|  |
| --- |
| **Introduction** |

Hello, this is ( Interviewer Name ) calling from SQM Group on behalf of CVS on a recorded line. May I please speak to ( Customer Name )?

|  |  |
| --- | --- |
| * Yes, speaking, or a different person * *Continue with survey* | * No * *Thank and end call* |

***If continuing to speak to the original person who answered the phone***

Hello, SQM Group is an independent customer experience research firm. CVS has asked us to gather feedback about their call center customer service. This call is being recorded and may be monitored for quality purposes. Your feedback will help CVS improve the service they provide.

***If continuing to speak with a person who DID NOT originally answer the phone***

Hello, this is ( Interviewer Name ) calling from SQM Group, an independent customer experience research firm. CVS has asked us to gather feedback about their call center customer service. This call is being recorded and may be monitored for quality purposes. Your feedback will help CVS improve the service they provide.

Are we calling you while you are driving?

|  |  |
| --- | --- |
| * Yes * I’m sorry but for safety reasons, we cannot continue with the survey, but we thank you for taking the call and wish you a good day. *(End survey)* | * No * *Continue with survey* |

May I ask you some questions about your call ( Call Date )? It can take as little as 3 minutes.

|  |  |
| --- | --- |
| * Yes * *Continue with survey* | * No/Refused * *Thank and end call* |

Thank you, we really appreciate the opportunity to get your feedback.

Contact Reason

1. What was the main reasonfor your call to CVS’ call center? Would you say… \*

|  |
| --- |
| * To ask about a payment or bill |
| * To place an order (refill or new prescription) |
| * To check on an order status |
| * To respond to a voicemail, email, or letter |
| * To ask a question about the website or app |
| * Other (Do not read, please describe) |

|  |
| --- |
| **Satisfaction/First Call Resolution** |

Contact Channel Csat

Based on your last call to their call center, overall, how satisfied are you with CVS’ call center? Would you say you are… \*

|  |  |
| --- | --- |
| * Very Satisfied | * Somewhat Dissatisfied |
| * Somewhat Satisfied | * Very Dissatisfied |

Likely to Recommend

1. Blue Cross Blue Shield of Massachusetts has partnered with CVS to provide your pharmacy benefit. Based on your most recent experience with the pharmacy call center, using a scale of 0 to 10, where 0 means “Not at All Likely”, and 10 means “Extremely Likely”, how likely are you to recommend Blue Cross Blue Shield of Massachusetts to a friend or colleague? *(TSR does not read options, select customer’s response) \**

|  |  |
| --- | --- |
| * 10 – Extremely Likely | * 4 |
| * 9 | * 3 |
| * 8 | * 2 |
| * 7 | * 1 |
| * 6 | * 0 – Not at All Likely |
| * 5 | * Don’t Know |

Recommend Feedback - *TSR recorded feedback – transcribed*

1. Please explain why you gave that rating.

Contacts Resolved

1. Did CVS’ call center resolve your inquiry? Would you say… \*

|  |  |
| --- | --- |
| * Yes *(Go to question 7a)* | * No *(Go to question 6)* |

***Ask if: Contacts Resolved = No***

Future

1. Will you call CVS again in the near future to get the same issue resolved? Would you say… \*

|  |  |  |
| --- | --- | --- |
| * Yes | * No | * Not sure (Do not read) |

***Ask if: Contacts Resolved = Yes***

Number of Contacts

7a. In total, how many calls did you have to make to CVS’ call center to resolve your initial inquiry? Would you say… \*

|  |  |
| --- | --- |
| * 1 call *(Go to question 9a)* | * 4 or more calls |
| * 2 calls *(2 or more calls, go to question 8a)* | * Not sure (Do not read) |
| * 3 calls |  |

***Ask if: Contacts Resolved = No***

Number of Contacts

7b. In total, how many calls have you made to CVS’ call center trying to resolve the reason for your initial inquiry? Would you say… \*

|  |  |
| --- | --- |
| * 1 call | * 4 or more calls |
| * 2 calls | * Not sure (Do not read) |
| * 3 calls |  |

***Ask if: Number of Contacts (question 7a) ≠ 1 call***

Repeat Contacts – Call Center Feedback - *TSR recorded feedback - transcribed & tagged*

8a. Can you tell me why your inquiry was not resolved in one call?

***Ask if: Contacts Resolved = No***

Repeat Contacts – Call Center Feedback - *TSR recorded feedback - transcribed & tagged*

8b. Why did the call center not resolve your call?

