



### Goals

- Gain efficiencies in member searches/look-ups.
- Improve the agent-to-subscriber ratio.
- Rapidly add advocates (agents).
- Offer 24/7 service.
- Continually improve service levels.
- Promote the contact center and its advanced technology as a critical component of the offering.

### Challenges:

- Managing explosive and continuous growth.
- Automating customer search, history, and resources.
- Improving case-management capability to improve service.
- Responding consistently across multiple communication channels.
- The ability to operate 24x7.
- Fully protecting privacy and confidentiality (HIPAA compliant).
- Limited internal IT and capital resources.

### Cincom Solution:

Health Advocate selected Hosted Synchrony for its robust capabilities including:

- Automatic screen pops of customer data and history.
- A unified agent desktop with Smart Tabs to relevant content and resources.
- Case management – Capture and track interactions and outcomes across all channels and back-end systems.
- Remote agent support to provide for business continuity planning.
- Minimal investments and IT resource requirements.

### Results/Benefits:

- New efficiencies resulted in a 50% increase in productivity.
- Decreased new-case entry time by 21%.
- Significantly reduced customer searches from three to four minutes to (best case) six seconds.
- Accommodated 24x7 offering with remote agents.
- Reduced training requirements through unified agent desktop, facilitating the doubling of advocates.

Profile in Success: **Health Advocate**

# Cincom Synchrony™ Helps Health Advocate Deliver Highly Personalized Advocacy Service



## About Health Advocate

Health Advocate (HA), with headquarters in Plymouth Meeting, PA, is a national healthcare advocacy and assistance company whose mission is to help members deal with clinical, insurance and administrative issues across a broad range of medical, hospital, dental, pharmacy and other healthcare areas. The antithesis to the nation's inefficient and impersonal healthcare system, HA is known for its highly personalized, accessible service from knowledgeable experts. Founded in 2001, HA services are typically offered as an employee benefit to help employees and their families better navigate the complexities of the nation's healthcare and insurance systems.

Today HA covers more than six million Americans nationwide through its relationships with more than 1,600 employers, unions, third-party administrators and health plans. Clients include some of the nation's largest employers including Home Depot, CBS, Bertelsmann, Inc., Caesars Entertainment, Paychex and hundreds of others.

## Teams of Experts Build Trust by Resolving Medical, Clinical and Administrative Issues

The HA contact center is the hub of activity for researching and solving client issues. When a member calls, he or she is assigned to an advocate who works collaboratively with a team of healthcare professionals (including doctors, nurses and insurance-industry veterans) to work through the complex issues and often frustrating red tape. Whenever possible, members speak with the same advocate every time. All interactions are kept strictly confidential in compliance with the Health Insurance Portability and Accountability Act (HIPAA).

The goal of the HA contact center is to build relationships with its members by educating them or resolving their problems, rather than tracking and measuring interactions. The entire contact center – from the people to the technology – is built around delivering trusted advocacy for its members.



Kelly Johnston, Senior Vice President and Chief Operations Officer

*"We selected Synchrony for its ability to present all of the content and resources our agents need to access from a single desktop. We are able to maximize our time on the telephone with each client rather than going through time-intensive customer look-ups, interaction history, and content research. Plus, Synchrony's scalability has enabled us to keep up with our uncharted growth."*

– Kelly Johnston, Chief Operations Officer

**At the core of Health Advocate is a group of knowledgeable, passionate, skilled people who are experts on the clinical and insurance side of the healthcare system.**

## Synchrony Helps Manage Rapid Growth

Since its inception, Health Advocate has experienced monumental growth as evidenced by these statistics:

- In two years:
  - Tripled the number of member companies served: 1,600+
  - Quadrupled patient lives: 6M+
  - Tripled the number of advocates and project an additional 50% increase this year.
- In a three-month period:
  - Doubled call volume
- In one year:
  - Increased caseload by 59%
- Outgrew its space four times
  - 2001: 300 square feet
  - 2006: 26,000 square feet

And all signs point to continued growth for HA. Kelly Johnston, Chief Operations Officer, will tell you that growth is a good problem to have, but it is an ongoing challenge. In 2003, Kelly began a search for a more comprehensive contact center solution that would accommodate their growth and enable HA to fulfill its promise of highly personalized service to each client.

After extensive research, Kelly selected the hosted version of Cincom Synchrony. She knew she wanted to work with a company that would partner with her as a virtual extension of her business, and Cincom had a long history and reputation for service. The Synchrony offering had the robust capabilities that would enable HA to deliver personalized service as well as manage and grow the business.

