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**2012 NLC PBL CLIENT SERVICE**

**PRELIMINARY CASE STUDY**

**PARTICIPANT INSTRUCTIONS**

1. You have 10 minutes to review the case.
2. Presentation time is five minutes. At four minutes the timekeeper will stand and hold up a card indicating one minute is left and at five minutes the timekeeper will stand and hold up a colored card indicating time is up.
3. The presentation is interactive with the judges who will ask questions throughout the presentation. A judge will assume the role of an unhappy customer of Green Valley Health Insurance.
4. You (student) will play the role of the customer care representative for Green Valley Health Insurance.
5. Each participant will be given two note cards. The note cards will be collected following the performance.
6. Be prepared to answer questions posed by the judges.

**PERFORMANCE INDICATORS**

* Logical solution is selected and presented with positive and negative aspects of its implementation given
* Thoughts and statements are well organized and clearly stated; appropriate business language is used
* Ability to effectively communicate with customer
* Explain an effective, efficient, and spontaneous action for customer service
* Empower yourself to give efficient, accountable customer service
* Exhibits good decision-making and problem-solving skills

**CASE STUDY SITUATION**

You are a Customer Care Representative for Green Valley Health Insurance, an international health insurance provider. You handle customer inquiries, questions, and complaints.

Green Valley has been in business since 1950, and like most companies, has had to reduce its workforce due to the economy. As a result, everyone in the Customer Care center has been told that they must operate more efficiently, especially with handling customer calls.

You are authorized to offer up to $100 if it will resolve the issue and satisfy the customer. Your challenge is to determine an equitable solution that will be acceptable to the customer and to your company.

You will be fielding a call from a customer (judge). You should “answer the call” with the following greeting:

*“Green Valley Health, this is \_\_\_\_\_ (your name). How may I help you?”*



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**JUDGES’ NOTES**

**JUDGING THE PRESENTATION**

1. This is a role-playing event with one judge assuming the role of an unhappy customer of Green Valley Health Insurance.
2. Review the Judges’ Instructions and the Case Study Situation. One judge will assume the customer role or each judge may vary the problem and ask questions. If all judges ask questions, consider it a family that quite a few concerns. Remember, what you do for one presentation, must be done for all presentations.
3. After introductions, you need to explain the reason for the call and ask for some action to resolve the problem.
4. This is an interactive problem, so treat the presentation as a conversation. Time allowed is five minutes.
5. You will close the event.
6. Complete the rating sheet.

**JUDGES’ INSTRUCTIONS**

In this performance, the judge will assume the role of an unhappy customer of Green Valley Health Insurance.

You have had a family health insurance policy with Green Valley for over five years. When you first purchased your policy, you signed up for automatic bank draft to pay your monthly premiums.

When you were relocated to another city, you telephoned Green Valley to make certain that your coverage would still be effective and gave Green Valley your new address. You opened a new bank account in the new city, and with all of the preparations for the move and unpacking in your new house, you forgot to set up the bank draft for the insurance policy.

Three months later, you receive a Notice of Cancellation of your policy. You had thought you were covered the entire time and that payments were being drafted from your account. When you looked at the envelope, you realized it had a forwarding address label on it from your last address.

While you accept responsibility for not updating the bank draft information, you want to know why Green Valley had not updated your address in the system when you called prior to the move. Had they updated their records, you would have received past due notices for payment on your policy and realized you needed to set up the monthly bank draft.

You call the Customer Care toll-free number. You want your coverage reinstated at no penalty to you and you expect Green Valley to pay for all medical and prescription expenses incurred during the past three months as described in the terms of your policy.