

# Enterprise Case Study: Breaking through process silos to improve the customer experience

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How CareFirst transformed its operations with Salesforce Service Cloud

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Tom Pringle

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## Background

Today's contact centers are often prevented from reaching their maximum productivity, which is due in part to fragmented data handling processes, and internal silos that are created as a result. This was the case at CareFirst BlueCross BlueShield (CareFirst), the largest health insurance provider in the US mid-Atlantic region. One of CareFirst's service departments overhauled its operations with the help of Salesforce's Service Cloud platform, and now has some of the highest customer satisfaction levels within the company.

CareFirst serves approximately 3.2 million members in Maryland, portions of northern Virginia, and the District of Columbia. Part of its mission is to provide health coverage to 577,000 members of the Blue Cross and Blue Shield Service Benefit Plan (FEP), which is a plan under the Federal Employees Health Benefit Program.

The internal group responsible for FEP services has 100 customer service representatives who respond to customer inquiries at three separate locations. Until recently, the functions of those three locations were separated, each one handling a different segment of the customer base. The overall operation had been created by the merger of two Blue Cross Blue Shield entities. As a result, lines of responsibility were dispersed and technology was somewhat redundant. While it was possible for customer service calls to be transferred between groups, the routing was not automated based on the next available agent. CareFirst's FEP group was not able to spread workloads or volume equally depending on its real needs, but was stuck with a configuration that left each regional site somewhat isolated from the others.

CareFirst executives knew that they had room to improve their operational performance, and that a lot of the required changes had to come from an overhaul of their technology. They were heavily dependent on legacy systems that accessed multiple, disparate data sources to process inquiries and claims.

To add complications, the existing infrastructure required agents to separately sign on to different applications, and gave users very limited visibility into previous interactions that had occurred with members and providers. CareFirst was reliant on mainframe and other technologies, some of which had been developed in-house over a long period of time, and were repeatedly modified in ways that made them hard to update and keep current.

In this context, CareFirst's goal was to advance the technology base to take advantage of new capabilities inherent in a modern platform, and not just to replace the old platform.

An executive describes an environment in which there were multiple systems for relevant interaction data that agents would access, each with its own screen and desktop, separate sign-ons, and separate user interfaces. The executive cites that confusion – and the potential for error and slowdown inherent in switching from one application to another – as a big driver for wrapping all of the source systems together into a single desktop application.

Without a single launch point for agents to work from, interaction handling took longer than was desired, and employee engagement was not as high as CareFirst wanted it to be.

## Undergoing transformation

CareFirst looked internally for examples of tools that were already in place that provided a roadmap for how to integrate multiple functions in a clean, worker-friendly environment. An example they found was the Salesforce Sales Cloud, which was being used by CareFirst's marketing department. The experience the firm had with Sales Cloud encouraged them to consider the Service Cloud to tie together the disparate strands in their contact center.

According to Mel Greene, CareFirst's vice president of technical operations and support, one of the most important features they were looking for (besides a unified agent desktop) was control over workflow in order to manage the healthcare claims process. The Service Cloud toolset includes intelligent workload management capabilities directly aimed at addressing this requirement. Service Cloud allows agents to prioritize work by taking into account their capacity, current workload, and the priority of the channel. Further addressing this particular challenge, it enables agents to explicitly state status as online and ready for work, busy, or offline to ensure that work is routed effectively, based on availability. This means that agents do not have to go to a list to pull their next piece of work, but can have it pushed to them when they are ready. "What is unique for us is that the CRM and the workflow are integrated," says Greene. "Someone who answers the phone can access the workflow component and will know a lot more about the claim in process as a result." Issues are resolved more efficiently, with fewer snags related to agents having to access multiple applications.

The solution was initially deployed in a pilot project in January 2015. Those early users worked with CareFirst's own Agile teams to make enhancements and fixes before rolling the system out to all users in the group by mid-2015. There were no reported issues when the system was deployed wide scale.

At the same time as the rollout, the company's organizational structure was also being changed, with efforts to untangle some of the process issues related to having separate locations and different queues based on customer geography. "While the changes were independent of each other, the technology has enabled CSRs to gain efficiency as well as be provided with a more complete picture of each customer at the time the inquiry is received," Greene says. By tackling organizational and technological adjustments in tandem, CareFirst was able to streamline processes without creating new silos.

The result is that there is now one single inquiry queue that can handle calls from all customers. Someone calling from Maryland can now be served by someone in the West Virginia location, which makes load balancing and resource allocation much more efficient.

It also makes the job of being an agent much more pleasant. "Agents love it," Greene notes. "It has really increased employee engagement. We worked with the agents early on as part of the project team to determine the screen layout and usability." With agent input into the process, they could see the benefits of the change and participate in making it more effective.

## Why Salesforce?

CareFirst evaluated a number of potential solutions to their service problems, and settled on Salesforce's Service Cloud as they felt it to be flexible enough to meet both current and future business needs.

"We knew that Salesforce gave us the flexibility to create what we needed. The deeper my team got into Salesforce, the more they knew they could build," Greene adds.

## The outcomes

CareFirst FEP has historically had very high customer satisfaction levels, so it was not necessary to dramatically move the needle on performance. The goals of this project were to maintain or improve current satisfaction levels, while providing increased value to customers.

They also saw improvement in some of the key measures that determine productivity and employee satisfaction. Call talk time was reduced, for example, and quality scores went up. These indirectly lead to higher customer satisfaction. CareFirst also witnessed a reduction in the amount of training time for newly hired employees.

"With Salesforce, the agent knows a lot about that customer. By the time they answer the call, they have a 360-degree view of that member," remarks Greene. For the FEP business team, that has contributed to having the highest customer satisfaction levels within all of CareFirst.

## Appendix

### Author

Keith Dawson, Principal Analyst, Customer Engagement

keith.dawson@ovum.com

### Ovum Consulting

We hope that this analysis will help you make informed and imaginative business decisions. If you have further requirements, Ovum's consulting team may be able to help you. For more information about Ovum's consulting capabilities, please contact us directly at [consulting@ovum.com](mailto:consulting@ovum.com).

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[analystsupport@ovum.com](mailto:analystsupport@ovum.com)

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