference call with the market managers today to touch base about the seminars and the managers are very happy with the success of the seminar invitations to customers and prospects. They reported a good turnout at the seminars and they said the Synergy representatives are doing a good job at sending happy customers. Having the happy customers mingling with the prospects has increased sales and kept morale high among the sales agents. We appreciate all you and the rest of the staff have been doing toward this program."