**2020 ATDKC Excellence in Practice Awards**

**Category: Learning and Development**

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| **Blue Cross Blue Shield’s Customer Advocate Training Program** |
| **Challenge:**  |
| At the end of 2018 Blue KC developed a new world class experience quality guide to align with a newly implemented call resolution delivery model. This guide changed the expectation of how our customer advocates should approach customer service. Traditionally, measuring the quality of customer service in the call center was focused on technical capabilities and accuracy as opposed to the level of service our customer advocates provided to meet and anticipate customer needs. Historically, the training program mirrored this trend by focusing nearly exclusively on technical skills and insurance knowledge. With the changing expectations for customer advocates, the training team not only had to revamp our largest new hire training program on an aggressive 3-month timeline, we also had to find a way to continually evaluate and update the training program to align with the call resolution delivery model as it continued to evolve throughout its implementation. Additionally, due to higher than average number of internal promotions in the call center, and changing call volume, the training team had to find a way to accommodate a much higher volume of learners throughout the year.  |
| **Action:**  |
| **Initial analysis uncovered the following:** • Content covered needed to be streamlined to focus on 4 key domains of knowledge: Customer Service Skills, System and Navigation, Benefits Research, and Claims Research. • Time allotted for practical application activities needed to be significantly increased while time allotted for traditional classroom lecture needed to be decreased. • Assessments needed to be developed to truly evaluate skills application as opposed to conceptual knowledge alone. • An evaluation program needed to be developed to determine if the new program was achieving the desired business results and identify opportunities for continual program improvement. A new program was designed/ developed and implemented: • We designed, developed and implemented 20 new or redesigned courses (~150 hours of content), that incorporated over 100 scenario based examples/ activities related to handling customer calls. • Learning materials were enhanced to incorporate more visuals and color. (previously materials were text-heavy and primarily black and white) • Content delivery was aligned to mirror the flow of the call resolution delivery model. • The new 9-week Customer Advocate program was administered 4 times throughout 2019. • Pre-Program implementation meetings were held before each learning program that outlined the key objectives and changes for each program. • Lessons learned meetings were conducted after each program to discuss successes and areas of opportunity for future programs. A new mock call process was implemented to enhance skills-based training: • 60+ Mock call scenarios were developed that allowed reps to practice their skills in a realistic, but non-member impacting manner while in training. • Roughly 45 hours of mock call time was added to the program resulting in 65 hours worth of skills-based training in the form of mock calls. • A process was created to recruit and coordinate 150+ helpers from various areas of the company to serve as mock callers throughout the numerous mock call sessions. A skills assessment process was created and implemented to evaluate learning: • 9 unique call scenarios were identified and built for the assessments • A standard assessment rubric was created that aligned to the new world class experience quality guide. • Students were formally assessed at 3 different points throughout the program by evaluating their ability to take 3 mock calls related to content covered in the previous week(s) against the newly designed rubrics. **An evaluation program was created using the following KPIs and data sources aligned to the Kirkpatrick Model:*** Level 4 (Results): # of employees trained (successfully graduated training program), Percentage of representatives achieving world class certification (assigned by external vendor). First Call Resolution (FCR), and Customer Satisfaction (CSAT).
* Level 3 (Behavior): On the Job Observations and Call Quality Scores
* Level 2 (Learning): Skills Assessment Performance (benchmark set at 80%)
* Level 1 (Reaction): Weekly smile sheet scores and post-training focus group feedback
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| **Result:**  |
| The revamp of the new hire customer advocate training program set out to create a training model that better aligned with and supported the new world class experience guide developed in the previous year. By conducting a thorough analysis, designing and developing a more engaging and skills-based program, and outlining an evaluation program that would help us identify success, we were able to obtain the following results: * The number of customer advocates we were able to accommodate and successfully train nearly doubled from the previous year (22 new hires in 2018 to 42 new hires in 2019)
* Even with the percentage of calls evaluated on newly trained reps doubling from 14% in 2018 to 29% in 2019, we maintained our high level of first call resolution at 75% (average industry standard of 69%) and CSAT of 89% (average industry standard of 77%) for both 2018 and 2019.
* 5% of eligible representatives achieved the world class certification in 2019. This was an increase from 66% of eligible reps in 2018.
* The training team looked at the quality for the first 4 weeks post-training to measure quality success. The 2019 new hires scored an average of 95.5% during their first 4 weeks post-training. A quality score of 92% or higher is considered meeting expectations from a performance perspective. (Due to the change in the quality form, we don’t have a way to accurately compare quality data between 2018 and 2019 new hires.)
* 45 students were evaluated using the assessments process: 95% of students evaluated received passing scores, with an average score achieved of 91.3% across all 4 programs.
* The customer service program achieved an average net promoter score of 78% for 2019.

In addition to the results listed above, the following lessons learned helped us continue to make improvements throughout the year and into 2020: * Based on learner feedback, we had a few consistency issues when it came to the way the content was delivered, and the key information that was shared. In response to this, we enhanced and reformatted the facilitation guides to make it easier on the trainers not only to prep for upcoming programs, but also increase the level of consistency in how the content was presented to the new hire groups.
* Due to the many moving pieces of the new hire training program (coordinating resources for training and mock calls, requesting systems access, administering assessments, etc.), we learned after the 1st program that we needed thorough program administration documentation. In response to this, program administration items were outlined and documented throughout 2019 and will be consolidated into an over-arching program administration guide by Spring of 2020.
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