GLOBAL
tech

Customer Success Story

Phoenix Solutions Implements a System to Reduce Global Tech's Contact Center Escalations **53.4%**

At a Glance

53.4%

Reduction in Contact Center escalations

- -

93.8%

Reduction in client escalation log volume

- -

24%

Reduction in outstanding calculation volume

- -

74%

Reduction in overtime hours and compensation

Background

Global Tech is an industry-leading Fortune 100 technology company serving millions of businesses and consumers worldwide.

Their products include:

🌐 **Internet services**

📶 **Wireless technology components for home and office**

▶️ **Digital media services**

📱 **Mobile and landline phones**

In 2021, their gross revenue reached **$120.61 billion** dollars.

They have **4,500** employees across five continents.

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The Challenge

Global Tech contracted with Phoenix Solutions to administer their retirement plans. As a global service provider with a long history in a rapidly evolving industry, they'd made many changes to their Plans to remain competitive in the marketplace.

The Plans were complex due to:

- **Acquisitions**

- **Grandfathered & frozen benefits**

- **Union contracts**

- **Recent changes to the retirement benefit calculations for some plans**

Phone calls were overwhelming the contact center's staff with questions they couldn't answer and demands they couldn't meet. Their inboxes were filled with several hundred open cases, some as old as six months.

Many frustrated Global Tech employees escalated their open cases within the contact center. A smaller yet substantial subset escalated their cases to Global Tech's Human Resources Benefits Administration Team for further review and action.

Global Tech's escalation tracking log had swelled to well over 100 cases they wanted their plan administrator to resolve.

The Journey

Phoenix Solutions appointed an Escalation Client Services Manager (CSM) to manage the case resolution project.

To confirm our understanding of the problem's scope and depth, our discovery process involved three phases:

Phase I
Preliminary review of open case reports

The CSM obtained data from the two primary sources:

Internal reports
The preliminary review identified inconsistencies, inaccuracies, and aged cases. Some cases' notes offered little or no hint of the call's escalated nature.

Some cases had callbacks scheduled so far in the future it all but guaranteed an escalation to the client.

Client escalation log
The client escalation log was far more detailed: the two internal benefit administrative teams met weekly with the client to review them. Dozens of cases had aged due to their complexity or legal considerations.

Phase II
Discovery meetings

Phoenix Solutions conducted separate meetings with each stakeholder group to encourage transparency and obtain a baseline from which to assess the situation:

- Internal benefits administration teams
- Contact center management team
- Global Tech benefits administration team

Internal benefits administration teams
There were two administrative teams consisting of six members each, with their seniority varying from six months to twenty-five years.

They perform three types of calculations:

- Manual calculations where the automated system can calculate the "base benefit" as a foundation for a manual calculation.
- Manual grandfathered and frozen benefit calculations
- Peer and system quality assurance reviews (per contractual obligation)

Team members felt overwhelmed and at risk of burnout. Many worked weekends just to keep "treading water" because they'd "lost hope" for eliminating the backlog.

They also described simmering tension with the client benefits administration team due to ever-increasing workloads and unrealistic deadlines.

Contact center support teams
The contact center support teams felt pressured from both sides to know the plans better, handle the calls, and reduce the escalations.

High call volumes made it difficult to schedule follow-up training without risking financial penalties for missed Service Level Agreement (SLA) metrics and milestones.

Team managers, Technical Analysts, and quality coaches were taking calls to help absorb the higher call volumes. This delayed the coaching opportunities that could help improve service delivery.

Client benefits administration team
The client felt the situation was deteriorating with no clear and convincing plan to remedy it, and their contract was up for renewal in the coming months.

Phase III
Case severity & risk assessments

Overwhelming case volumes left the benefits administration and contact center teams without a firm grasp of their backlog's severity and potential legal/financial risks.

Phoenix Solutions worked with the contact center's Technical Analysts to "triage" the backlog for severity and risk assessment purposes.

Case deemed high severity/high risk received immediate review from benefits administration team leadership.

The Solution

The challenge's complexity mandated:

- **Improved communication**
- **Coordinated and cooperative efforts**
- **An agile, scalable, and sustainable solution**
- **More effective partnership between all stakeholder groups**

Phoenix Solutions' tactical approach called for implementing multiple tools and initiatives:

Case reporting classifications

IT added subcategories to the case management system's database to improve reporting granularity. Instead of just "Escalated," the subcategories added a reason, such as whether a calc was overdue, disputed, never received, etc.

SQL script to retrieve troubling case notes

The CSM worked with the IT department to develop an SQL script that ran nightly, crawling case notes for inflammatory language. "Hits" were captured in an email with some context for follow up.

The internal benefits admin team leaders and CSM received the auto-generated email for review and follow-up. The CSM owned the preliminary research, looping in the leaders only as needed to permit them to focus on higher priorities.

Research included reviewing case histories and listening to call recordings.

Contact center training

With the contact center management team's buy-in, the CSM partnered with Quality Coaches to coach the Customer Service Representatives (CSRs) regarding:

- **Controlling a call**
- **De-escalating a call**
- **Explaining one of the newer, most confusing benefit plans**

Controlling a call

De-escalating a call

Explaining one of the newer, most confusing benefit plans

Facilitate partnership - internal benefits admin teams & contact center Technical Analysts

Technical Analysts (TA) are the contact center's first line of defense when a customer asks to speak with a supervisor.

The CSM introduced them to the internal benefits admin team members and included them in meetings. They developed a rapport that expedited knowledge transfer, equipping the TA's to resolve more issues at the point of first contact.

Help text expansion

The CSM added content to the case management system's Help text to better equip the contact center to provide customer support.

Feedback

"We know how you did it, and we're still amazed! Thank you for your dedication!"

Senior VP of Benefits in Global Tech's Human Resource Department

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"I had confidence in the plan, but I never expected to see results as quickly as we have. Thank you!!"

VP of Benefits in Global Tech's Human Resource Department

The Implementation

The CSM started reviewing the daily SQL escalation log on day one.

A project team consisting of high-performing customer service representatives, Technical Analysts, and the Escalation Client Services Manager reviewed the cases to recategorize and assign priority & risk levels.

The Quality Coaches facilitated "lunch and learn" training sessions, buying the team lunch in exchange for 30 minutes of their lunch hour for further training.

The CSM embedded with the contact center teams to most closely monitor developing escalations and lend realtime support to Technical Analysts, Quality Coaches, and Team Managers.

Summary

Global Tech tasked us with the:
- **Rapid diagnosis of a complex and chronic problem**
- **Implementation of a strategic plan to prevent the devastating loss of their flagship client**
- **Tactical oversight of a cross-functional team effort**

We reached these milestones along the way:
- **Completed the discovery process in 2 weeks**
- **Secured client and vendor buy-in in 3 weeks**
- **Developed a strategy for a scalable and sustainable solution in 5 weeks**
- **Implemented the strategy in 6 weeks**
- **Substantial improvements in metrics/KPIs within the quarter**

Global Tech entered the New Year with stronger benefits administration and contact center teams, reduced workloads, and time and cost savings due to reduced overtime compensation.

The Results

The coordinated team effort reduced the internal client calculations backlog volume more than **53.4%** and the client escalation log volume **93.8%**.

Our Service Level Agreement metric improvements:

53.4%	93.8%	24%	74%
Reduction in Contact Center escalations	Reduction in client escalation log volume	Reduction in outstanding calculation volume	Reduction in overtime hours and compensation

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