***Ask if: Contacts Resolved = Yes***

Effort

9a. How much effort did you personally have to put forth to resolve your inquiry? Would you say…

|  |  |
| --- | --- |
| * Very high effort | * Low |
| * High | * Very low effort |
| * Moderate |  |

***Ask if: Contacts Resolved = No***

Effort

9b. How much effort did you personally have to put forth trying to resolve your inquiry? Would you say…

|  |  |
| --- | --- |
| * Very high effort | * Low |
| * High | * Very low effort |
| * Moderate |  |

Hold

1. When you were talking to the customer representative, were you placed on hold? Would you say…

|  |  |
| --- | --- |
| * Yes | * No |

Transferred

1. During your call, did the customer representative transfer your call? Would you say… \*

|  |  |
| --- | --- |
| * Yes *(Go to question 11a)* | * If no, press 2 *(Go to question 12)* |

***Ask if: Transferred = Yes***

Transferred To

11a. Was your call transferred to a supervisor or to another area? Would you say… \*

|  |
| --- |
| * A supervisor *(Go to Script A)* |
| * Another area *(Go to question 11b)* |

***Ask if: Transferred To = Another area***

Area Transferred To

11b. What area were you transferred to? Would you say… \*

|  |
| --- |
| * A Pharmacist *(Go to Script B)* |
| * Blue Cross Blue Shield of Massachusetts *(Go to Script B)* |
| * Another representative at CVS *(Go to Script A)* |
| * Other (TSR to read, please describe) *(Go to Script A)* |

***Read if: Transferred = Yes, Transferred To = A supervisor, or Area Transferred To = Another representative at CVS or Other***

***Script A*** - For the next question it is very important that your rating choice is based on the last customer representative that you spoke to.

***Read if: Area Transferred To = A Pharmacist or Blue Cross Blue Shield of Massachusetts***

***Script B*** - For the next question it is very important that your rating choice is based on the first customer representative that you spoke to.

CSR Csat

Overall, how satisfied were you with the customer representative who handled your call? Would you say you are… \*

|  |  |
| --- | --- |
| * Very Satisfied | * Somewhat Dissatisfied |
| * Somewhat Satisfied | * Very Dissatisfied |

CSR Csat – Call Center Feedback – *TSR recorded – transcribed & tagged*

1. Why are you ( CSR Csat Rating ) with the customer representative who handled your call?

|  |
| --- |
| **One Contact Resolution Section** |

Use Another Method of Contact – CS Point

1. Did you try to resolve your inquiry by contacting CVS in any other way, such as their website, email, or online chat? Would you say… \*

|  |
| --- |
| * Yes, before you called the call center |
| * Yes, after you called the call center |
| * No, you only used the call center *(Go to question 15)* |
| * Don’t Know (Do not read) *(Go to question 20)* |

***Ask if: Use Another Method of Contact = No, you only used the call center***

MC Attempt Feedback – *TSR recorded feedback – transcribed – TSR selects best option based on customer’s response*

1. Can you please explain why you chose to use the call center instead of another method of contact to attempt to resolve your inquiry? *(TSR does not read options, select based on customer’s response)*

|  |
| --- |
| * Call center is quickest/easiest method |
| * Internet was not working |
| * Instructed to phone the call center |
| * Prefer speaking with someone |
| * Inquiry was too complicated or required explanation |
| * Don’t have a computer |
| * Don’t have a smartphone |
| * Don’t know how to use the website or automated phone system |
| * Can’t get to branch/store |
| * Website/phone system didn’t address the inquiry |
| * Didn’t know the other contact methods were available or could help |
| * Other (Please describe) |

*Go to question 20*

***Ask if: Use Another Method of Contact = Yes, before you called the call center***

First-Other Method of Contact

16a. What was your first method of contact? Would you say their… \*

|  |
| --- |
| * Website * Automated phone system * Email * Mobile app * Social media |
| * Another contact method (TSR to read, please describe) *(Reference value = other contact method)* |

***Ask if: Use Another Method of Contact = Yes, after you called the call center***

First-Other Method of Contact

16b. What was yourother method of contact? Would you say their… \*

|  |
| --- |
| * Website * Automated phone system * Email * Mobile app * Social media |
| * Another contact method (TSR to read, please describe) *(Reference value = other contact method)* |

***Ask if: Use Another Method of Contact = Yes, before you called the call center AND First-Other Method of Contact = Website, Automated phone system, Mobile app, or Social media***

First Resolve – Call Center Feedback – *TSR recorded feedback – transcribed & tagged*

17a. Please explain why you were not able to resolve your inquiry using their ( First-Resolve Method of Contact Response )before you called the call center.

***Ask if: Use Another Method of Contact = Yes, before you called the call center AND First-Other Method of Contact = Email or Another contact method***

First Resolve – Call Center Feedback – *TSR recorded feedback – transcribed & tagged*

17b. Please explain why their ( First-Resolve Method of Contact Response )did not resolve your inquiry before you called the call center.

