

# “Project Vision”

## Category: Healthcare

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Analyzing linguistic call center data to improve customer experience and increase Rx fill rate

# Client Testimonial

*“So glad to hear about your nomination for an award for Project Vision from the Digital Analytics’ Association! The work you did was amazing and continues to shape our vision for customer interactions and drive investment decisions. You have our full support for submitting the case study for consideration.*

*I look forward to continuing the work with you and your team. You guys have been fantastic. From the beginning it was clear you had an understanding of the insights we were needed and quickly developed an analytical model to bring them to light.”*

-Heith, Product Development Executive  
Fortune 500 Healthcare Client

# The Situation

A large percentage of our client's prescriptions of biologic therapy were not being filled by patients. Our client lacked the data to identify where in the patient experience people were falling off, but knew that something was happening during patients' experience with their call center, a key touch-point in their journey from script to therapy.



# The Origin of Project Vision

In 2016, a study was run to identify what student athletes want to hear from their parents after a game to keep them motivated to continue playing. They found that 6 words make all the difference:

**“I love to watch you play.”**

Using this as a metaphor, our client (a pharmaceutical manufacturer of infusion therapy) tasked us with the mission to help them find the right words that would keep patients of serious auto-immune diseases motivated to fill their prescriptions and provide the kind of empathy and assurance that would help them feel confident at an uncertain moment in their lives.



# Solution: Project Vision

**What is Project Vision?** → An ongoing analysis of linguistic call center recordings and transcripts to identify the right words to say on call to improve customer experience and increase prescription fill rate.

**Why Call Center Data?** → Our clients needed a measurement solution that departed from traditional call center metrics and would make sense of qualitative interpersonal dynamics that go unrecognized in the patient journey.

The methodology on our subsequent slides demonstrates our innovative analytics approach to this challenge.

# Methodology

1. Created a framework to quantitatively measure, assess and learn how the call center experience is delivering on the organization's core CX pillars: Simplicity, Assurance and Intuition
  - Within each CX pillar, we developed a grid (see next slide) of 15 brand-specific metrics to measure call quality and experience, and score each call on a 1 – 5 scale. This scale is known as our “Vision Score”
2. Conducted auditory and textual analysis of calls between customer service reps (CSRs), health care professionals (HCPs) and patients through this framework, tallying each metric to roll up into the “Vision Score”
  - We listened to every call recording and conducted Natural Language Processing (NLP) and cluster analyses on every call transcript
3. Delivered benchmarking, performance reporting, insight mining and experience-improving solutions across 5 project phases, from January 2017 – February 2018

# Measurement Grid

Call quality metrics were developed to measure language, engagement, and tone across each CX pillar.

Call Evaluation Pillars					
	Language	Engagement	Tone	Vision Score	
CX Pillars	Simplicity	<ul style="list-style-type: none"> <li>• CSR Repetition</li> <li>• Caller Repetition</li> <li>• CSR Info Relevant and Concise</li> </ul>	<ul style="list-style-type: none"> <li>• CSR Answer Clarity</li> </ul>	<ul style="list-style-type: none"> <li>• Hold Time</li> <li>• Number of Transfers</li> </ul>	1 - 5
	Assurance	<ul style="list-style-type: none"> <li>• CSR Net Trust Phrases</li> </ul>	<ul style="list-style-type: none"> <li>• Caller Syllabic Response Variation</li> <li>• Caller Asking Questions</li> <li>• Polite Caller Phrases</li> </ul>	<ul style="list-style-type: none"> <li>• CSR Net Authentic Empathetic Phrases</li> </ul>	1 - 5
	Intuition	<ul style="list-style-type: none"> <li>• Appropriate Verbal Mirroring</li> </ul>	<ul style="list-style-type: none"> <li>• Scripted vs Natural Index</li> <li>• Strategically Useful Info</li> </ul>	<ul style="list-style-type: none"> <li>• CSR Pace Mirroring</li> </ul>	1 - 5

• Metrics to score call quality against

# The Vision Score

A numerical score was given to each pillar on each call, creating a composite call score. Scores are based on a combination of functional and emotional needs being met.

