

Evaluation of Health Line Efficiencies

Recommendations for

Optimal Utilization of Efficiency Template

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Evaluation of Health Line Efficiencies Recommendations for Optimal Utilization of Efficiency Template

The efficiency template (Appendix A) was developed for the purposes of evaluating health line efficiencies. The template is representative of the key elements of health line efficiency and is based on a comprehensive review of literature and best practices. This evaluation is intended to provide a benchmark of your organization's efforts on achievement of vision, mission, values and business planning processes.

The template acts as a self-assessment tool, which is designed to guide individuals to evaluate their program's quality, performance, service delivery and organizational climate. It provides a methodology to inspire leaders to motivate and involve their people, examine their business processes and challenge technology to result in program excellence and best practice.

The tool also provides a tactical approach to document areas of strength and areas needing improvement; including a means to establish organization priorities and performance follow up. The assessment tool used for evaluation of efficiencies purposes, was presented and formatted with key elements and bulleted areas to scrutinize or address with specific measurable results

The efficiency template provides the capability to create project plan details and makes discussions visible. The template provides neutrality and minimizes biases that can compromise discussions. Although this tool has been created specific to the purpose of evaluating health line efficiencies, the concepts introduced have been used before.

The features of this template facilitate:

- Organization-wide alignment and focus
- Visibility and promote clarity of communication
- Systematic review

The purpose of the evaluation is to ensure standards of quality for the program are achieved and maintained and to assist in the improvement of the program. It is a means to establish confidence in maintaining an efficient and competent service delivery model. The efficiency template provides a transparency of accountability for the community it serves and its stakeholders.

The following steps are recommended regarding the efficiency template to ensure the optimal use of the tool.

Step 1

Initiate an external review to establish baseline efficiencies and best practices relative to the program experience benchmark

Step 2

Ensure complete understanding of rating system in the value and description of the value. This scoring system is based on four dimensions - approach, deployment, results and review:

- **Approach**
The completeness and appropriateness of the methods, tools, processes, systems, policies, guidelines and techniques that the program uses to achieve the elements identified in the efficiency model template
- **Deployment**
The extent to which the approaches are applied to all relevant areas in the efficiency model template
- **Results**
The outcomes and effects in achieving the purposes and objectives in the efficiency model template

- **Review**

Continual improvement initiatives are underway and focused on performance excellence. Initiatives that include:

- Processes used by the nurses and experienced by the caller
- Improving a specific key call centre performance area
- Improving an existing process that is not performing well or that is part of a solution to an operational problem.
- Acquiring a new process that provides additional call centre capability to meet a new need or solve an operational problem.

Step 3

To determine if the program’s objective should be to continue to excel and supercede existing satisfactory performance areas, or whether the objective is to ensure that performance meets expected requirements in all areas. Define a model or process that supports the organization’s planning system and identifies a means to focus the organizations efforts on breakthroughs or developments required to achieve the strategic vision of the organization, caller satisfaction and positive business results

The decision grid elements include discussion on:

- Will this lead to improvement
- Is it aligned and does it address vision/purpose
- Is it caller driven
- Does it have the potential to be made visible
- Will it add apparent value
- Does it support and/or generate measures
- Does it enable a greater efficiency
- Can it be integrated

A grid system is suggested to identify elements to focus efforts and resources according to overall program objectives:

Example:

Category	Efficiency Element	Relevancy to Program Purpose	Level of Complexity to Initiate	Resource Utilization	Relevance To Key Performance Indicators	Degree of Applicability to Program
People	#16 Support for skills building	High	Low	Mod	High	High
People	#21 Coaching and call monitoring program	High	High	High	High	High
Process	#14 Problem or case tracking management system used	Mod	Low	Low	Mod	Mod
Program Leadership	#1 Multi-site strategy defined	Low	High	High	Low	Low

Step 4

Develop project plans defining requirements (example: personnel, resources, external expertise) with identification of project team members. Project plan must include measurable outcomes

Step 5

Action the project plan with time lines and accountabilities specified

Step 6

Ongoing review and evaluation using efficiency template with comparisons to baseline benchmarking

Step 7

Conduct an annual review with independent experts. The focus on excellence requires a close examination of key elements and core values, concepts and business planning. To promote quality awareness and practices, organizations should conduct annual benchmarks for measurement of improvement

Our approach as independent reviewers:

The efficiency evaluation is a comprehensive analysis of your operations. At your site, activities include the collection of data, conducting interviews, analyzing findings, constructing a model of your operations, and using this model to make recommendations for improvements. The presentation of material includes an observations section to substantiate and support findings with opportunities information that can be used to problem solve.

