



CALL CENTER GET WELL PLAN UPDATE

November 15, 2023

KEY STATISTICS ON CALL CENTER PERFORMANCE

Factor	2019 Baseline	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct ME	Oct Plan
Union Headcount* + Convergent	132	147	142 + 9	140 + 9	135 + 31	138 + 31	128 + 31	122 + 30	116 + 31	120 + 31	150 + 16	101 + 16
Rep. Average Speed of Answer	0.6 minutes	5.9 minutes	5.8 minutes	5.7 minutes	2.1 minutes	2.4 minutes	3.2 minutes	4.0 minutes	3.8 minutes	3.9 minutes	2.9 minutes	3.1 minutes
% Calls Answered in 30 Seconds	76.6%	35.3%	33.9%	30.7%	56.5%	54.4%	47.3%	46.1%	46.9%	44.0%	50.6%	46.0%
Rep Call Volume '23 Versus 2019	1,234,293**	97,426	88,243	111,311	84,604	103,704	101,611	107,882	117,168	102,589	104,084	104,358
	1,351,945	112,542	101,943	100,683	99,835	105,071	106,238	130,227	130,371	117,791	133,418	133,418
Average Handle Time (minutes)	6.0	7.4	7.0	7.7	7.3	7.1	7.0	7.3	7.2	7.1	7.0	7.1
Rep. Abandon Rate %	1.8%	15%	15%	15%	6%	6%	9%	11%	10%	10%	7%	8%



*Headcount is # of employees on staff; a portion are in training or on LTD

STAFFING

Increase Call Center Staff

- In September, two classes started with a total of 33 full-time agents present in the office. The first group of 20 agents started on-phone training phase in early November, resulting in a fully insourced use of staffing.
- The second group of 13 staff will complete all associate work and then go on the phones.
- Currently recruiting additional agents for January 2024 training.
- Hired one external trainer and actively recruited a second trainer from within the union.

Improve Staff Utilization

- Adopted proactive approach to ensure that the workload is handled effectively by responding to changes in call traffic patterns as they arise.
- By analyzing and staffing for peak days and hours, such as Mondays and Tuesdays, overtime is now managed more effectively.
- Currently evaluating call center hours to improve staff utilization and availability during peak periods.

Conduct Organization Assessment

- Organization assessment in progress to identify when and how to support call center operations during surges.
- Assessing opportunities to utilize the customer office staffing or part-time staff for surge and enhance customer transaction effectiveness.

Enhance Hiring-to-On-phone Process

- Currently piloting the tiered call center agent training and onboarding approach (i.e., associate level, full rep).
- Currently reviewing phone training, QA metrics, and mock calls to be added to the current training curriculum.

CALL VOLUME

Enhance Workforce Management

- Began adjusting the staffing requirements by analyzing the call driver activities and closely monitoring the intraday metrics.
- Revised forecast model to monitor rolling 18-month projected agent attrition and right sizing using inputs from historical performance.
- Implemented enhanced work force management tools as part of Call Center as a Service (CCaaS) project that went live in November. Will require a build out of historical data.

Reduce Repeat Calls

- Deployment of the new CCaaS system fixed the callback assist functionality.
- Management is currently considering 100% Quality Monitoring recording with synchronized screen capture.

Improve Management & Monitoring of Call Volume Drivers

- With the guidance of the new Call Center Director, the management team is now better equipped to focus on and manage the necessary key performance metrics on a daily basis.
- Convergent's performance is being closely monitored, with emphasis on metrics such as Average Handling Time (AHT) and call transfers.
- Since implementing daily monitoring, coaching, and accountability measures, the performance of the Convergent team has significantly improved.

AVERAGE HANDLE TIME AND SHRINKAGE

Leadership Development

- Implemented training and coaching program to support new supervisors and workforce management.
- The new director is attending ongoing supervisory training with the call center manager to learn staff capabilities and emphasize the need for performance improvement.

Improve Work From Home

- The management team is considering a performance-based model to qualify for remote work.
- This work arrangement may require meeting certain call center performance metrics, such as AHT, to qualify or maintain it.

Performance Management Enhancements

- A color-coded performance metrics reporting template is used to highlight successes, areas for improvement, and corresponding action steps for agents.
- Since implementing changes around utilizing technical time off phone, there has been a 40% reduction.
- Established daily monitoring, coaching, and accountability for the Convergent team has resulted in significant improvements in their overall performance.

NEXT STEPS

LIPA is pleased with the actions taken and analysis performed in the last two months.

LIPA looks forward to the continued collaboration with the Get-Well Plan team members and the new Call Center Director as we move forward together.

Actions Going Forward Will Include:

- Continue monitoring and analyzing the Bi-weekly Metric Report for trends and deviations.
- Assess the effectiveness and impact of the current tiered pilot for adjusting January on-boarding.
- Assess the potential consequences of changing the operating hours of the call/contact center.
- Refine proposed tactics based on performance trend data.
- Monitor progress on the January agent on-boarding.

THANK YOU!

Questions?