



Case Study: Medicare Advantage Part D Open Enrollment

In January 2006, the U.S. Center for Medicare and Medicaid Services (CMS) allowed approved health plans to begin offering Medicare Prescription Drug coverage plans, known as Medicare Part D to Senior Citizens and other Medicare eligible populations. This was a new and complex Medicare Plan and many Health Insurance companies and Prescription Drug Plan Providers were forced to scramble to compile offerings for meeting a myriad of requirements and identify methodology to communicate the complexity of these offerings clearly and effectively to a senior demographic. After the enrollment period ended in May of 2006, most providers realized that they had scarce time to re-tool before the next enrollment season began with plan advertising launching in October 2006, and enrollments beginning in November 2006. In addition to the confusion in the market place regarding plan usage and benefits, there was fierce competition as suppliers organized their strategy for a huge land-grab during the limited marketing window sanctioned by CMS known as Open Enrollment.

Synergy Solutions had developed a core specialization in the area of offering call center support to the senior market prior to the launch of Part D. Synergy had played an active role in offering customer care and enrollment services for the predecessor to Part D –the Medicare Prescription Discount Card and served as the primary enrollment arm for over 200,000 beneficiaries. Synergy expanded on this experience to develop a cadre of call center support services for the Medicare market and developed key relationships with both Medicare Advantage

(MA) Providers and Prescription Drug Providers (PDP) who were competing for Part D market-share. Synergy has been very successful at leveraging its expertise in scalable call center operations across many industries to provide a viable solution for Medicare call center support. We developed senior sensitivity training modules and enforce our stringent quality assurance standards to ensure our Customer Contact Representatives use appropriate call management techniques to deliver superior service to callers. Synergy allocated additional capacity, infrastructure, management support and dynamic technology to support the increased need for call centers to provide beneficiary education and enrollment support for Part D and other Medicare products. Additionally, Synergy utilizes its active network of licensed insurance agents capable of Part D enrollments and the sale of Medicare Supplemental products. Synergy's demonstrated experience in offering programs in English and Spanish and managing, call spikes while providing quality contact with seniors and meeting all service level requirements earned it the trust of its clients who were preparing for another season of Open Enrollment in Q3 2006.

As Synergy developed its core expertise in the area of Medicare Marketing, it began a relationship with a large regional health plan that offered Medicare products in 41 states. Synergy's initial launch with this plan involved utilizing licensed insurance agents to conduct lead generation outbound calling. During this pilot program, Synergy was able to demonstrate its skills and commitment to quality and consequently was given the opportunity to partner with this client on an integrated inbound and outbound program desired to reduce customer erosion during the mass marketing window associated with Part D as well as increase customer loyalty through proactive benefits education.

Quality was paramount to this client as this program not only represented their brand to their potential customers in the market place but also served to be the

face of the company with their current plan members. This client had utilized the teleservices channel for lead generation but had never outsourced any call center interaction with its current plan members prior to this program. Key attributes required of Synergy were professionalism, senior sensitivity, a demonstrated commitment to compliance and data privacy, script adherence and accuracy of data entry, a strong disaster recovery plan in the event that calls would need to be diverted, the ability to blind monitor agents, a robust methodology for internal monitoring, a commitment to quality training and coaching of agents and a strong history of client satisfaction. After a thorough evaluation and RFP process, Synergy was chosen based on their ability to excel in all of the above categories and the proactive manner in which they had managed the outbound pilot program.

The complex program involved Synergy providing both inbound and outbound live agent call center pre-enrollment support for the client's Part D initiatives. The multi-channel program involved:

- ❖ Accepting inbound calls from the client's prospects that were generated from direct mail, TV and other forms of media advertising. The objective was to collect basic contact information and register prospects for a health seminar.
- ❖ Accepting inbound calls from current customers who received a direct mail piece outlining their current plan benefits. The objective was to collect information on the customer's level of satisfaction and current insurance coverage as well as register them for a health seminar.
- ❖ Make outbound calls to customers as a follow up to a direct mail piece sent to them. The objective of the call was to create customer loyalty and

promote retention by assessing their current level of satisfaction as well as register them for a local health seminar. All outbound calling was completed daily by 7:00pm market time daily in deference to the senior demographic being called.

Synergy agents accessed a robust appointment scheduling application that was built by Synergy and managed to a quota by location for scheduling of seniors who agreed to attend an informational meeting in 41 separate local areas. In addition to scheduling both customers and prospects, Synergy placed courtesy reminder calls in advance of every appointment. Synergy built the technology platform to allow for the reservations made on its scheduling tool to automatically route to a customer outbound program for a reminder call that was triggered by the seminar date. All reminder calls were made between 24 - 48 hours in advance of the scheduled seminar. Synergy agents had the ability to modify an appointment date during the reminder call.

Synergy demonstrated its flexibility and commitment to customer service during the design and launch of this complex program in a truncated time period. Synergy was able to build the custom technology, procure appropriate toll free numbers, develop a forecast and staffing plan, and offer a flexible staffing model to meet the needs of its client. Synergy staffed this program with dedicated agents for outbound and dedicated inbound agents during hours of peak activity. Due to CMS requirements, Synergy needed to have resources available to handle inbound calls between the hours of 8am – 2am EST 7 days per week. Because of the limited volume of calls from seniors during the peripheral hours, Synergy worked with this client to augment their dedicated staffing model with shared agents during peripheral coverage hours.

Synergy assigned a Senior Program Manager to provide program oversight and analysis and the Program Manager accompanied the Client to the selected Synergy Call Center for the training and program launch. Initially, Synergy participated in two client attended remote monitoring sessions per day to ensure that it met the highest standards of quality. After some initial adjustments were made to the scripting the Client was so pleased with Synergy's quality that they reduced the number of remote monitoring sessions from two per day to three per week. Synergy of course maintained its rigorous internal monitoring schedule throughout the program.

The inbound portion of the program is still active and will run through the enrollment period concluding at the end of March 2007 Client feedback has been very positive as Synergy has been able to exceed client performance goals, generate high attendance at the seminars and interact professionally with customers and prospects. Because of the success with the outbound program and the higher than expected number of confirmed seminar appointments, the client actually extended the calling window beyond the original scope of the Agreement. Synergy's scheduling tool worked quite effectively and allowed the client to maximize attendance at each seminar and our coordinated outbound reminder program ensured a high level of actualized reservations. Additionally, all compliance requirements were met and CMS service levels adhered to.

We received this feedback from our primary contact point at the client company:

"Great Job! I wanted to share some good news with you about the overall success of the program. We had a conference call with the market managers today to touch base about the seminars and the managers are very happy with the success of the seminar invitations to customers and prospects. They reported a good turnout at the seminars and they said the Synergy

representatives are doing a good job at sending happy customers. Having the happy customers mingling with the prospects has increased sales and kept morale high among the sales agents. We appreciate all you and the rest of the staff have been doing toward this program.”



Synergy Solutions, Inc.
16435 N. Scottsdale Rd., Suite 130
Scottsdale, AZ 85254
Phone: 602-296-1600
Fax: 602-296-1695
www.synergysolutionsinc.com