CONTACT CENTRE BEST PRACTICES¹

Based on research and excerpts taken from 2004 Best Practices in Call Center management report where 240 call centers contributed best practices and lessons learned.

What's Hot and What's Not

Call center improvement initiatives

1. **Technology enhancements** including IVR (integrated voice response), ACD (automatic call distributors), New desktop systems and software, CTI (computer telephony integration), VoIP (Voice over Internet Protocol)
2. **Growth in call center capacity** by adding more employees (CSRs), adding new or expanding existing sites, and lengthening hours of operation.
3. An improvement in the effectiveness and knowledge of call center staff achieved through **longer training sessions, new training programs, cross-training** and more intensive hiring practices.
4. An increase in **Web interactions**, with more customers using the Web for self-service and frequently asked questions (FAQs), as well as the use of email and email auto responders.
5. **New management** as a result of attrition, reorganization and mergers.
6. Implementation or improvement of **call monitoring processes**, leading to improved coaching, increased productivity and improved quality.

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Overall Ranking Of Improvement Initiatives

The table below summarizes the most frequently cited changes over the last two studies. The numbers in each column are the impact rankings for each change. For example, a ranking of "1" in the call center efficiency column for improved technology means that this change was listed more frequently by participants than any other change as having the greatest impact on call center efficiency.

**A shaded box indicates a change in ranking importance between the 2001 and 2004 studies.

	Greatest positive impact on customer service		Greatest positive impact on call center efficiency	
	2004	2001	2004	2001
Improved technology (both hardware and software)	1	1	1	1
Improved training programs	2	2	2	2
Enhanced quality monitoring programs	3	5	5	4
CRM implementation		3		
Web-enabled call center and Internet self-service	5	4	4	
Workforce scheduling and staffing improvements	4			5
Management and process changes			3	
Incentive and recognition programs				3

Changes With The Greatest Positive Impact On Customers

Changes that had the greatest positive impact on customer service were:

1. Improved **technology or system upgrades** in both hardware and software.
2. Improved **training programs** in product and service areas as well as cross-training and ongoing learning leading to better informed agents. Some respondents also stated that they had improved their hiring practices, resulting in an improvement in agent quality. *"One-call-does-it-all approach."*
3. More active coaching and **call monitoring** with better metrics, improved performance measurement and enhanced feedback processes.

4. **Addition of agents** to meet staffing requirements thereby helping to balance the workload.
5. Increase in **Web interactions** allowing Web ordering and status checking, email, quick access to FAQ information and self-service.

Other changes that positively impacted customer service were:

- Enhanced customer service focus with the implementation and improvement of CRM programs and solicitation of customer feedback.
- Management changes resulting from mergers, reorganization or consolidation

Changes Having The Greatest Positive Impact On Cost Savings

As in the 2001 study, new technology and technology upgrades were once again listed as the number one contributor to cost savings and call center efficiency. Overall, the top five changes with the greatest impact on cost savings were:

1. **Technology improvements** or system upgrades such as ACD, IVR, enhanced call routing, CTI and software enhancements.
2. **Training and cross-training** for skill improvements as well as improvements in the hiring and recruiting process to obtain more quality employees.
3. **New management** and processes due to mergers and reorganization or consolidation.
4. **Web interaction** with self-service, access to FAQ information and online ordering.
5. Enhanced performance and productivity **monitoring**, with more coaching and call monitoring, improved metrics and a focus on reduced handle time.
6. **Centralization** and consolidation of processes and departments.

