

Listening Strategy & VOC Program Development Case Study



Integrated payer/primary healthcare provider implements first-ever VOC program

Background and Objectives

A large regional payer with a network of integrated primary care sites asked BCE to help the organization execute on an emerging strategy to become more patient- and member-centric in its approach to decision-making. The first frontier along this journey was outlining a listening strategy to guide “where,” “when,” and “how” to collect feedback from insurance plan members and primary care patients. With this listening strategy developed, BCE’s client also needed support developing a VOC program to execute on the new feedback collection framework and analyze monthly results to the executive team in customer-centered decision-making.

Approach

BCE began the engagement by interviewing key internal stakeholders across the organization to better understand foundational member/patient dynamics, including existing touchpoints with the each line of business, particular elements of friction or delight among those interactions, along with frequency, volume, and “criticality” to the business. BCE also worked to better understand internal customer engagement capabilities like CRM, existing feedback collection practices, and the revenue distribution across lines of business. With the client’s perspectives on current-state defined through these interviews, BCE then analyzed three years’ worth of existing member and patient feedback to complement its analysis of the “state-of-the-customer.”

Based on this internal mapping exercise, BCE identified key opportunities across the spectrum of member and patient experiences to both proactively solicit and passively allow feedback collection. BCE outlined these opportunities in terms of “crawl,” “walk,” and “run” capabilities, highlighting moments across customer experiences where the client could begin collecting feedback most quickly/easily versus more advanced and sophisticated mechanisms of feedback collection.

Finally, BCE created a custom survey that could be deployed regardless of experience type or client’s line of business to facilitate comparison and action across the organization. BCE developed a corresponding KPI dashboard to house customer feedback and visualize trends in the feedback KPIs over time, with the objective of speeding time to insight, action, and continuous improvement in the organization. As an output of this engagement, BCE now collects, analyzes, and reports on the feedback collected through the organization’s VOC program on a monthly basis.

Recommendations

Leveraging the listening framework developed during the project, BCE recommended a comprehensive set of “customer moments” in which to direct the organization’s feedback collection efforts and a phased approach to enabling these listening mechanisms over a three year period (“crawl,” “walk,” “run”). In generating the monthly VOC analysis on behalf of the organization, BCE has also developed new insights that have led to recommendations supporting enhancements to online member/patient portals, new contact center handling protocols, and patient experience improvements.

| | CLIENT LISTENING STRATEGY | | | | | | | | |
|---------------------|---------------------------|---------------------------------------|---------------------------|----------------------|---------------------------|----------------------------|--------------------------------------|-----------------------------|-----------------|
| | ADVERTISING ENCOUNTER | PROSPECTIVE CUSTOMER ONLINE EDUCATION | PHONE CALL WITH SALES REP | ATTEND SALES SEMINAR | NEW CUSTOMER INTRODUCTION | ONGOING ORAL COMMUNICATION | CUSTOMER ENGAGED EMAIL COMMUNICATION | ONGOING PHONE COMMUNICATION | W/PERSON VISITS |
| Business Line One | 2 | 2 | 1 | 1 | 2 | 1 | 1 | 1 | N/A |
| Business Line Two | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | N/A |
| Business Line Three | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |

DEFINITIONS / RATIONALE

Green

- Clear customer pain points coupled with critical convergence of Client volume/service + revenue drivers
- Relatively straightforward path to soliciting customer feedback through existing mechanisms/channels
- Least resistant to capture survey feedback from ongoing customer interactions, then capture feedback from “heavily acquired” through New Customer Welcome Kit

Yellow

- Critical prospect/customer feedback zone, but more difficult or complex survey methodology required to enable VOC

Grey

- Feedback mechanism represents most mature manifestation of VOC program (in terms of tools and Client organizational capabilities)
- And/or lower immediate priority to collect feedback in this area either given lack of clear customer friction today or low organizational importance

PHASE 1 | **PHASE 2** | **PHASE 3**

BCE recommends focusing initial VOC listening efforts around existing customers at “New Customer Welcome” and “Ongoing Communication” phases

Relatively simple deployment of survey links in existing Customer communication points can be complemented by more complicated training of call center staff to record survey data directly

| CLIENT LISTENING STRATEGY (ACROSS LINES OF BUSINESS) | | | |
|---|--|--|---|
| PROSPECTIVE CUSTOMER | CUSTOMER SIGN-UP | CUSTOMER ONGOING COMMUNICATION | CUSTOMER USE SERVICES |
| <ul style="list-style-type: none"> CS Rep Captures Survey <ul style="list-style-type: none"> Reps ask a limited set of questions directly at the end of their calls (all or some subset, TBD) More seasoned/full-time reps are only ones directed to administer survey (either directly or as post-call follow-up) Reps ask for permission at end of call to follow up by phone and administer survey (calls are executed by a different set of reps, target sample size TBD) | <ul style="list-style-type: none"> Insert survey link in existing medium <ul style="list-style-type: none"> New Customer Welcome Kit (Email) New Customer Welcome Kit (Direct Mail) New Customer Welcome Kit (Both) Triggered surveys to known visitors <ul style="list-style-type: none"> Email Direct mail piece Both CS Rep Captures Survey <ul style="list-style-type: none"> (See “Prospective Customer”) | <ul style="list-style-type: none"> Insert survey link in existing medium <ul style="list-style-type: none"> Preventive measures mailer Quarterly Newsletters Mail/Email patient communication Triggered surveys to known visitors <ul style="list-style-type: none"> Email Direct mail piece Both CS Rep Captures Survey <ul style="list-style-type: none"> (See “Prospective Customer”) | <ul style="list-style-type: none"> Insert survey link in existing medium <ul style="list-style-type: none"> Printed flyers, signs, and other material at facilities |

Note: This approach can and should evolve as customer feedback is collected, directing Client attention to potential alternative areas of the customer journey

14 Client Proprietary