How McIntosh & Associates and Mivation helped a national health care servicer refocus, reduce costs AND boost productivity.

50

0   **99.9%**   **100**

Productivity

Overview

The client, a rapidly growing health care servicer with national call centers, was interested in increasing the efficiency and effectiveness of their operations to support their growth. Reporting had become difficult as data was distributed across heterogenous telephony and scheduling systems. There was simply no easy way for managers to properly evaluate their team's performance or assist with coaching. It was also difficult to motivate representatives as they had no real-time visibility into their performance relative to their goals or how they were performing against their peer group.

Identify Problems

Identify ▶ **Propose** ▶ **Deliver**

Data Reporting & Analysis

McIntosh & Associates, a premier call center consulting firm, discovered that the client was wrestling with an assortment of separate, disconnected data systems that made collecting and analyzing representative's performance data a time-consuming, manual and error-prone process. There were multiple distinct points of failure dependent upon separate individual process "experts".

> "We are seeing a clear correlation between Racing Snail and performance. The more they use it, the better they perform – up to 45% better!"

Compensation Plan

The client's representative compensation program was loosely organized, included numerous uncoordinated "SPIFF" promotions, and had little direct relationship with actual representative performance. It had become difficult to assess both the cost and the effectiveness of the compensation plan.

Representatives did not have real-time visibility into either their performance or their commissions unless managers proactively showed them the data, or they manually tracked their own performance in spreadsheets. Official performance stats and commission results were not available until midway through the following month. This delay meant that representatives received the data when it was too late to impact their behavior – the commission period had already closed.

Company Profile
National call center specializing in appointment-setting services for the healthcare industry. Company has several geographically dispersed locations in the US.

Challenges
- Heterogenous Systems
- Lagging data reports
- Manual data analysis process
- Poor alignment of commission plan to company KPIs
- Limited and delayed visibility into performance reporting

Solution Providers
- McIntosh & Associates: Call center consulting services
- Mivation: Performance & Motivation software

Goals
- Manage according to KPIs
- Automate and consolidate data for easy reporting & analysis
- Reduce cost of commission program
- Provide real-time comp visibility

Results
- Sustained goal attainment
- Increased productivity per hour
- Management focusing on coaching and best practices

Propose Solutions

Data Reporting & Analysis

- McIntosh recommended automating data collection and integrating data systems into one consolidated source for easier analysis and reporting.

- Narrowed the client's focus to a small set of targeted KPIs that were most directly related to the client's success.

- Determined benchmarks and tenure-based goals to provide a clear and sustainable path to improved performance.

Compensation

- McIntosh recommended a KPI-focused commission plan designed to drive the right behaviors e.g., ensuring that appointments set convert to appointments kept.

- Consolidated and streamlines compensation plan while substantially reducing the cost of the program by more accurately matching compensation with contribution.

- Recommended real-time commission reporting and visibility for both managers and representatives.
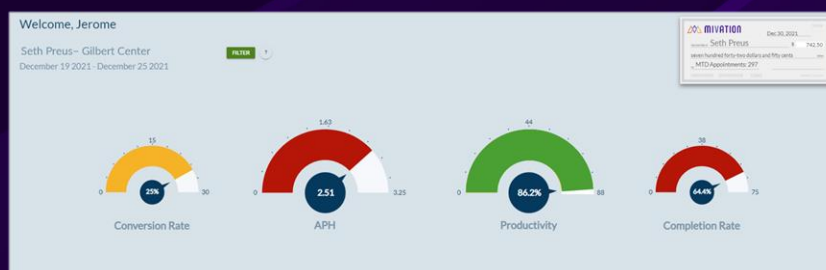
Deliver

Data Reporting & Analysis

Mivation, a performance & motivation SaaS company, consumed 6 separate data feeds to consolidate performance data into its motivational tool, Racing Snail. Intuitive dashboards and configurable reports enable managers to view the KPIs and benchmarks to assess performance and provide real-time coaching as appropriate. Managers have access, in real-time, to data including:

- Performance by organization, location, team, manager, or individual caller
- Rankings by KPI's
- Summary gauges that instantly communicate current pacing against goals

Compensation

- Racing Snail calculates representative's performance and commissions in real-time. Representatives access their dashboard where they can see their current performance status and their earnings.