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Business Drivers Motivating Change

Participants listed a number of business drivers that are accelerating short-term changes in their call centers. The drivers, in rank order, were:

1. The need to maintain or increase the level of customer service including speed of answer and quality of the customer's experience (first-call resolution rate).
2. The need to improve efficiency and productivity to reduce costs, deal with budget constraints and comply with staff reductions or freezes on hiring
3. Business growth from increased products and services offered, cross selling and an overall increase in call volume
4. Market trends and conditions forcing a need to stay ahead of the competition
5. A changing company strategy driven by management and cultural change.
"People affect every aspect of our business and hence all new policies are being made [to maintain] the overall satisfaction and growth prospects of employees."

Efficiency Model Template

Developed by:

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Rating System	
Value	Description
0	Does not meet the expected requirements
1	Performs substantially below expected requirements
2	Performs below expected requirements
3	Performance meets expected requirements
4	Performs above expected requirements
5	Performs substantially above the expected requirements

Elements of Efficiency – People	0	1	2	3	4	5
1. Organizational design and span of control						
2. Core competencies identified and documented for all positions						
3. Job descriptions current and documented						
4. Recruitment advertising language written						
5. Selection instruments that acknowledge knowledge, skills and abilities (typing test, knowledge tests, etc.)						
6. Behaviour style interview questions						
7. Selection matrix with weightings						
8. New hire orientation						
9. Manpower planning and forecasting (staff scheduling and rostering)						
10. Career path and succession planning program						
11. Exit interviews						
12. Employee recruitment and retention program						
13. Employee reward and recognition program						
14. Established communication process (staff meetings, feedback)						
15. Stress management/ergonomics training						
16. Support for skills building						
17. Continuing education (funded opportunities, education leave, etc)						
18. Employee satisfaction and morale surveys						
19. Compensation plan consistent with organizational philosophy						
20. Training and orientation program						
21. Coaching and call monitoring program						
22. Formal performance planning and review process						
23. HR policies current, documented and available						
24. Measurements or key performance indicators specific to HR practices are defined						
25. Staff problem and grievance resolution process is established						
26. Contingency plan for job action						
27. Organization chart reflects that Registered Nurses (with appropriate education and experience) plan, direct and evaluate nursing services						

<p>28. Registered Nurse competency assessment in relation to:</p> <ul style="list-style-type: none"> • Clinical knowledge • Application of the nursing process in telehealth care • Delivery of culturally sensitive care to identified populations • Assessment and provision of care using telecommunication device • Use of clinical decision support tools • Demonstration of problem solving, collaboration and customer relations skills • Communication skills • Knowledge and appropriate use of approved resource (people, service and materials) • Prevention and reporting of unusual occurrences and adverse events • Accurate and expedient documentation 						
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Elements of Efficiency – Process	0	1	2	3	4	5
1. Documented work flow and work processes including administration processes; detailing function and position authority						
2. Documented customer contact and service channel processes						
3. Ease of access to relevant data and information for the service representative						
4. Understanding and documentation of end-to-end business processes						
5. Service level agreements with internal business partners						
6. Electronic data recording systems including on line applications and tools						
7. Minimum requirements to memorize information						
8. Screens are sequenced to follow the call						
9. Established workforce management processes for staff scheduling including call outs						
10. Productivity and performance reports available						
11. Contact centre policies for variances in business processes						
12. Continuous process improvement team or organizational focus on tasks						
13. Internal and external communication processes defined for management of customer enquiries, media enquiries, stakeholder enquiries						
14. Problem or case tracking management system used						
15. Case or file audits to measure accuracy of responses						
16. Participation in, or opportunity to provide input and feedback on new product or service or program applications testing						
17. Corrective action established to restore performance process (technical and human)						
18. Variance reporting and process for follow up of unanticipated events						

19. Consent process established						
20. Business and support service trends are documented				X		

Elements of Efficiency – Technology	0	1	2	3	4	5
1. Hardware and software systems are reliable, secure and user friendly						
2. Software and hardware current with changing health care service needs and directions						
3. Are multiple service channels (example: phone/email/web site/fax/walk-in) available						
4. Measurement and prediction of customer service traffic						
5. CTI or CRM applications used						
6. Web and email applications used						
7. IVR and call flow documented						
8. Network design and configuration						
9. Forecasting call volumes						
10. Use of ACD						
11. Link to other technologies (desk top fax, voice over protocols)						
12. Furthers self service usage						
13. Web self service						
14. Electronic displays on service level activities						
15. Availability of electronic resources						
16. Tools to provide automated standard response						

