

Note:

The following slides are selected **excerpts from a larger presentation deck.**

Content has been modified and anonymized to preserve confidentiality.

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Creating the Exceptional Molina Contact Center Experience

Executive Readback





Thank You.



Goals for Readback and Deck Overview

Goals for Today

- Review read-back draft and gain feedback
- Discuss action items and solutions (agnostic of Salesforce solutions)
- Outline next steps in our collective partnership

Report Structure

- Executive Summary & Project Overview
 - Workshop Overview
 - Executive Recommendations
- Future Vision and Barriers Readout
 - Industry Context
 - Future Vision
 - Projects Overview
 - Business Value Highlight
- Prioritized Roadmap to Future State
 - Quick Wins & Phased Roadmap
 - Action Items
- Best Practices in Action & Next Steps

Report Overview and Executive Summary



Our Journey Together

How Today Fits Into Our Broader Partnership



Contact Center Engagement Readback includes:

- Synthesis from discovery findings
- Analysis of challenges and opportunities
- Map of challenges to prioritized solutions
- Best practice recommendations and examples
- Detailed action items for recommendations
- Prioritized roadmap for action items

**Salesforce and
Molina SMEs and
Technical
Resources spent
time diving into
systems, processes,
pain points, and
successes**

20+

Molina SMEs and
resources involved

17

Quick win
projects
defined

90+

Pain point and
solutioning sticky
notes used

3

Deep dive
discovery
sessions

>30

Identified
improvement
projects

11

Salesforce
cross-cloud
experts and
engineers

Engagement Goals

How Today Fits Into Our Broader Partnership

Molina and Salesforce will co-create a future state vision to achieve:

- 01 Improved member, agent, and provider experience, with a focus on the contact center
- 02 Enhanced Medicare Star Ratings and First Call Resolution by targeting high-impact opportunities
- 03 Targeted recommendations for how to use technology to achieve above objectives



Payer Trailblazers Informing Our Guidance



Transparency and Collaboration with 360 Degree Views

XXX personalized email journeys on Marketing Cloud

5 Star Medicare Advantage plans

- Used Salesforce as integrated platform for end-to-end experience
- Built mobile platform to increase omnichannel comms



Value-Based Member Care Management

XXX hours saved annually per FTE

Improved outcomes for high-risk members

- Integrated Care Management and outbound comms
- Tailored engagement to member and provider preferences



Integrated, Data-Driven Member Experience

XX% increase in productivity

XX% increase in customer satisfaction

- Integrated all contact center processes into Salesforce as platform
- Used MuleSoft to bring all member data into one screen for agents



Transformed Member Servicing Practices

XX reduced clicks-to-close

XX cases closed

- Brought all interaction and relevant data into single view of member
- Streamlined case flows and menus to reduce clicks to close



Connected Marketing and Sales Platform

XX integrated small group products

XX% increase in automated processes

- Standardized member data and streamlined across systems of record
- Enabled member self-service for personal data management

Humana

Humana Transforms Member Experience with Salesforce

Challenge

- Low first call resolution rates
- Constantly increasing handling times
- Too many systems used by service agents
- High agent turnover and low satisfaction
- Low customer satisfaction scores
- Difficulty interpreting business needs

Solution

- Created a single view of the member by integrating with sources of record
- Surfaced relevant knowledge information while on a call
- Improved call quality and reduced Average Handle Time
- Improved First Call Resolution rates

XXXXX Users

XXX Data Integrations

XX% of member data in a single view

XX% First Call Resolution

XXX Cases Closed

Reduced clicks-to-close from 78 to 43

Rated #1 Customer Service-Newsweek 2019

Rated #1 Health Plan in 2021 Customer Service-Forrester



“Salesforce is making it easy for our associates to focus on our members.”

Customer Name, Customer Title

Key Challenges: Executive Perspective

Molina needs to connect systems in real-time to gain agent and customer trust

- ❑ Agents don't trust the data presented in Salesforce for accuracy or relevancy
- ❑ Connections from other systems are not live/real-time APIs, but rather data pushes
- ❑ Agents work around this complexity with a combination of their own experience and hacks

"Members and providers don't always know the exact reason they're calling, so you have to be able to identify the reason for the call very quickly."

