

# Case – Contact Center Assessment & Implementation Clinical Care Provider for Underserved & Multi-Ethnic Populations

## Overview of the Challenge

A federally qualified, regional clinical care provider (client) contacted Triadic Group (Triadic) for assistance as they undertake a transformation to a more comprehensive and sophisticated managed care healthcare model. The client has aspirations for achieving operational excellence through continuously improving patient services, patient access, and first call resolution.

Triadic performed an assessment of their centralized contact center located in the clinic network. Triadic also spent time in the clinics; interviewing employees, nurses, and providers. The results presented a contact center very much an island in a healthcare environment; with limited contact center subject matter expert-level resources managing the operations; serious systems support limitations; and supervisor and agent teams that were under trained; requiring basic skills for the technology in-house.

Triadic assessed the contact center from two perspectives, technology and operations; recommending the essential short-term changes to drive operational evolution, in preparation for longer-term organizational transformation (see below).

## Recommendations

### Technology

1. **Platform** – leverage capabilities, conduct discovery for enabling more capabilities (e.g., outbound dialer).
2. **IVR** – implement governance and rules for day-to-day management; institute regular business reviews; review of CSAT patient data and feedback for changes.
3. **Training** – limited to no systems training, all current and future personnel need to go through certification requirements for all existing systems; cross training.
4. **Resources** – limited resources, if main person gets hit by bus, organization in big trouble; add resources; get everyone cross-trained and certified.

### Operations

1. **Change Management** – organization needs to develop disciplined structure for change; governance, patient experience, journey mapping.
2. **Service Delivery Model** – changing to a patient-centric model essential, and the right move; communication; coordination, cooperation critical to success of transformation.
3. **Resources** – no subject matter experts with contact center experience; hire a director, hire statistical analyst; review corporate trainer arrangement, dedicated.
4. **Recruitment** – develop agent pipeline, develop part-time agent pool; develop supervisor and agent profile.
5. **Training** – determine how to get dedicated training resources; develop nesting unit to transition new hires into prior to hitting operational floor; re-train soft skills; standardization of the training process with far greater oversight.
6. **Floor management** – get supervisors out of the offices and onto the floors; need for re-training on motivation, coaching, disciplinary skills
7. **Workforce Management** – provide training to all ops management; develop regular schedule development and meeting protocols for weekly reviews.

### Client – Fast Facts

- Federally qualified health provider
- Clinical care for more than 200,000 lives
- Centralized, 100-agent contact center, predominantly voice

### Business Need

- Provide greater patient access
- Increased First Call Resolution
- Greater demand for services from business partners
- Transformation process and plan design

### Plan & Process

- Complete analysis of the technology infrastructure
- Determine if technology can support both current and future requirements
- Assessment of contact center operations, management, and support personnel
- Review contact center strategy, service delivery model, process & procedures, training, quality assurance, WFO, recruitment and hiring
- Conduct on-site interviews with management, stakeholders, understand vision and strategy for transformational undertaking
- Review design for new contact center; provide POV
- Review current WFM operations and process; provide POV

# Case – Contact Center Assessment & Implementation Clinical Care Provider for Underserved & Multi-Ethnic Populations



## Applying Expertise, Perspective, Leverage and Process

Triadic employs a proven consultative methodology that is based on the operating principles of clarifying vision and strategy, improving efficiency, leveraging industry best practices; all in an effort to improve patient experience and satisfaction, reducing cost, and increasing revenues.

Triadic interviewed executives, operations management, front-line agents, front desk personnel, providers, and medical assistants, support departments (HR, IT), and vendors to get a complete understanding of the current environment. Triadic assessed how each group interacts with the patient and the issues that exist today with delivering consistent, high quality service. Triadic mapped how it should be in the future; and what the impact would be on strategy, people, processes and technology to achieve full transformation.

Triadic focused on identifying, defining, quantifying and validating the needs and wants of client's patients and providers for they were the two groups most impacted by the services being delivered today. The assessment data was the driving force for determining what the new vision and direction for the contact center would be, and it served as a foundation and framework for a detailed multi-year transformational strategy.

## Driving Results

What emerged was a comprehensive **vision** and **strategy** that would transform the healthcare contact center organization. For the first time the client could see the end-game, a **methodology** to achieve its goal and the outcome that would drive consistent quality patient experience.

To ground the vision and strategy in the current environment, Triadic first conducted an **assessment**, delivered **recommendations** and articulated the benefits of the newly conceived contact center transformation strategy.

Triadic drives results for its clients through leadership, a best-practice-based approach and project administration. It is Triadic's ability to foster commitment and facilitate feedback and communication that enables its clients to see real-time results, change and execution in the delivery of services promised.

Triadic Group shares with its clients its knowledge and leading practices and its experience-based understanding of what is a good customer-centric model.

The consultants' expertise also helped the client with its technological decision-making requirements, giving the client team the tools for accurate evaluation and assessment of complex alternative solutions.

### About

#### Triadic Group, LLC

Contact Center Consulting  
Strategy, Engagement &  
Performance

*Triadic Group is an independent professional services collaborative that provides vision, values, planning and implementation support for organizations that want to improve their contact centers' strategy, engagement, process, performance, tools and technology.*

Triadic Group was founded in 2006.

#### For more information:

email us at  
[info@triadicgroup.com](mailto:info@triadicgroup.com)

or call

**781.784.8089**