# Service Excellence - Customer Experience Guidelines and Expectations

[Guidelines and Expectations](#_Toc196809293)

[Unacceptable Behaviors](#_Toc196809294)

[Related Documents](#_Toc196809295)

**Description:** Customer Experience guidelines and expectations for our colleagues to follow. We strive to ensure everyone (**Examples:** Plan members, clients, internal business partners and peers) is highly satisfied with the experience provided to them by our colleagues.

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| Guidelines and Expectations |

Our expectation is that all colleagues will enhance the Customer Experience by:

* Responding to the caller using their preferred name or first and last name. Do not use Ma’am, Sir, Ms., Mr., Mrs. etc. unless the caller specifically requests you do so.
* Demonstrating respect, courtesy, empathy, and accountability.
* Ensuring customer safety and confidentiality by appropriately authenticating callers. This includes attempting to access an account during each interaction.
* Own resolving issues or concerns, when possible, on the first contact.   
  **Examples:**
* Reaching out to local pharmacies to assist with issue resolution.
* Ending each call with a resolution question, such as, “Have I fully resolved the reason for your call?”
* Pro-actively educating members on the most effective use of their benefit.
* Providing a hassle-free experience.   
  **Examples:**
* Responding to the member’s need with positive, definitive support statements, such as, “Yes, I can help!”
  + ****The Reassurance Statement is meant to provide the member with the confidence and assurance that we are going to help. Reassure the caller that they have reached the correct person to assist and resolve their inquiry. You are reassuring the caller and stating “I am the right person to help you.”
  + ****Say the Reassurance Statement at the right time:
    - After the caller has explained the reason for their call
    - Reassure the member with a positive “I can help” statement
    - Say it with confidence; your tone matters just as much as your words

****Examples of Reassurance Statements:

* Absolutely, I’ll be happy to assist
* I can definitely help you with your drug coverage question…
* Yes, I can help you with your refill…

**Note:** Reassurance Statements do not need to be verbatim; however, they should include both a positive affirmation and an assurance of our ability to assist the member.

* As a best practice: Elevating the MEMBER Experience can be accomplished by elevating the Reassurance Statement:
  + “Absolutely! I can help you with your refill for <medication>.”
  + “I am happy to help you with your drug coverage question for <medication>.”
  + **** Attempting to provide a clear Summary/Recap before ending each call.
* REASON: Include why the Member called (when appropriate/when applicable)
* ACTION/INFORMATION SHARED: The information you provided to the caller
* RESULTS – NEXT STEPS/TAT: What was done for the Member and the turnaround time (i.e., New RX Request, EPA Request, etc.).
* Providing accurate information while utilizing the CIF and appropriate work instruction. Each call is required to utilize the appropriate work instruction based on the call type.
* Completing member requests before closing the call.

[Top of the Document](#_top)

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| Unacceptable Behaviors |

 In addition to the expectations listed above, and those identified in the Colleague Handbook (viewable on [ColleagueZone](https://colleaguezone.cvs.com/$viewer.do?sysparm_stack=no&sysparm_sys_id=5fcefa702bc8aa9058bbf138ce91bfdd) and the [Policy and Procedure Portal](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=HR-049558)), we expect our Colleagues to refrain from engaging in any behavior that does not support a positive Member Experience.

In that regard, the **following conduct is unacceptable** and will lead to corrective action, up to and including termination.

 The following behaviors are inclusive when interacting with the customer on the phone or via email/chat, during hold times, or documenting within any PBM system.This extends to all electronic communication tools such as email or chat functions.

* Avoiding calls, including but not limited to:
* Cold transferring a member to an internal department without authorization or to the Senior Team for any reason.
* Disconnecting or hanging up on a caller at any point during a call.
* Failing to greet the caller immediately when the line goes live.
* Failing to release the line when transferring a call, unless asked to stay on the call.
* Failing to release the line after closing the call (aka Hang Out Time).
* Failure to be in the appropriate AUX state to take calls.
* Inefficient call management (**Example:** Excessive non-business conversation during the call. This does include, but is not limited to, Microsoft Teams chat).
* Placing a member on an excessive hold (as outlined in business appropriate work instructions).
* Avoiding action such as choosing not to assist a caller or being resistant in offering a caller help or resolution which includes, but is not limited to, the refusal to escalate the call to the next level when appropriate or specifically requested.
* Delivering misleading, false, or information that cannot be substantiated.
* Demonstrating rude, inappropriate, unprofessional, or offensive behavior which includes cursing, mocking, patronizing or belittling anyone, shortness of response (curt or abrupt), rendering personal opinion, using negative voice inflection, consistently interrupting or talking over others, or minimizing the seriousness of the issue (brushing off).
* Failure to keep commitments that have been made.
* **Callbacks to Members:** If a callback to the member is required, identify who will call the member back and when they should expect that communication.

**Example:** Our pharmacy will call you back within 10 business days or you will receive an automated call regarding your request within 10 business days.

* Lack of active listening, engagement, and/or fully utilizing all tools and resources to resolve the caller’s inquiry on the first contact.
* Completing account changes/fulfillment requests after a call is released. Changes to a member’s account should only be made with the fully authenticated caller on the line, or when directed by leadership.
* **Do not**provide your email or send emails to members or other callers.
* For additional reference on what information you can provide on a call, refer to [Compass - Requests for Representative's Name, ID, Location, Or Call Reference Number (068256)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=65e9d0fd-2937-4aad-879a-e50f2482eec2).

**** The Company reserves the right to bypass disciplinary steps and base its corrective action on the severity, frequency, or combination of infractions when circumstances warrant immediate action.

[Top of the Document](#_top)

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| Related Documents |

[Compass - Requests for Representative's Name, ID, Location, Or Call Reference Number (068256)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=65e9d0fd-2937-4aad-879a-e50f2482eec2)

**Parent Document:** [HR-049558 CVS Health Colleague Handbook](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=HR-049558)

[Top of the Document](#_top)

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