

**Solution**

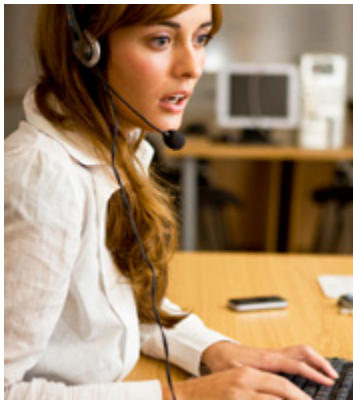
- Aspect® Unified IP®
  - Advanced List Management
- Productive Workforce™
  - Aspect® Quality Management
  - Aspect® Workforce Management
  - Aspect® Performance Management
- Aspect Applications Foundation
  - Microsoft Dynamics CRM for Aspect Unified IP

**Results**

- Increased visibility into agent activity
- Improved agent satisfaction
- Reduced costs
- Enhanced service differentiation
- Improved customer experience
- Developed deeper customer relationships

# LifePlans

Health and long-term care risk management company experiences greater visibility and improved processes with a unified solution

**The Company**

Since 1987, LifePlans Inc. has been helping long-term care (LTC) insurers and health plans to manage risk through innovative, evidence-based solutions. The company's industry-leading services drive demonstrated improvements in health outcomes and business performance.

With two offices located in Merrimack, NH and Waltham, MA, LifePlans has 25% of its employees working as dedicated agents in a traditional call center. Among other things, these agents provide telephonic risk management services to LTC insurers and health plans. In some cases, they act as a front and back office staff managing everything that an insurance company does without selling policies. They take appointments, underwrite and administer policies, and manage claims.

At LifePlans, outbound calls outnumber inbound traffic five to one. There is significantly more outreach to long-term care clients with the goal of scheduling phone interviews and conducting other health risk assessment activities that are set up through their contracts.

**Challenges**

LifePlans had a strategic goal of expanding their risk management business to meet the growing needs of elders at risk for requiring long-term care, whether insured by an LTC company or a health plan member. To do this it was imperative for the company to know how to underwrite or measure this risk for an individual, which is core to their business. In addition, a more reliable method for capturing all critical information received during a customer interaction would allow agents to more easily manage the details for better results.

As an organization that continually welcomes new clients and new processes, LifePlans' agents deal with insurance and health plan consumers, policy holders and their relatives, doctors, agents, facilities and insurance company home office employees. An array of clinical and non-clinical staff interacted with the agents who were constantly going back and forth in an effort to complete services. In addition, every department had their own processes in place along with complex rules and requirements.

Although the organization had always been strong in managing basic customer interactions and knowing specific metrics to track, they had not excelled in analyzing the contact data once it was collected. The complications of this scenario produced very limited agent performance visibility.



LifePlans' contact center infrastructure was becoming outdated and in need of significant system updates, so they sought to reinvent their customer experience strategy from the ground up. To do this, they focused a new initiative on their agents with the objective of giving them visibility into the first points of contact. With fragmented work groups and activities that lacked consistent workflows and processes, the first step of this project was to identify efficiency opportunities.

LifePlans knew they needed to blend their agents' interactions based on multiple channels, contacts and all the different work tasks they encountered during an average day. They also needed to build rules to govern what agent gets a particular call, when they should get it, and when and how to pull leads in real time so they could be sorted and organized for agent assignment.

### Solution

Because of the acknowledged challenges, a critical requirement was to build a comprehensive view of LifePlans' clients that would blend the applicant, policyholder, claimant or member and all associated caregivers, family and other support systems that the agents interact with. They also needed to replace the standalone predictive dialer that was quickly becoming outdated.

After conducting an extensive process of identifying enhancement opportunities, researching the unified communications space and evaluating various solutions and vendors in the market – LifePlans eventually selected Aspect. Their search concluded when they found a solution that provided automated, intelligent, proactive contact strategies to improve customer experiences and sales outcomes.

