Common Challenges
Call Centers

1. Gathering relevant market intelligence to better target and segment the market

2. Equipping team with insight & tools to help grow advocacy

3. Providing a consistent, streamlined experience

4. Increasing reach and finding innovative ways to better engage patients and physicians
The patient experience is a strategic imperative among 90% of healthcare executives (based on APQC/Beryl/Gelb Benchmarking). In most cases, access is one of the first measures patients have against their expectations and your brand promise.

We intentionally examine the differences between functional needs (what is done) with emotional needs (how patients and physicians feel about the interactions).

Key Operational issues for Call Centers involve the inability to track callers who have not made an appointment. Our Dashboard tools provide ready access to metrics for decision making.

We believe that culture and your brand promise are linked through the experience delivered.

We call this Customer Enchantment
Process: Ensuring Continuous Improvement

- Listen
- Define
- Promise
- Deliver
- Reinforce
Best Practices
Assessing Performance

1. Voice of the Customer
2. Standards and Processes
3. QA Performance Management
4. Front Line Empowerment
5. Change Leadership
6. Education and Skill Development
7. Technology and Tools
8. Channel Development (Web)
9. Business Objectives
## Benchmarks

Performing at the Highest Levels

<table>
<thead>
<tr>
<th>Enchant</th>
<th>Engage</th>
<th>Basic Needs</th>
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<tbody>
<tr>
<td>• Interactive web design with chat access</td>
<td>• Collection of Medical Records</td>
<td>• Patient friendly static websites</td>
</tr>
<tr>
<td>• Mobile friendly content</td>
<td>• Staff tracking tools</td>
<td>• Diagnosis Based Ed Materials</td>
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<tr>
<td></td>
<td>• Live answer to all calls (instant queue)</td>
<td>• Friendly knowledgeable staff</td>
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<td>• Single Contact Resolution/real-time recovery</td>
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</table>
## Examples
### What You Can Assess

<table>
<thead>
<tr>
<th>VOC</th>
<th>Employee</th>
<th>Culture</th>
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<tbody>
<tr>
<td>Existence</td>
<td>There is a process for measuring contactor satisfaction</td>
<td>There is a mission statement and a set of established values</td>
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<tr>
<td>Frequency</td>
<td>Post contactor survey offered within 24 hours of contact</td>
<td>Employee satisfaction is measured at least annually</td>
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<tr>
<td>Coverage</td>
<td>Sources are offered to all or randomly selected</td>
<td>Organizational values are customer centric</td>
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<tr>
<td>Content</td>
<td>Communication: There is regular and ongoing communication about</td>
<td>Promise: Employee satisfaction or engagement results are communicated to the organization</td>
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<tr>
<td></td>
<td>recruiting and ongoing communication to the organization</td>
<td>Successes and challenges of the organization are communicated</td>
</tr>
<tr>
<td>Analysis</td>
<td>Communication: There is a process for communicating call center goals</td>
<td>Deliver: There is ongoing communication to the organization</td>
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<tr>
<td></td>
<td>and objectives to the organization</td>
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<tr>
<td></td>
<td>Deliver: Recruiting and hiring is behavior-based</td>
<td></td>
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<tr>
<td></td>
<td>A new-agent training program is in place to build confidence and</td>
<td>Deliver: Recruiting and hiring practices are aligned with</td>
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<tr>
<td></td>
<td>competence in interpersonal and technical skills that drive</td>
<td>organizational values and guiding principles</td>
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<tr>
<td></td>
<td>superior contactor satisfaction</td>
<td></td>
</tr>
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<td></td>
<td>Execution: Agents are empowered to adapt the call standards to</td>
<td>Execution: Values are regularly linked to performance at the</td>
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<td></td>
<td>unique customer situations</td>
<td>individual and organizational level</td>
</tr>
<tr>
<td></td>
<td>Execution: Agents are provided with tools and resources (e.g.</td>
<td>Quality: Customer and employee feedback is used when making</td>
</tr>
<tr>
<td></td>
<td>knowledge base) to delight contactor</td>
<td>technology enhancement decisions relative to call center activities</td>
</tr>
<tr>
<td></td>
<td>Execution: Customers are contacted proactively whenever potential</td>
<td></td>
</tr>
<tr>
<td></td>
<td>dissatisfieds are identified</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Quality: Calls are monitored on a regularly scheduled basis</td>
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Insight to Action
Identifying Key Expectations

Awareness
Need
Scheduling
Treatment
Transition

Care
Communication
Coordination
Results
Activating the Strategy

Standard reports and dashboards typically included are:
- Access Scorecard
- Call Center Feedback Tool
- Lead Management
- Escalation for Follow-up/Service Recovery
- Service Line Reports
- Executive Report
- Transition of Care Dashboard

Patient360 Demo:
http://vimeo.com/114725576
## Our Value

**Adapting Best Practices**

<table>
<thead>
<tr>
<th>Industry Expertise</th>
<th>Research-Driven Insights</th>
<th>Practical Strategies</th>
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<tr>
<td>We bring best practices designed with national leaders in healthcare</td>
<td>Benchmarks created based on work with healthcare system call centers</td>
<td>Our process ensures the operationalization of the models</td>
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<tr>
<td>We understand AMC’s, cancer centers and call centers</td>
<td>Experience mapping used for insights and strategy development</td>
<td>We provide a team of former executives who have implemented call center re-designs</td>
</tr>
<tr>
<td>J. D. Power-certified Call Center Senior Assessors</td>
<td>Best practices research regarding the patient and physician experience</td>
<td>We can provide client training to facilitate customization, encourage ownership and reduce external costs</td>
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Since the early 90s, we’ve been using this approach to organize insight development, strategy design, and experience monitoring.

- Patient Experience Management
- Physician Experience Management
- Donor Experience Management

Gelb has the experience to guide your strategic marketing efforts with well-executed marketing research and proven methods to design winning strategies.

- Healthcare Growth Playbook
- Health Brand Strategy
- Digital Insights and Dashboards

Our team of former healthcare executives have executed strategic planning, transformation, and programs.

- Strategic Planning
- Financial Analysis
- Revenue Cycle Improvement
- Operational Excellence
- Organizational Transformation
- Quality and Patient Safety
- Executive Transition
- Destination Medicine
The Gelb Difference

Our collaborative, information-based approach instills confidence in results and brings into focus the true meaning of offering an exceptional customer experience.

We have been specializing in creating healthcare market leaders for decades. Our approach applies industry best practices and proven frameworks to real-world situations.

Our team members have depth and breadth of experience and knowledge; many have executive-level experience at leading healthcare organizations.

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