



Tackling expansion and health reform stresses

The Company

Health Alliance Medical Plans is an Illinois-based insurer serving 270,000 members. The company recently expanded to two new states and won two new Medicaid contracts, driving new contracts in both the commercial and individual sectors of the business. The company has two contact centers with a total of 100 customer service representatives.

The Challenge

In late 2012, Health Alliance saw a coming storm. The upcoming expansion to new states, entrance into the highly-regulated Medicaid market, and the implementation of new plans compliant with the Affordable Care Act were causing an information deluge.

Health Alliance's Director of Customer Service and Audit, Angela Beitelman, had talked to existing Panviva clients and was convinced that Panviva was the tool she needed to harness the data, support her customer service representatives and continue to deliver the level of customer care that Health Alliance members had long depended on.

Panviva business process guidance software provides knowledge workers with instant access to the exact information needed, workflow navigation, applications, and communication all in one place, through a simple interface.

"Panviva is able to provide that step-by-step guide to our employees about how to use each application," Beitelman said. "The business process guidance software tells agents what application they should use based on the customer interaction. With Panviva, our customer service representatives don't waste time hunting for information in multiple applications or guessing at answers."

A Defining Moment

Beitelman's plan was to get Panviva up and running before her contact center faced the brunt of upcoming expansion and health reform stresses. But as she began Panviva implementation in January 2013, the storm hit. "If that performance were to have continued we would risk penalties for contract violations with some of our clients, we would risk loss of sales, and potentially risk not being awarded new contracts," Beitelman said. She had to make a quick choice – continue with the Panviva implementation, or abandon it to deal with the immediate crisis. Beitelman chose the former, and she's glad she did.

The Turnaround

Beitelman decided not to refill five full-time and two part-time positions after some of her best staff were promoted. Going into 2015, Beitelman will again need to hire to accommodate members signing up for the new Medicaid programs. But she said she will be able to add staff at a slower rate.

Could Health Alliance have regained its top-notch customer service metrics without Panviva? "Maybe," Beitelman said, "but it would have taken longer, and it would have required hiring additional staff."

Initially, customer service representatives were skeptical about needing to learn another new application. But soon Beitelman began receiving emails from customer service representatives that read, "I get it, I understand why you bought Panviva. This is one of the best tools you've ever purchased for us."

Beitelman's team felt more supported and turnover dropped. She saw customer service representatives' mastery spike, and with it, customers' trust in Health Alliance.



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— Angela Beitelman, Health Alliance's Director of Customer Service and Audit

"Panviva has increased the level of confidence that representatives have when they give an answer," Beitelman said. "So the health plan member feels, 'yes I got the answer, the representative knew what they were talking about, I don't feel the need to call back and see if I get a different answer'." If the member does call back, the Panviva roadmap ensures they will get the same answer.

Measuring ROI

Beitelman says advantages to working with Panviva are the business consulting approach and demonstrable health insurance industry experience they bring.

"The Panviva team helped me to develop an ROI calculator based on previous implementations with payer organizations as well as metrics specific to Health Alliance. This enabled me to project for senior staff how we would be able to impact the organization over a one to three year period, by implementing Panviva. So far I am finding that we have surpassed our initial ROI calculations."

In addition to cost savings associated with fewer new hires, Health Alliance ranked first in the J.D. Power 2014 Member Health Plan StudySM among regional competitors and also attained a National Committee for Quality Assurance "Excellent" Accreditation. Beitelman was just as satisfied when

she put her contact center to her own tough challenge – pleasing her parents.

"Your parents are going to be honest with you about your company," Beitelman said. "So I had them call in, posing as members. They were treated with courtesy and professionalism and they felt they got information they could rely on."

What's Next?

Beitelman now has an ambitious plan to expand the use of Panviva beyond the contact center, to divisions throughout the company including claims and marketing.

Health Alliance Medical Plans' vision is to become a big company that retains the caring culture of a small company. As the insurer grows, the deployment of Panviva is helping Health Alliance to continue its reputation as a nimble, responsive health plan. Panviva is enabling the company to seamlessly scale contact center operations, as it welcomes new members from Nebraska and Washington, as well as customers buying two new insurance products launched earlier this year. Looking towards the future, Beitelman says Health Alliance expects to expand into new states in 2016. She's confident Panviva will be a key tool in managing that growth.

Panviva will transform your customer experience!

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