Panviva
upland

Case Study

Rocky Mountain Health Plans retains call center talent with Upland Panviva

ROCKY MOUNTAIN
HEALTH PLANS®

Founded in Grand Junction, Colorado in 1974 as a locally owned, not-for-profit organization, Rocky Mountain Health Plans provides access to affordable, quality health care enabling its more than 229,000 members across the Western Slope to live longer, healthier lives.

Rocky Mountain Health Plans used Upland Software's Panviva to increase their call-center staff retention rate by 70%. Now, staff reach proficiency quickly and can more efficiently and accurately resolve complex customer needs.
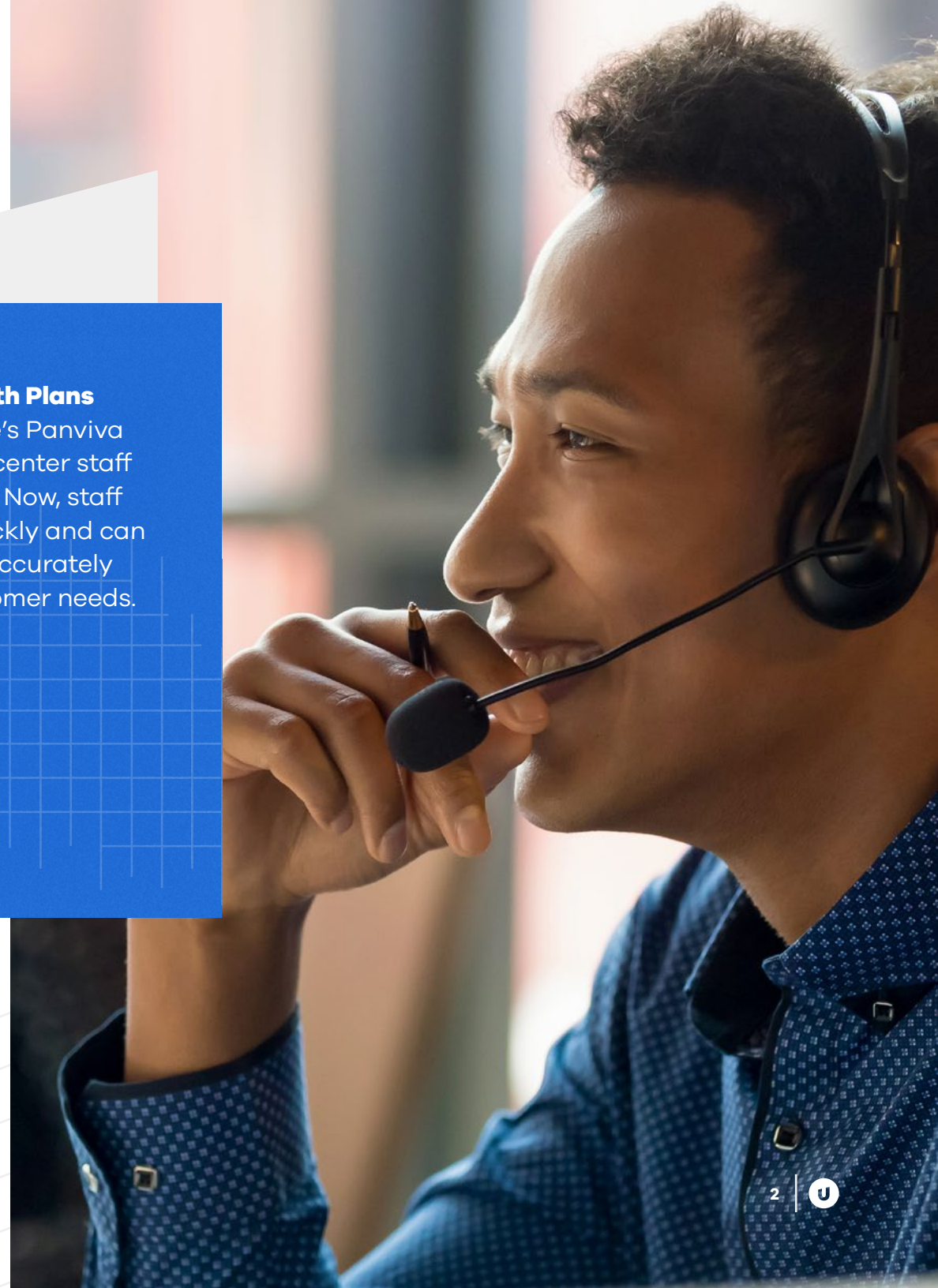
How do you better train and keep customer service reps?

Director of Customer Service Marci O'Gara found herself on the receiving end of a one-two punch.

Staff training and retention were down and call center errors, particularly misquotes on services, were rising.

"Training was a major pain point for us," O'Gara says. "We were growing and we were having trouble keeping people. We were having trouble adequately training them and onboarding them to proficiency in less than six months."

Panviva ushered in a new era for the call center.

As they built out Panviva, the team at Rocky Mountain Health took the opportunity to build better processes for call center reps to find and use information. In doing so, they were able to focus new-hire training on how to apply information and how to use Panviva to help solve complex problems.

"Our reps are very engaged. Panviva is so easy for them to use. The more that we get them involved with Panviva, the more they love it."

– Nicole Johnson
Customer Service Process Analyst

Staff retention has improved by 70% since implementing Panviva.

Through implementation, Rocky Mountain Health took another look at its existing processes.

Rocky Mountain Health began with the discovery and scoping process that is standard in a Panviva installation. The exercise helped the team rethink their entire business operation to find a better way.

"The biggest challenge for us was going from a documentation-rich environment to a process-driven environment. It forced us to think about things that we had not thought of before and [to create] a way of thinking about things that we had not had before," O'Gara explains.

With Panviva, new hires are up to speed on day one.

Rocky Mountain Health can now put new people in the call center in just two weeks, and reps on the floor are impressed. "It has helped train me in my job," says Maria Loffreda, Universal Representative III at the Pharmacy Helpdesk. "I use Panviva on just about every call. It has helped me through some very complicated processes."

Higher proficiency is also having an impact on retention. "We have [gone] from hiring a class of ten and keeping one to hiring a class of ten and keeping seven," says O'Gara.

One key improvement was eliminating reliance on memorization. Before Panviva, reps memorized answers and used sticky notes as memory cues in order to avoid using the old, difficult-to-navigate knowledge base, a practice that increased the risk of errors. Now, explains customer service rep Sally Montano, "the information is there. We don't have to look for it."

The result? "We have reduced our misquotes by 50%" says O'Gara "That is a substantial improvement in the member experience."

Results for Rocky Mountain Health Plans

70%
improvement
In retention rates

faster
Time to proficiency for new hires

50%
reduction
In misquotes

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