

Case Study

**Health Alliance  
tackles  
expansion and  
health reform  
stresses with  
Upland Panviva.**



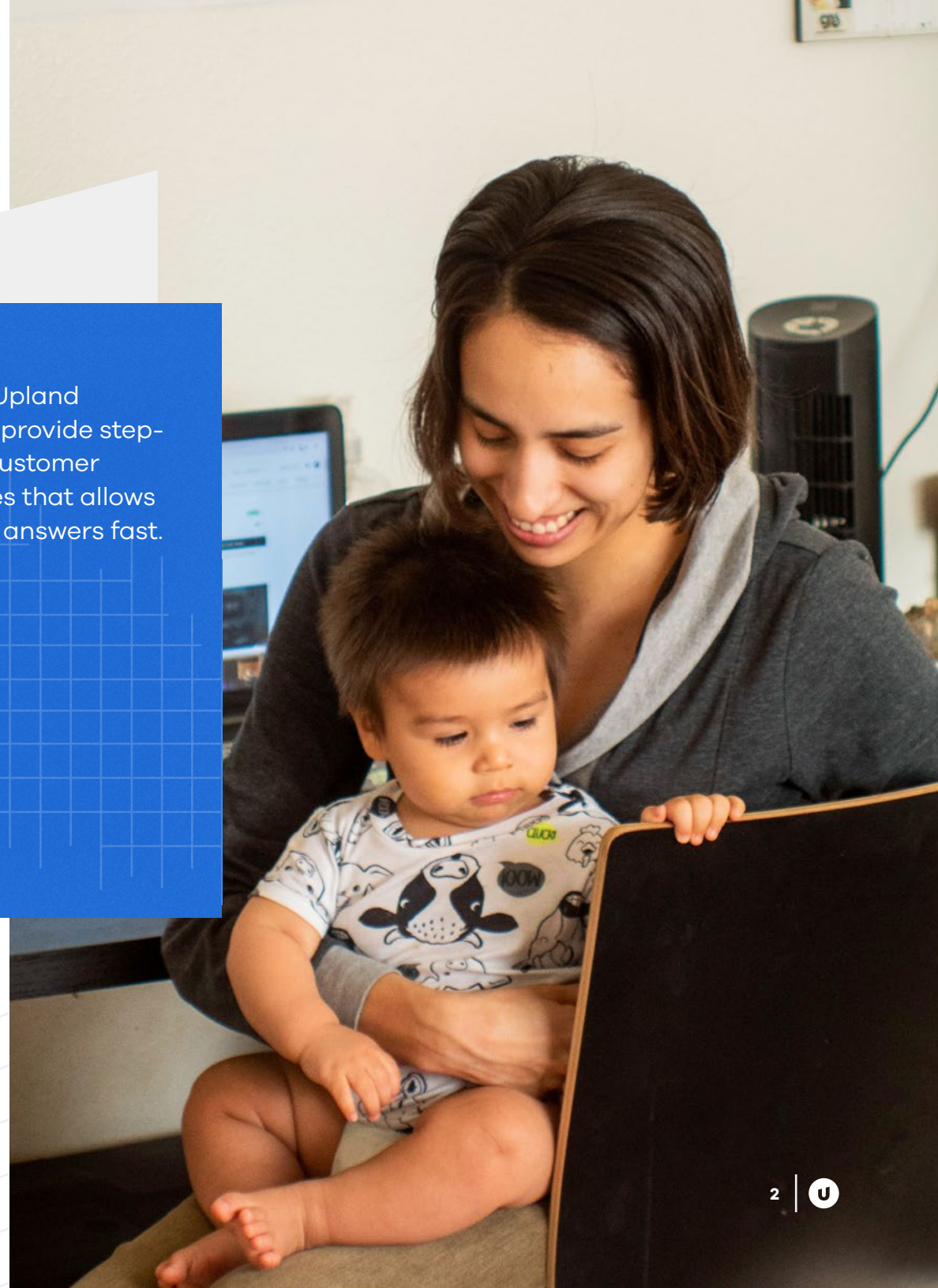
**INDUSTRY**  
**Healthcare**

**COMPANY**  
**Health Alliance Medical  
Plans**  
Champaign, Illinois  
[healthalliance.org](http://healthalliance.org)

Health Alliance Medical Plans is an Illinois-based insurer serving 270,000 members. The company has two contact centers with a total of 100 customer service representatives.



**Health Alliance** used Upland Software's Panviva to provide step-by-step guidance to customer service representatives that allows them to find accurate answers fast.





# How can you regain top-notch customer service metrics when your business gets complex?

**In late 2012, Health Alliance saw a coming storm.**

The upcoming expansion to new states, entrance into the highly-regulated Medicaid market, and the implementation of new plans compliant with the Affordable Care Act were causing an information deluge.