Recommendations:

- Review API connection platform and create real-time system connections
- Implement a steerco with SI partners and Salesforce executive sponsor
- Hold a quarterly feedback meeting with all call center user role levels

Agent hiring, training, and retention is of paramount concern to Molina operations

- ❑ Agent turnover of 9% monthly heavily impacts and drains Molina resources
- ❑ Onboarding and independence difficult to standardize with separated systems
- ❑ Agents desire a fulfilling work experience and easy internal systems to use

"As an agent you have to know how to handle members on their worst days, so it's pretty high-stress."

Recommendations:

- Review onboarding/hiring processes and tools like LMS, ATS etc.
- Reduce barriers to agent independence (e.g. data feeds)
- Create connections between ticketing systems (e.g. ServiceNOW, Appeals) and Salesforce

Leadership recognizes need for actionable data to shift from reactive intervention to proactive anticipation

- ❑ Leaders need more insight into agent time to set patterns and expectations
- ❑ A better and more proactive/connected experience will translate to members/providers
- ❑ Reporting and analytics as well as real-time data feeds will improve insights into performance

"We need the data to show in real-time where we need to make improvements for our front-line service team."

Recommendations:

- Enable event monitoring to provide agent insight and hone processes
- Explore persona/profile access standards for user roles
- Review Agent journey to highlight pain points and make updates

How do we measure success?

Measures to prioritize:

- Increased First Call Resolution (FCR)
- Decreased Average Handle Time (AHT)
- Increased Net Promoter Score (NPS)
- Decreased Agent Attrition

What could the result be?

+\$XXX

Potential additional Medicare Quality Bonus payments (for 4+ Stars)

\$XXX

Potential annual savings from staff attrition (10% drop in monthly attrition)

>1 pt

Potential improvement in STAR ratings

The payer industry is seeing some significant changes this year that will have large scale impact on Molina's business.

01

Star Ratings and other satisfaction scores are evolving to weigh more on CX (CAHPS, SDoH)

02

Payers are putting a **laser-focus on Medicare Adv. and Medicaid**, heating up competition

03

New market entrants are upending existing market share and members are less brand-loyal than ever

04

Molina's contact center agents will see an uptick in complex, confused callers as the **PHE Medicaid Redetermination** begins

05

Better-trained agents can improve **HEDIS, CAHPS, and NPS** and tend to turn over less, **reducing administrative costs**



MEET **AUDREY**

Audrey started at Molina Healthcare 6 months ago. She completed onboarding but is still grasping the intricacies of benefit verification.

There is a lot of information Audrey needs to track: HIPAA verification, member information, tasks and to-dos, and case escalation details. She needs a single repository that enables her to resolve member inquiries.



MOLINA HEALTHCARE

Search Salesforce

My Performance Summary

% Closed Cases with SLA
73.83%
Vs. 180 Days Ago: 74.53%
Team Average: 75.19%
Rank: 61

Average PSAT
51
Vs. 180 Days Ago: 50.54
Team PSAT: 49.96
Rank: 21

First Call Resolution %
63.02%
Vs. 180 Days Ago: 62.19%
Team Average: 66.3%
Rank: 99

Back Log Cases
49
Prioritize my Open Cases

Closed Cases Volume vs. Team Average

By Case Category

Category	Count
Membership/ Contract Renewal	22
Appointment Creation	33
Priority Search	18
Billing Inquiries	20
Status of a Prescription	20
Medical Records	20
Access to Information	16
Questions about Coverage	24
Explanation of Coverage Options	16
Membership Card Status	18
Life Status Change	39

My Status

Cases - Available since 9:53 PM

6 open items 30 % capacity

Activity Scorecard - Last 30 Days

Cases Assigned Today: 18

Cases Closed Today: 13

90 cases closed (Personal Best: 90)

103 calls logged (Personal Best: 120)

98 emails sent (Personal Best: 150)

23 tasks completed (Personal Best: 35)

Today's Tasks

- Call Cigna about new patient. Hiram Mejia 00001741 Today
- Update patient with drug discount programs. Derek Choi 00001743 Today
- Call patient back with follow up financial information. Joshua Dixon 00002149 Today

Phone Omni-Channel Macros My Cases

Actionable Analytics

Future State: When Genesys WFM is integrated to SFDC, Audrey can start her day by reviewing her performance metrics, open tasks & cases. She begins by catching up on her prioritized open action items.

Thank You.

