Case Study

Telephone calls no longer “drop out” of automatic call routing

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Project background

A life insurance and pensions provider was not always able to direct policyholder calls to the right department, resulting in customer frustration and the extra cost of a “call divert” team.

Problem

Following a reorganisation, departments such as policy surrenders and death claims handling became responsible for taking telephone calls specific to their area, whilst continuing to process their administration work queues.

This reorganisation resulted in issues with the Customer IVR (Interactive Voice Response) telephone system. Policyholders were given four main options to select from. If a Customer did not select one of these options, the calls ‘Dropped out’ into the ‘Auto-Drop’ queue. As a result a team of call divert staff had been set up to deal with such calls and redirect them to correct internal departments.

Over 22% of policyholder telephone calls “dropped out” of the automatic call routing process. The Six Sigma Green Belt running the project needed to establish operational definitions.
Drop out was defined as when a customer did not select any option or selected “other” from the High Level menu that call would be classed as a drop out call. The call would also be classed as a drop out if the customer failed to select an option in the low level menu.

A high level menu was defined as the first set of options. A low level menu was defined as a sub menu for each option.

Solutions

The Six Sigma project team of customer service advisers, auto drop out team and specialist internal departments, established customer requirements including all calls routed to competent agents in the correct department and clarity of the IVR message.

The team logged the additional hours worked answering Auto Drop calls, the effect of unclear IVR messages resulting in a manual process for call routing, the additional effort in transferring calls to the relevant department from the auto drop queue, calls waiting to be answered in the auto drop queue and the cost and effect of using two processes to handle one input.

The measurement system was checked with a Gauge R & R study. The team then checked the customer facing processes used by five competitors and mapped the process in micro detail to establish best practice.

After data collection and hypothesis testing of what happened to calls by group and product type, the team discovered that 49% of calls dropping out were maturity claims related. FMEA analyses showed many customers did not select an option as they were either waiting for an option to hear the message again or could not hear a suitable option for their needs.

Option one was changed to read “If your call is in relation to a claim or enquiry for a surrender, bereavement or maturity payment please press one”. Callers were also provided with an option for their policy type.

Business benefits

The number of telephone calls that “dropped out” of the automatic call routing process reduced by 408,000 calls per annum, freeing staff to concentrate on better customer service for the callers who now got through first time.

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