Rating	Description
1. Poor	"I did not get what I needed from this call, and feel negatively about my experience with this brand."
2. Subpar	"I got a few of my questions answered, but I am still concerned and didn't have a pleasant experience."
3. Fair	"I got what I needed, but nothing stood out to me—good or bad. I will not remember this call."
4. Good	"I got done what I needed to do. The CSR was nice and call was pleasant."
5. Exceptional	"All of my questions were answered, and I felt attended to by this brand. I'm glad I called."

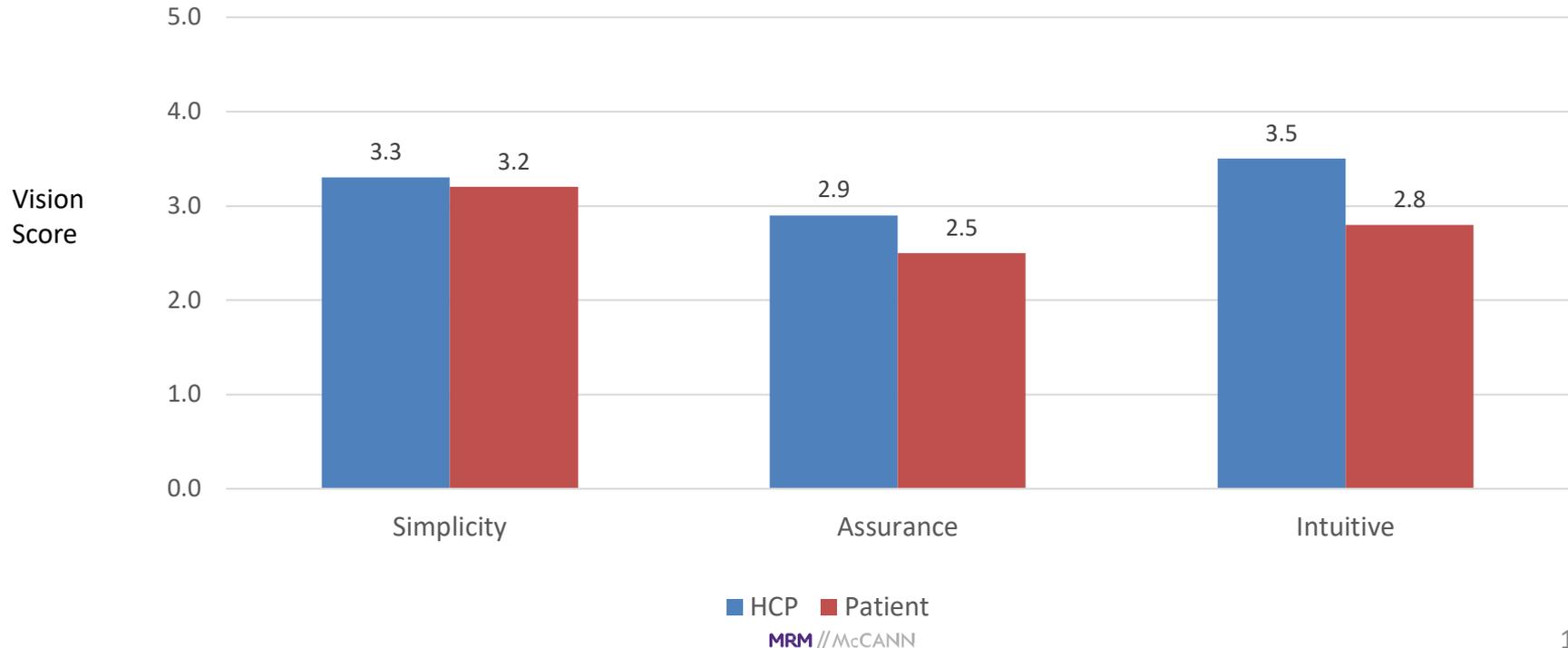
# Weighting

To ensure that the most important metrics were contributing commensurate value to the evaluation of each CX pillar, weighting was assigned to each CX-Call Evaluation Pillar.

Call Evaluation Pillars			
	Language	Engagement	Tone
Simplicity	50%	30%	20%
Assurance	35%	30%	35%
Intuition	35%	40%	25%

# Example: Patient vs HCP scores

The client was delivering a better call experience to HCPs than patients across all three CX pillars.