Elements of Efficiency – Performance Metrics	0	1	2	3	4	5
1. Average speed of answer						
2. Abandonment rate						
3. Call volumes by representative, team and centre for period						
4. Average time spent in queue for period						
5. Longest call for period						
6. Average call length during period						
7. Average time spent in 'work mode' after calls by representative, team and centre for period						
8. Average time spent in 'available' mode waiting for calls, by representative, team and centre for period						
9. Adherence to schedule						
10. Average talk time						
11. TSF or service level						
12. True calls per hour by representative						
13. % of calls resolved in the IVR						
14. Busy signal						
15. Call monitoring and coaching sessions per representative						
16. Productivity scatter diagrams by period						
17. Total calls offered to the organization (including peak call times and base staffing requirements)						
18. Cost per Call						
19. Cost of Recruitment						

20. Electronic support request acknowledgement						
21. % of calls answered						
22. Average time to abandon						
23. Number of calls routed						
24. Average handle time						

Elements of Efficiency – Program Leadership	0	1	2	3	4	5
1. Multi-site strategy defined						
2. Fiscal attentiveness						
3. Business requirements and direction defined (short term, long term)						
4. Projected costs (direct and indirect) of the program						
5. Education strategy						
6. Employee recruitment and retention strategy						
7. Strategy in place to define how processes are improved to achieve better performance						
8. Risk management strategy						
9. Core process capability is responsive to meeting evolving organizational needs						
10. Organization is able to meet client variability						
11. Requirements by regulatory bodies are met						
12. Documentation standards and processes exist						
13. Workplace preparedness and contingency in place for performance continuity in event of disaster						
14. Appropriate levels of security and confidentiality are ensured						
15. Operational guidelines and protocols are available						
16. Call protocols are available to guide health line interactions						
17. Quality assurance strategy						
18. Resource management (standardization and approval processes) relevant to the accepted standards of care						
19. Strategy established for ethics, patient rights, privacy and confidentiality						
20. Caller access strategy						
21. Support and access to medical directors and other professional stakeholders						
22. Use of framework to track performance						
23. Quality improvement goals established for all levels of the organization						
24. Operational plans developed that link with strategic plan						
25. Operational plans includes some quality data, financial modeling, customer experience feedback and employee survey results						
26. Results of employee satisfaction surveys are actioned and tracked						
27. Benchmarking information and best practice data are used to help drive continuous improvement						
28. Customer service standards are identified and managed by the organization						
29. Relevant committees established						

Elements of Efficiency – Caller Experience	0	1	2	3	4	5
1. Ability to receive caller feedback (satisfaction and dissatisfaction)						
2. Proactive caller satisfaction survey						
3. Tracking of complaints and compliments						
4. Consistency and scripting of calls to appropriate answering groups or representatives						
5. Availability of self service options						
6. Follow-up (outbound) calls in response to messages left						
7. Ability to meet caller expectations						
8. RANS/Scripting, IVR menus easy to understand						
9. Availability of contact information						
10. Senior management is approachable for customer issues and resolution						

Elements of Efficiency – Facilities	0	1	2	3	4	5
1. Ergonomic guidelines						
2. Environment conducive to team building/seating/design						
3. Consideration for expansion for increased call volume, staff, seats						
4. Work station space, partitioning, lighting						
5. Cable management system						
6. Storage and personal space allocation						
7. Security						
8. Sound/noise considerations						
9. Workplace safety						
10. Workplace emergency preparedness						
11. Access and security of computer resources						
12. Resource accessibility						
13. Infection control related to shared equipment (telephones, headsets, computers)						
14. Access to personal facilities						
15. HVAC system						
16. First Aid response						

Elements of Efficiency – Organization Agility	0	1	2	3	4	5
1. Transition or organizational readiness plan for expansion/integration of new services/programs						
2. Defined strategic planning process, including project management						
3. Identification of internal and external factors that influence the organization's program parameters						
4. Program competitors and/or collaborators identified						
5. Operations capability defined (speed, responsiveness and flexibility)						
6. The organization actively markets services to build customer base						
7. Linkage and communication of data between the call centre and other supporting stakeholders						