"Microsoft Dynamics CRM for Aspect® Unified IP® has helped us improve customer care by creating a more efficient workflow for a better agent-customer experience. And our transition to this solution was seamless because Aspect took a hands-on approach from day one, using a project methodology and functionality that was a perfect fit for LifePlans. It was a highly structured process and they were very dedicated to the implementation, helping us make everything come together and work," said Steve Mclsaac, LifePlans VP of Information Technology.

With help from Aspect's Microsoft Professional Services team, LifePlans implemented Microsoft Dynamics CRM for Aspect Unified IP. Aspect Unified IP is a vital component of next-generation customer contact and when brought together with Microsoft Dynamics CRM, organizations gain a versatile foundation for new levels of cost savings, productivity and business efficiencies that grow customer value and foster long-term loyalty.

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*-Steve Mclsaac,  
VP of Information Technology,  
LifePlans*

By combining Aspect Unified IP's unified multichannel and blended capabilities with Microsoft Dynamics CRM, agents have the ability to maintain a central customer record with interaction tracking and workflow automation with screen pop capability. This integration is impactful in that it truly supports inbound and outbound calls through a single desktop view. Agents have a consolidated and complete view of their customer data.

LifePlans needed their outbound campaigns to connect with the right people and support effective communications about health risk assessments or ad hoc issues that arose. They also needed to perform inbound activity such as taking customer service calls. With the new solution, LifePlans' agents are able to seamlessly handle both inbound and outbound tasks and as a result, the company has improved agent productivity as well as customer service significantly – especially by reaching the right contacts.

By having a better structure in place, callers have greater ease-of-use and less stress because they will not suffer transfers between agents who don't have visibility into each other's availability and qualifications. If an agent can't handle an initial call, they can locate and transfer the caller to a better suited agent within the unified system. This proves to be extremely helpful in critical scenarios where timing is so important.

An auto-dialer also supports agents' efficiency and productivity. Additionally, Productive Workforce™ allows LifePlans to provide managers and agents with the insight, tools and processes to optimize resource utilization and adopt a continuous improvement culture with workforce management, quality management and performance management capabilities.

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## Results

Since rolling out the Aspect solutions at LifePlans, the company has gained the visibility they were looking for. Care managers have a much deeper view into their customer interactions with a line of sight into every person involved or related to a case. Information is not only more comprehensive and accessible, it's more easily transferred from one clinician to another. As a result, LifePlans has improved the overall agent and customer experience as well.

The Microsoft Dynamics CRM for Aspect® Unified IP® offering provides many benefits as it seamlessly unites the contact center and enterprise and creates a single interface, equipping agents with more information and resources that deliver a better customer experience. The robust integration between Aspect Unified IP and Microsoft Dynamics CRM provides a complete 360-degree view of customer interactions and contact opportunities, along with agile contact control, maximizing customer value and retention. The solution combines IM, presence, social and collaboration capabilities to enhance the agent's day-to-day contact center functions and make workflow more efficient.

LifePlans employees and partners, including call center agents and managers, have been extremely happy with the change. The solution has given managers more intelligent, actionable insight through greater visibility into their agents' performance and their productivity. Managers have been able to do configurations and make changes on the fly to dial lists, and agents have experienced increased job satisfaction and a greater sense of empowerment.

In addition, LifePlans has reduced the number of people focused on repetitive tasks, allowing subject matter experts and employees with broad policy knowledge to devote more time to customer interactions. The company also employs non-traditional contact center personnel such as clinicians who conduct follow-ups for post-release assessments and reach out to those involved in the care of people receiving long-term care benefits or chronic care services. These team members are in the process of moving to Aspect Unified IP today.

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### About Aspect

Aspect is the only software company with a fully-integrated interaction and workforce optimization platform for enterprise contact centers globally that need to profitably (and seamlessly) orchestrate people, processes and touch points in an era when the contact center is the new center of the customer experience. For more information, visit [www.aspect.com](http://www.aspect.com).

