

Increasing Customer Satisfaction at an Internal Call Center

Allmerica Financial Corporation

Background: The Allmerica Financial Corporation is a holding company for a diversified group of insurance companies comprised of stable, experienced, regional businesses committed to the Property & Casualty insurance markets. Trusted names in insurance since 1852, Allmerica Financial companies offer a full selection of insurance for automobiles, homes, boats, and businesses, providing personalized service through over 2,000 Independent Agents. Allmerica Financial and its companies continue to earn some of the highest ratings in the industry (U.S. only).



Allmerica is one of the nation's oldest insurance carriers. With more than 4,500 employees, Allmerica is well positioned, strategically and geographically, to meet the demands of individuals, businesses, and Independent Insurance Agents. Allmerica's products incorporate the strength and capabilities of a national insurer and the local focus and knowledge of a regional carrier.

Allmerica relies on its Technology Service Center (TSC) to provide technical support to its employees and agents. While the TCS experienced success with their increase in call management statistics (less than a 3% abandon rate of callers leaving the queue and a 73 - 75% first time call resolution rate), there were less than satisfactory results when ensuring that the caller was delighted with the service. While TSC members were able to quickly and expertly resolve the caller's technical issue, there existed an opportunity to take customer service to the next level.

Challenge: While the TSC team does not deal directly with Allmerica customers, their ability to provide high quality customer service has a direct impact on the overall success of the company. If the TSC doesn't complete their job in a timely, accurate, and clear manner, the employees that they deal with will not be able to successfully complete their jobs and effectively service Allmerica's customers.



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Speaking with another person over the phone creates a unique set of challenges for the TSC employee and the Allmerica employees that serve as their customers. Since neither the TSC team member nor the Allmerica employee calling into the TSC can see each other, they are unable to read each other's body language or facial expressions. This means that the impressions the customer receives from the TSC team member are being conveyed through the team members' choice of words, tone of voice, ability to listen, well-asked questions, and professional verbal etiquette. In such an auditory communication environment, it was important that TSC team members possess the requisite customer service skills to create the kind of positive "customer focused" experience that resulted in satisfied and delighted customers.

Additionally, the TSC had specific scheduling issues that could not be easily addressed by Allmerica's Corporate Learning Services.

Solution: Entelechy was asked to work with Corporate Learning Services to provide a blend of existing online training with customized modules from Entelechy's *High Performance Customer Service* program – and to deliver the training in a way that would minimize the amount of time that TSC members were away from the operational demands of their business.

Making callers feel like they're being treated with care, dignity, and respect while quickly resolving the technical issue was becoming increasingly important for three reasons:

- First, customer service skills were increasingly being tied to the TSC members' performance goals. Excellent customer service skills were required of each member.
- Second, departments within Allmerica were beginning to recognize the options they had for obtaining technical support. TSC was literally competing for this business and to win the business required superior customer service skills.
- Third, in the near future TSC would be implementing online feedback mechanism to track client satisfaction. Superior customer service would also be tracked.



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Working with the Corporate Learning Services team as well as with TSC management, Entelechy created Allmerica's *High Performance Customer Service* training, a customized program that included:

- Module 1: Focusing on the Caller (develop a caller-focused approach while interacting with callers)
- Module 2: Communication and Call Flow (introduce the Call Flow as a tool to guide interactions)
- Module 3: Exploring Social Styles & Motivators (examine personal values and goals, motivators, and social styles, as tools to improve job satisfaction and effectiveness with customers)

Customer-Focused Mindset	S k i l l s	C a l l e r F l o w	1. Preparation
Presence			2. Greeting
Relating			3. Identify the need
Questioning			4. Address the need
Listening			5. Close the call
Checkback			6. Follow through

Due to the nature of the TSC representative's job, Entelechy delivered the customized training over the period of three months (one delivery a month). This flexible scheduling met Allmerica's delivery requirements and ensured that all TSC members received the same training.

Results: The manager of the TSC reported significant improvements in the customer responses on follow-up surveys. Customer satisfaction, professionalism, and integrity all showed gains as a result of the training.

In addition, the TSC manager – working with Entelechy – created several performance management tools to help reinforce key skills. Most importantly, Entelechy embedded the skills covered in the training into TSC's performance management system, ensuring that the skills learned in the training were reinforced, measured, and developed.