

# A not-for-profit healthcare organization continuously aims to provide the community with innovative health-related products and services reached out to Insite to help train its leadership supervisors.

Their award-winning customer service, dedication to quality and affordable health care, and unmatched relationships with physicians and providers have consistently recognized them as one of the highest-ranking health insurance plans in the nation – and they were looking for ways to up their game.



## 50%

Reduction in  
Audit Errors

## 32SEC

Reduction  
in AHT

## 25%

Improvement in  
Agent Performance



## Challenges

With a “promote from within” policy, many of their supervisors had advanced to other positions, paving the way for agents to move into the supervisor role. Although these new supervisors were top performers in their agent roles, they had little-to-no leadership or past managerial experience. Consequently, customer service declined as their leadership team faced coaching gaps. Furthermore, they needed to get their supervisors up to speed as the busy Open Enrollment season was around the corner.

This company needed tools to help pinpoint where to best spend their coaching time and what Customer Service Representative (CSR) behaviors they should be looking for. They wanted to focus specifically on the skills to coach the following key behaviors centered around high-performing customer service:

- Active Listening
- Critical Thinking
- Understanding how to reply to the member

This healthcare organization engaged Insite to **quickly upskill new supervisors by facilitating a series of leadership and performance-focused training**. They were interested in prioritizing **training for coaching with an emphasis on the customer experience** using our metric-driven training program. The metric they wanted to put at the epicenter is Voice of the Customer, focusing on specific skill competencies around coaching, process management, and analytics to root cause coaching behaviors.



## Solutions

Before we began work, we conducted a management evaluation. This company, at the time, had the supervisors focusing on Voice of the Customer, CSAT, FCR, and Quality. Keeping performance metrics at the epicenter, we customized a training module for each metric. We concentrated on learning and applying the competencies identified in our management evaluation within each module. Each module/metric became the focus for 3 to 4 months with custom training sessions, real-world practice sessions, publishing improvements, and implementation support.



## Results

Through the engagement, we helped this company **out-perform the #1 healthcare provider within their region in customer service**. In addition, **they out-performed their biggest competitor significantly** – with an 87-point difference in their scores.

- We witnessed **a reduction in baseline audit errors from 70% down to 19%**, which the team and reps achieved through error tracking.
- After demonstrating to supervisors how to identify if the reps are using the IH Error disposition code correctly through a manual auditing process, **we saw a baseline of 57% go down to 44% in errors**.
- **As a result of our training**, their supervisors were able to **reduce handle time to an average of 32 seconds** without sacrificing customer service.