

CASE STUDY

THE NFP BENEFITS COMPANY

Feedback Scores

100%

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I learned a lot about engagement + how to ask questions. I really enjoyed the 'mock' discussions and presentation outline + practice.

Shed light/different views on managing clients, presentations, what to address when presenting (how to put this together).

Learned very helpful communication, presentation tips I can use in future client meetings/correspondence.

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The Opportunity

This client has been Canada's only national not-for-profit (NFP) health and dental benefits specialist. Their most recent focus is on clarifying their brand and their value to the marketplace. A key part of this strategy is to ensure the level of service delivered by their reps, advisors and agents were consistent when dealing with their partners and consumers.

To execute on this strategy, management was seeking training in order to elevate the skills of their employees, and to meet the demands for their customer service professionals.

The Customized Solution

To create a training program that was strategically aligned to the strategy, CSPN first created and executed a customized review process. This involved undergoing an extensive investigation of the current client base in Level 1 & 2 customer segments and to ensure that the learning experience related to the participants. The review uncovered key areas of excellence that the client teams need to focus on in order to deliver great service. Once the review and needs assessment was complete, a customized program was developed which focused on delivering consistent, responsive customer service. Specifically, this program focused on topics including strong communication skills, delivering service to internal and external clients, teamwork and telephone etiquette. Some additional aspects of focus are:

- A service model
- A model around handling difficult conversations and clients
- Time-management/productivity/best-practices
- Email etiquette
- Effective presentation strategies

The Results

The customized approach allowed for CSPN to target and efficiently deliver an experience that worked for the large groups of participants that went through the training. Training went so well that CSPN was called back to deliver the designation to various locations nationally.

Benefits Included:

- Increased customer engagement and NPS
- Deeper knowledge of what customer service means within the health care industry
- Translation of knowledge to better service customers
- Learning opportunities that aligned with their larger learning management system
- One-on-one coaching for select high performers
- Overall increase in customer satisfaction and service delivery