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## **CASE STUDY: OPTIMIZE CALL SERVICE LEVELS AND REDUCE COSTS**

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**Industry:** Health Care Based Companies  
**Company Type:** A large managed care provider  
**Project Title:** Optimize call service levels and reduce costs  
**Tools Used:** Six Sigma DMAIC

**Project Timeline:** Three months

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### **PROBLEM STATEMENT**

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A large managed care provider found that their daily call service levels were not consistently meeting their goal of 60% of calls being answered within 45 seconds. Their staffing levels matched those determined by the validated staffing model based on current occupancies. The current productivity measure, Average Calls per Rep per Day (ACRD), was low for the current Average Handle Time (AHT), resulting in unnecessary administrative expense. At the time, their current Average Calls per Rep per Day was approximately 57. With current Average Handle Times of 5 minutes, reps had capacity to take, on average, approximately 79 calls per day (net of vacation, sick days, lunches, breaks, etc.).

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### **PROJECT GOAL**

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This managed care provider wanted to improve call service levels while decreasing administrative expenses. This in turn would increase customer satisfaction as well as productivity. The objective was to reach 60% of calls answered within 45 seconds while increasing potential rep productivity to an Average Calls per Rep per Day (ACRD) of 62 by the years end.

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### **PROJECT SAVINGS**

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At the start of the project the current percent of calls answered in 45 seconds was at the lower spec limit of 60%. Working with Juran, this company set out to fix the problem by holding focus groups that discussed real-time coordination. They came up with the following findings:



- 1) Reps felt that the system in place was not accurately managing their time and schedules:
  - There was one person left on the phones during lunch time as reps were often scheduled to take breaks at the same time.
  - The Call takers themselves were ignoring their schedules because they did not agree that they were best for the call center. There was no response or action taken by the management team.
  - Paid Time Off requests were not being granted based upon the forecasts, resulting in schedules that did not account for the vacation time of other reps.
  - Schedules were not being adjusted for more than the expected absences.
  
- 2) Reps also felt that the system was not accurately managing the call center queues. For example:
  - One queue had 30 calls waiting with 10 call takers on the phones, while another queue had 5 calls waiting and 25 call takers on the phones.
  - When the queues got “out of control”, no adjustments were made within or between queues.

The conclusions were straightforward: there were no actions taken for reps following their schedules, no management of queues, and minimal adjustments during the day. The team found that while available time existed, it was being wasted through poor real-time and queue management.

Juran implemented new goals based upon the drivers identified for Average Calls per Rep per Day and service level. They improved real-time coordination and the queue management process. Juran also improved the scheduling process and came up with a “Statement of Work” that employees had to follow in the event that they could not meet the guidelines.

Working with Juran, this large managed care provider was able to produce a statistically significant improvement in the percentage of calls answered in 45 seconds. The improvement could be quantified as a 9.5% increase which allowed for the potential of staff reductions. This large company was also able to see an improvement in employee adherence to their schedules.

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## **SUMMARY OF RESULTS**

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The managed care provider was able to successfully meet their goals of improving the percentage of calls answered in 45 seconds.



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## FOR MORE INFORMATION

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## CASE STUDY: IMPROVING DATABASE PROCESSES

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<b>Industry:</b>	Service Based Companies
<b>Company Type:</b>	A major credit card services company
<b>Project Title:</b>	Improve database process capabilities
<b>Tools Used:</b>	Six Sigma DMAIC
<b>Total Savings:</b>	Over \$1 million (Juran's client saved \$540,300. The client's client saved \$493,000)
<b>Project Timeline:</b>	Three months

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### PROBLEM STATEMENT

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A major credit card services company wanted to improve a particular client's database that held the credit card information of their clients. The company providing the cards was finding that a vast majority of people who had cards could not be located in the database when they called to ask questions. "No Match" was appearing in the search feature even though the people were indeed card holders. This was resulting in product and client dissatisfaction, as well as lost sales opportunities. On average, "No Match" was appearing for 65% of the people who called to find out about their cards.

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### PROJECT GOAL

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This credit card services provider wanted to significantly reduce the defects in the database so that only 3% of callers had a "no match" in the system. To achieve this, they planned to improve database process controls by establishing metrics and triggers to ensure stability.

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### BUSINESS CASE

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The services company was facing the loss of a critical client if the database problems could not be resolved. They knew they had to improve the system's inbound process capability as it was inadequately meeting their client's needs.

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## **PROJECT SAVINGS**

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Working with Juran, the database project turned out to be a major success. The credit card services provider saved a total of \$540,300.68. Its client saved a total of \$492,921.13, for a total of over \$1 million in savings. The company was able to reduce the defect rate to 3% after only three months. The credit card provider also gained 4 additional client campaigns as satisfaction and confidence was restored in their database.

The “No Match” project found that there were several root causes that lead to the misidentification of 65% of callers. Files were not being processed in a timely manner, meaning that new credit card holders were not being entered into the system on time. Much of the information that was being entered was found to be incorrectly coded. It also appeared that a number of names were purged erroneously due to problems with the set up of the database. People who were entering the information were found to have no real understanding of the process they were involved in. To counter this, all employees received on-site training in the system.

After uncovering all of the root causes, a well planned strategy was developed to maintain and control the process. Plans were documented to minimize risk and a back-up site was prepared for the database. All data-entry employees had to take part in customer-simulated mock calls, and instructions were clearly written on how to accurately code them.

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## **SUMMARY OF RESULTS**

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This credit card services provider was able to drastically reduce the “No Match” defects in their database, from 65% to 3%.

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## **FOR MORE INFORMATION**

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