***Ask if: Use Another Method of Contact = Yes, after you called the call center***

First Resolve – Call Center Feedback – *TSR recorded feedback – transcribed & tagged*

17c. Please explain why you were not able to resolve your inquiry using the call center and had to use their ( First-Resolve Method of Contact Response ).

***Ask if: Use Another Method of Contact = Yes, before you called the call center or Yes, after you called the call center***

Different Contact Methods Sat

1. Thinking about your entire experience using the different methods of contact to resolve your inquiry, what is your overall level of satisfaction? Would you say you are…

|  |  |
| --- | --- |
| * Very Satisfied | * Somewhat Dissatisfied |
| * Somewhat Satisfied | * Very Dissatisfied |

***Ask if: Use Another Method of Contact = Yes, before you called the call center or Yes, after you called the call center***

Seamless Experience

1. When you used more than one contact method trying to resolve your inquiry, did you have to start your interaction over again or was it a seamless experience? Would you say… \*

|  |
| --- |
| * You had to start over |
| * It was a seamless experience |
| * Don’t Know (Do not read) |

Core

Thinking about your entire relationship that you have with CVS, what is your overall level of satisfaction with CVS? Would you say you are… \*

|  |  |
| --- | --- |
| Very Satisfied | Very Dissatisfied |
| Somewhat Satisfied | Don’t Know (Do not read) |
| Somewhat Dissatisfied |  |

Contact Member Service

Did you happen to also contact Blue Cross Blue Shield of Massachusetts’ member service regarding your same inquiry? Would you say…

|  |  |
| --- | --- |
| * Yes | * If no |

Your feedback is very much appreciated. Again, thank you.

|  |
| --- |
| **Survey Business Rules and Definitions** |

\*Red asterisk indicates mandatory questions.

All surveys are Attributable

Survey Used = Medicare

Channel Timing Before After

* If Use Another Method of Contact = Yes, before you called the call center, then Channel Timing Before After = Before
* If Use Another Method of Contact = Yes, after you called the call center, then Channel Timing Before After = After
* If Use Another Method of Contact = No, you only used the call center or Don’t Know, then Channel Timing Before After = BLANK

First Channel

* If Use Another Method of Contact = Yes, before you called the call center, then First Channel = First-Other Method of Contact response
* If Use Another Method of Contact = Yes, after you called the call center, then First Channel = Call Center
* If Use Another Method of Contact = No, you only used the call center or Don’t Know, then First Channel = Call Center

**Survey Description** – *Live Call Center Tracking Survey* - survey based on an inbound call center interaction between a customer and CVS.

|  |
| --- |
| **KPIs** |

|  |  |
| --- | --- |
| KPI | Definition |
| First Contact Resolution | Contacts Resolved = Yes and Number of Contacts = 1 call |
| Contacts Resolved | Contacts Resolved = Yes |
| Average Contacts to Resolve | Average number of calls made to resolve inquiry |
| Action Alert Contacts | Contacts Resolved = No and Contact Channel Csat = Somewhat Dissatisfied or Very Dissatisfied |
| World Class Contacts – Org | Contacts Resolved = Yes, Contact Channel Csat = Very Satisfied and CSR Csat = Very Satisfied |
| World Class Contacts - CSR | Contacts Resolved = Yes and CSR Csat = Very Satisfied |
| Contact Channel Csat | Contact Channel Csat = Very Satisfied |
| CSR Csat | CSR Csat = Very Satisfied |
| One Contact Resolution | Contacts Resolved = Yes, Number of Contacts = 1 call and Use Another Method of Contact = No |
| Omni-Channel Experience | Different Contact Methods Sat = Very Satisfied and Seamless Experience = It was a seamless experience |
| Seamless Experience | Seamless Experience = It was a seamless experience |
| Net Promoter Score | Promoters – Likely to Recommend = 10, 9  Passives – Likely to Recommend = 8, 7  Detractors – Likely to Recommend = 6, 5, 4, 3, 2, 1, 0 |
| Enterprise-Wide Csat | Core = Very Satisfied |
| Multiple Channel Csat | Different Contact Methods Sat = Very Satisfied |
| Effort | Effort = Very Low Effort |
| Transferred | Transferred = Yes |
| Hold | Hold = Yes |
| Future | Future = Yes |
| Contact Member Service | Contact Member Service = Yes |

