

Improving Call Flow for Health Plan Client Increased **Sales Conversions by 140%**



Industry - **Healthcare**

A comprehensive analysis identified the root causes of the sales performance challenges

The Challenge

When assessing the sales performance of support vendors, the largest Managed Medicare health plan wanted ResultsCX agents to significantly improve their sales rate. Key challenges were:

- A stronger focus on sales during the critical annual enrollment period was needed to increase sign-ups and meet enrollment targets.
- Existing client-provided training lacked a robust sales emphasis, hindering agents' ability to effectively close sales

The Initiative

A comprehensive analysis identified the root causes of the sales performance challenges and the following solutions:

- Created a detailed call flow guide to provide a structured framework for handling calls, ensuring consistent and effective sales interactions with potential members.
- Employed a pilot program to test call flow guide effectiveness among low-performers, allowing for optimization before full implementation.
- Used specialized training to improve agents' fact-finding skills, leading them through a needs analysis to better understand member requirements and offer tailored solutions.
- Implemented a comprehensive system for coaching management and tracking to ensure consistent utilization of the new call flow guide and provide targeted guidance to agents.
- Instituted 'Daily Agent Pulse Check' to reinforce successful behaviors and encourage continuous improvement among agents

The Outcome

The enhanced call flow program was rolled out to the entire support vendor team after successful pilot with the following results. The results of the pilot and full program were remarkable:

Pilot Outcomes:

- Pilot participants experienced significant improvements in performance metrics and sales effectiveness, with an average improvement of 10.2% in performance metrics and 21.3% increase in fact-finding effectiveness.

Full Team Outcomes:

The implementation of the enhanced call flow program across the entire team also had impressive results:

- 47% reduction in team defect rate for 2022 compared to 2021—the streamlined call flow and improved sales orientation significantly reduced errors and deficiencies, while enhancing overall operational efficiency.
- 140% increase in team sales conversions for 2022 compared to 2021—the new sales-centric approach and call flow guide substantially boosted sales conversions, enabling client to achieve enrollment goals and increase market share.