- Current commissions are displayed by a check to help the representatives visualize the rewards and impact of their efforts.

- Intelligent goals (differing by tenure and fulltime/parttime status) ensure that performance expectations match abilities.

- Data transparency enables both managers and representatives to evaluate the relative performance of individuals or groups.

Sarah Fox, Partner at McIntosh & Associates: "The data was challenging, but Mivation understands how to deliver performance data and was able to deliver our vision."

Client: "McIntosh over-delivered; they not only delivered cost savings but also increased our top-line performance and capacity!

Ensure they know what they care about so that they want to do something about it!

Results

Information is the root of Motivation

Whatever the setting, people don't care if they don't know. By providing real-time transparency to performance data, Racing Snail lays the foundation for the motivational process – knowing. By ensuring that they know relevant data, whether it relates to their goals, their earnings, or their performance versus their peers, we increase the chances that they will care and want to do something about what they know. This is the motivational pathway.

Client managers are now able to effectively coach their teams and effect real change.

Representatives are motivated to perform as they see how their efforts impact their income as well as how their performance compares to that of their peers.

45%

27%

16%

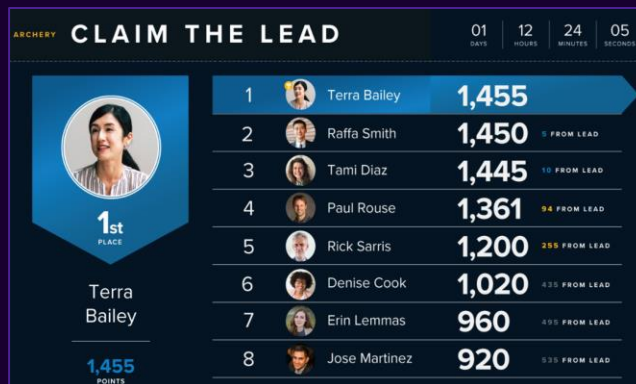| 1x Week	3x Week	5x Week	10x Week
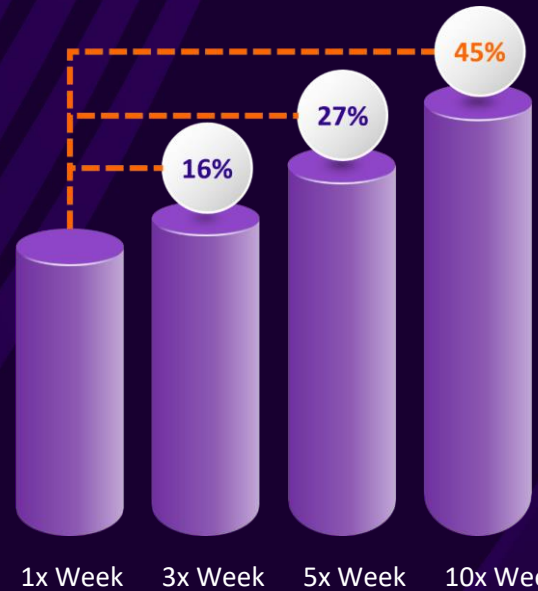
Representative Logins vs Appointments Set

The more often that representatives login to Racing Snail, the higher their performance. Knowledge drives motivation. The greater the visibility to performance data, the greater the impact to motivation.

What's Next

Gamification

Competitions, personal records, wheelspins and other gamification methods will deliver another boost to both productivity and morale.

ARCHERY CLAIM THE LEAD

01 DAYS	12 HOURS	24 MINUTES	05 SECONDS

1st PLACE

Terra Bailey

1,455 POINTS

1	Terra Bailey	1,455		
2	Raffa Smith	1,450	5 FROM LEAD
3	Tami Diaz	1,445	10 FROM LEAD
4	Paul Rouse	1,361	94 FROM LEAD
5	Rick Sarris	1,200	255 FROM LEAD
6	Denise Cook	1,020	435 FROM LEAD
7	Erin Lemmas	960	495 FROM LEAD
8	Jose Martinez	920	535 FROM LEAD

Client: "Not only can our managers provide better coaching, but our reps can actually "self-coach" with no input from management. They have the information available to them to make them better at their jobs and to make more money."