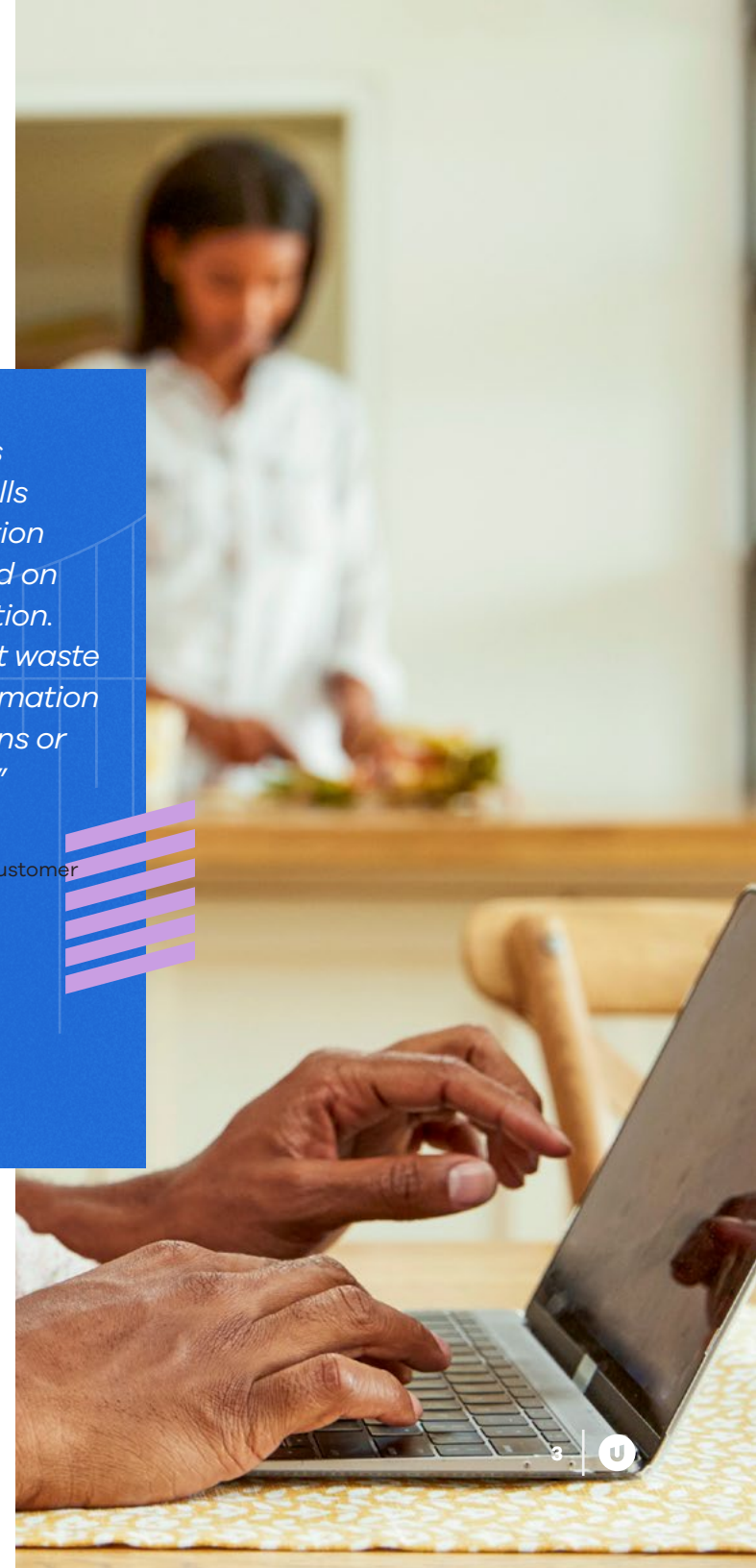
**Confident representatives; happy members.**

With Panviva, Health Alliance provides its knowledge workers with instant access to the exact information they need, as well as workflow navigation, applications, and communication. Everything lives in one place and can be accessed through a simple interface.

*"The business process guidance software tells agents what application they should use based on the customer interaction. Representatives don't waste time hunting for information in multiple applications or guessing at answers."*

**— Angela Beitelman**

Health Alliance's Director of Customer Service and Audit



# Health Alliance regained top-notch customer service metrics without hiring more staff.

## Beitelman had a decision to make.

Her plan had been to get Panviva up and running before her contact center faced the brunt of upcoming expansion and reform. But as she began implementation, the storm hit.

"If that performance were to have continued we would risk penalties for contract violations with some of our clients, we would risk loss of sales, and potentially risk not being awarded new contracts," Beitelman explains. She had to make a quick choice: continue with the Panviva implementation, or abandon it to deal with the immediate crisis. Beitelman chose the former.

She was soon impressed by the Panviva team's business consulting approach and

health insurance industry experience.

"The Panviva team helped me develop an ROI calculator based on previous implementations, as well as metrics specific to Health Alliance. This enabled me to project for senior staff how we would be able to impact the organization by implementing Panviva."

## Reps trust Panviva; members trust reps.

Initially, customer service reps were skeptical about learning another new application. But soon, reps began sending Beitelman emails telling her Panviva was the best product she'd ever purchased.

Could Health Alliance have regained its top-notch customer service metrics

without Panviva? "Maybe," she says. "But it would have taken longer, and it would have required hiring additional staff."

Instead, Beitelman's team felt more supported and turnover dropped. She saw representatives' mastery spike, and with it, customers' trust in Health Alliance.

"Panviva has increased the level of confidence that representatives have when they give an answer," Beitelman says. "The member feels, 'yes I got the answer, the representative knew what they were talking about, I don't feel the need to call back and see if I get a different answer.'" If they do call back, the Panviva roadmap ensures they will get the same answer."

## Results for Health Alliance

**decreased**  
Employee turnover

**surpassed**  
ROI projections

**reduced**  
Spend resulting from fewer new hires