# Example: Intuition Metrics in Action

**Metric:** “Scripted vs. Natural Index”

**What does it measure:** does the CSR revert to scripted language or do they speak naturally?

**Calculation:** Vision Score (1-5)

**Example** (charts, right)

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**Metric:** “Strategically Useful Info”

**What does it measure:** does the CSR provide strategically useful information and resources, especially when unprompted?

**Calculation:** Vision Score (1-5)

**Example:**

*CSR: “Oh, it's okay. You don't need a card to enroll in the program today and there are several ways to enroll. You can enroll over the phone today. You can go online. You can also download, complete and print the enrollment form from our website, and which do you prefer?”*

**Vision Score:** 5

## Co-pay disclosure, by the script

CSR: “Okay, so looks like you would have coverage through your pharmacy benefit which is through...”

Patient: “Okay.”

CSR: “And you have an out-of-pocket maximum of \$1,000, which so far you've met \$200—”

Patient: “Out-of-pocket \$1,000?”

CSR: “--\$1,000 for out-of-pocket, mm-hmm.”

Patient: “I ain't going to pay that much.”

CSR: “Yeah, that's yearly. So that's your out-of-pocket maximum for the year.”

Patient: “I don't pay anything for my medication. I pay a little co-pay. The most I've ever paid is 50 bucks for it, for medication.”

CSR: “Oh okay, because what I was going to say is so far what you've met towards it, after we spoke to your insurance company, you've met \$244.72 towards it so far.”

Patient: “Yeah, so it'll cost me almost another \$800, 750 more.”

CSR: “And for the medication, you know once it is approved, you'll be responsible for a \$200 co-pay for the out-of-pocket.”

**Vision Score:** 1

## Co-pay disclosure, improvised

CSR: –“I wanted to reach out to you to try to get you involved in our savings program because they did quote us a kind of a high copay for the medication. So if you get involved-- when you give them the processing information, they only charge you that \$5 copay each time you get the medication.”

**Vision Score:** 5

# Example: Intuition Metrics in Action

## Scripted/Natural Language vs Strategically Useful Info

- Delivering strategically useful info and using natural language are two of the most important things a CSR can do to provide a positive call experience
- There is an overall linear relationship between scripted/improvised language and information usefulness

*Strategically Useful Information*

		<i>Strategically Useful Information</i>				
		No Useful Info	General Info	Some Useful Info	Useful Info	Very Useful Info
<i>Scripted/Natural Language</i>	Highly Scripted	3.0	2.7	2.8	2.6	-
	Scripted	2.8	2.7	3.6	3.1	-
	Some of Both	3.2	3.2	3.3	3.4	3.8
	Improvised	-	3.0	3.4	3.5	4.0
	Highly Improvisational	-	3.4	3.6	3.8	4.2

# Key Insights from Project Vision

Project Phase	Key Insight
Phase 1: Comparing Patient vs. HCP Calls & Benchmarking	While functional objectives are almost always met in calls, CSRs are uncomfortable providing patients with assurance, and often fall back on script-like tonality and behavior.
Phase 2: Analyzing Patient Termination Calls	Affordability and competitor therapies loom large as reasons for patient termination, yet most patients are not being engaged by CSRs in a conversation about why they might not be pursuing treatment.
Phase 3: Analyzing Patient Initiation Calls	Initiation calls are the first contact patients have with brand. CSRs who are able to intuitively identify patient needs and familiarity with biologics provide a much better call experience for patients.
Phase 4: Connecting Script Outcome to Calls	Keeping information easy to digest, and focusing on empathy, may correlate to positive script outcomes for patients.
Phase 5: Comparing Call Centers	The introduction of a new call center, whose CSRs are likely to have worked as pharmacists before working at a call center, revealed a much higher degree of expressed empathy and assurance across calls.

# Results

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- ✓ Project Vision led to the brand's new patient-first program, which has yielded a **52% lift in script fulfillment rates** over industry benchmarks
- ✓ Client has invested **\$15MM** into a new CX-focused call center provider, a nurse navigator program and other patient experience initiatives, as a direct result of the Vision learnings
- ✓ Project Vision informed major revisions to call guides, positively impacting **1,600 patients per month** since implementation
- ✓ Vision has **revolutionized** the way that our client interacts with patients at every touchpoint post-script: moving from a behavior-change model designed to persuade patients to go on therapy for those they love, to a **care-first model** that shows patients that they are not alone in their journey. More empathy, more assurance, more human