## Hosted Solution Maximizes Flexibility While Minimizing Expenses

Selecting Synchrony hosted enabled Kelly to get the solution she required without expanding her IT resources or investing in a major capital expense at the outset. As the contact center has grown in size, she has been able to easily add new agents to the system. The remote agent capability of the hosted contact center enables advocates to log in from home or other locations to handle interactions 24/7. The hosted solution also gives Health Advocate peace of mind knowing that should its office in Pennsylvania become inoperable due to an outage or an emergency, the call center will still be up and running.

## Top 5 List - HA's Favorite Features

1. Smart Tabs and the dynamic resource panel make it easy to access all relevant systems and content such as benefit information stored in its proprietary content manager as well as external healthcare benefits databases.
2. Screen pops with immediate contact information and history.
3. Agent anywhere gives HA the ability to login from home or any remote location and fulfill its 24/7 service promise.
4. Case management – The ability to track, time and follow up on activities is critical to HA's business.
5. Training advantages – It's easier to train new hires on Synchrony because of its intuitive interface and unified desktop that eliminates the need to train on backend systems.

*"It's like calling 9-1-1. We're not an emergency service, but when someone has an issue with the healthcare system, to that individual, our service is critical. Health Advocate has made the requisite investments in people and systems to uniquely support our clients' needs."*

– Marty Rosen, Chief Marketing Officer

**Health Advocate is a powerful nerve center that simplifies access to the nation's complex healthcare system.**

## Speed and Productivity Increase Efficiency and Service: an Agent's Perspective

Ed Hampson, a registered nurse and the second employee hired at Health Advocate, currently works in the contact center as a Senior Personal Health Advocate and appreciates the streamlined functionality of Synchrony. "With Synchrony acting as a unified desktop, I can quickly access the right benefit plans, the web resources and the client history so that I can help the client faster," states Mr. Hampson. "If I transfer a call, the new Personal Health Advocate gets the same screen pop so that we can have a continuous and uninterrupted conversation with that client. Overall, Synchrony saves a great deal of time by automatically searching for and presenting relevant information, eliminating the need to flip back and forth from multiple systems and screens. It's efficient and easy to use."

## Case Management Capabilities Help Move Business Forward: a Manager's Perspective

"Our members' issues are complex in nature, therefore first-call resolution and other traditional call center metrics aren't that important to us," explains Sue Clark, Manager of Customer Satisfaction and Quality. Sue has worked in a number of contact center environments and finds Synchrony's case management capabilities to be particularly critical in HA's knowledge-intensive center. "It is not unusual for a Personal Health Advocate to work on a case for two to three hours. We don't expect cases to be resolved quickly. They are complex in nature and require research and follow-up. The ability to track all activity and time associated with each case helps us provide better service as well as understand and manage our business. Synchrony automatically presents all case activity on the unified desktop so our Advocates have a complete view of the client and are more productive."

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World Headquarters • Cincinnati, OH USA • US 1-800-2CINCOM  
Fax 1-513-612-2000 • International 1-513-612-2769  
E-mail [info@cincom.com](mailto:info@cincom.com) • <http://www.cincom.com>



## The Results: Efficiency, Productivity, Expanded Service

Since implementing Synchrony, HA's contact center has become more efficient and productive.

- The ratio of advocates to subscribers has decreased by 50%.
- New-case entry time has decreased by 21%.
- Customer searches have been drastically reduced from three to four minutes to (best case) six seconds.
- The number of Personal Health Advocates has doubled.
- Call peaks during employee benefit enrollments and other unplanned events that impact large numbers of members (such as a major hurricane) are now effectively managed.
- HA now accommodates a 24x7 offering with remote agents.
- Through the unified agent desktop, training requirements have been reduced.

## Growing with Synchrony

HA is not done growing, and Synchrony will be there to support them. HA expects to continue to add more advocates (50% more agents projected for the upcoming year) to respond to its ongoing increases in call volumes. At the same time, its goal is to continuously increase efficiencies and reduce unnecessary expenses, as the increased number of agents will be met by an even larger increase in call volume. HA also plans to add secure e-mails and faxes as additional channels of communication for its members. This will enable the agents to uniformly handle all member communication from a single desktop environment with complete member history and case management regardless of the channel. Synchrony also has a number of important capabilities that Health Advocate plans to implement or expand in the future including a more in-depth use of content management, workflow, knowledgebase and automated callbacks – all of which will help to further boost productivity and reduce response times.

While it doesn't appear that the US healthcare industry is going to get any simpler in the near future, members of Health Advocate have fewer worries. With the assistance of Cincom Synchrony, its advocates will be even more efficient at navigating the complexities of the healthcare system, ensuring that members receive the best care possible.