|  |
| --- |
| **Tagging Tables** |

**Repeat Contacts**

|  |  |  |
| --- | --- | --- |
| Tier 1 | Tier 2 | Source of Error |
| Claims | Incorrect | Organization |
| Corrections Not Done | CSR/Org |
| Payment Related | Cust/Org |
| Bill/Statement Unclear | Organization |
| Explain Charges | CSR |
| Call Center | Call Center/Closed | Organization |
| Wait Time to Reach CSR Too Long | Organization |
| Busy Signal | Organization |
| Computer System Not Working | Organization |
| Call Back/Again | Organization |
| CSR Approach | CSR Did Not Call Back | CSR |
| Not Helpful/Caring | CSR |
| CSR Lacked Authority | CSR/Org |
| No Confidence in CSR | CSR |
| Rude | CSR |
| Customer | Needed to Provide More Information | Customer |
| Customer Missed Call Back | Customer |
| Error | Customer |
| Decision/Changed Mind | Customer |
| Call Length | Hold - Customer was Disconnected | CSR/Org |
| Hold - Too Long | CSR/Org |
| Call - Too Long | CSR/Org |
| CSR Knowledge | Lack of Knowledge to Fix Problem | CSR |
| Not Aware of Promo | CSR |
| Lack of Knowledge Products/Services | CSR |
| CSR Information | Inconsistent Info | CSR |
| Incomplete Info | CSR |
| Incorrect Info | CSR |
| IVR | Language Issue | Organization |
| Not Clear/No Proper Options | Organization |
| IVR Did Not Recognize Customer Voice | Organization |
| Too Many Options | Organization |
| Disconnected | Organization |
| Wrong Dept | Organization |
| Language | Barrier - Customer | Customer |
| Barrier - CSR | CSR |
| Policy | Not Authorized User | Cust/Org |
| Credit | Cust/Org |
| Policy Disagreement | Cust/Org |
| Verifying/Request | Needed to Verify/Check Status | Organization |
| Request Not Done | CSR/Org |
| Resolution | Unsatisfactory Solution | CSR |
| Customer Was Not Treated Fairly | CSR/Org |
| Next Steps Not Clear | CSR |
| Redirection | To/from Health Provider | Organization |
| To/from Employer | Organization |
| To/from Internet | Organization |
| To/from Other | Organization |
| Products/Services | Health Provider Did Not Fix Problem | Organization |
| Not Satisfied with Product/Service | Organization |
| Other | Any Issue Not Covered | Other |
| No Feedback | Other |

**CSR Csat – Call Center**

|  |  |
| --- | --- |
| Tier 1 | Tier 2 |
| Understand Me | Understand Reason for Call |
| Clarity |
| Listening |
| Language |
| Help Me | Helpful |
| Knowledge |
| Call Length |
| Confidence |
| Transfer |
| Sales |
| Care About Me | Greeting |
| Build Rapport |
| Empathy |
| Appreciation |
| Live Hold |
| Trust |
| Resolve Me | Resolution |
| Authority |
| Ownership |
| Fair Treatment |
| Summarizes Call |
| Follow Through |
| Next Steps |
| Confirming Resolution |
| Customer Satisfaction |

**First Resolve - Call Center**

|  |  |  |
| --- | --- | --- |
| Tier 1 | Tier 2 | Source of Error |
| Useability | Difficult to use/Too complicated | Org |
| Took too long to complete transaction | Org |
| IVR voice quality not clear | Org |
| IVR did not recognize customer voice | Org |
| Handling | Did not handle transaction/Option not available | Org |
| Disconnected/Session timed out | Cust/Org |
| Redirection to/from channel | Org |
| Wrong department | Org |
| Not authorized user | Cust/Org |
| Policy issue | Cust/Org |
| Functions | Search function not working properly | Org |
| Print function not working properly | Org |
| Wouldn’t accept password/Password problems | Org |
| Technical issue | Org |
| Availability | System not working/Site down | Org |
| Directed to contact again/back | Org |
| Contact channel not available/closed | Org |
| Information | Could not find information/Not available | Org |
| Channel didn’t provide enough information | Org |
| Information incorrect/not updated | Org |
| Information inconsistent | Org |
| Response took too long/No response received | CSR/Org |
| Resolution | Unsatisfactory Solution | Org |
| Customer was not treated fairly | CSR/Org |
| Next steps not clear | CSR/Org |
| Verify/Request | Customer needed to verify/check status | Org |
| Request not done | CSR/Org |
| Verification Not Sent | CSR/Org |
| Customer | Customer needed to provide more info | Cust |
| Customer changed mind | Cust |
| Customer error | Cust |
| Customer wanted to talk to a CSR | Cust |
| Customer had the wrong password/Forgot password | Cust |
| CSR Approach/Knowledge | Not helpful/Caring | CSR |
| CSR lacked authority | CSR/Org |
| No confidence in CSR | CSR |
| Rude | CSR |
| Lack of knowledge to fix problem | CSR |
| Lack of knowledge of products/services | CSR |
| Other | Any issue not covered | Other |
| No feedback | Other |