CORRECTIVE ACTION PLAN

Plan Name:	Access Dental Plan	Date:	6/20/2023 Updated 10/3/2023
Contract #:	GMC (12-89341) LAPHP (13-90115)	Prepared By:	ADP Contact Center
Contact Name (1):	Liz Bishop	Contact Name (2):	Destiny Rockwood

Call Center Report

Deficiency:

The Access Dental Plan Contact Center is required to maintain an average "P" factor of no more than 7%. The "P" factor is defined as the percentage of connected calls vs. non-connected calls (abandonment rate). Access Dental Plan has been unable to consistently meet the contractual requirement reported in quarterly Call Center Reports.

Root Cause:

The issue was identified by ongoing monitoring of performance metric results. The root cause of the issue was due to the following three factors. Staffing shortages (attrition, unplanned absences and FMLA), an increase in the average handle time (AHT) per phone call, and an increase in overall call volumes- all above and beyond forecasted historical metrics.

The significant factor contributing to the increase in the AHT was attrition of bi-lingual (Spanish) CSRs. As a result of this attrition, the Call Center had to increase its usage of their third-party interpreter vendor services. The AHT increased due to the time required to converse between the interpreter, member, and CSR.

The corresponding high 'P" factor reflecting that callers are disconnecting prior to the call being answered also contributed to an increase in call volumes as these callers often call back into the queue increasing the overall inbound call volumes.

The above issues that were identified are all key components that impact the staffing model forecast. Forecasting staff requirements in a call center has multiple critical components which include the number of calls coming into the contact center, Average Handling Time (AHT), occupancy and shrinkage rates, along with service level goals. Staffing model forecasts are built from the historical results of these components which determine critical staffing needs. Staffing models are continually monitored for unknown call drivers or other unforecasted factors and adjustments are made if there are consistent trends over time that alter the historical metric assumptions.

When there are significant fluctuations in multiple elements at the same time it becomes challenging to quickly recover through ordinary measures. Although the issues were identified and adjustments to the staffing model were incorporated to increase FTE headcount above forecast, it requires significant time to hire, onboard and train critical talent.

References:
- **Appendix A** - Historical trends
- **Appendix B** - Staffing model forecasts
- **Appendix C** - 3rd party interpretation usage

Corrective Action:

At the time these issues were discovered, the following remediation actions were taken:
- Mandatory overtime was implemented.

- Team Leads were pulled from their normal job responsibilities to take inbound calls.
- Customer Advocate team members were pulled to take calls during peak call times.
- Team meetings and coaching sessions were scheduled outside of normal business hours to avoid pulling resources from the phones.
- Review of CSR schedules to optimize start times and improve disbursement of breaks and lunches.
- Immediate coordination efforts began with Human Resources to develop strong recruitment plans to fill staffing gaps.

To address recruiting efforts, the Talent Acquisition/Recruiting function was expanded with the addition of a new recruiter. Direction was aligned to focus on bilingual recruitment for the contact center. The recruitment team utilized outreach to various organizations, including state-specific job boards targeting bilingual demographics, social media, and partnerships with organizations such as Goodwill Industries to tap into new candidate pools. These activities combined with renewed focus on timely follow-up in the recruitment process have led to increased applications and a larger pool of diverse and qualified candidates to choose from.

New Hire Classes
- 6/12/23- New hire class of 6 were hired, 2 are bilingual. Began servicing calls the week of 7/10.
- 8/20/23- New hire class of 10 were hired, all 10 are bilingual. (8 Spanish, 1 Arabic, 1 French) Will begin servicing calls the week of 9/18.

10/3/23 Update: New hire class servicing calls week of 9/19.

To address the increase in phone calls that could contribute to a higher P factor, Access Dental is working with their Voice Services Team to determine the feasibility of implementing a Call Back Feature in the telephony platform. **10/3/23 update: Call back feature successfully developed and in testing. Go live ETA mid-October.**

The above listed activities will remain in place until the P factor normalizes. In addition, AHT will continue to be monitored and specific coaching plans will be developed for CSRs that may not be handling calls efficiently.

The Talent Acquisition team will continue to keep the pipeline open and to recruit ahead of attrition to avoid staffing gaps in the future.

10/3/23 Update: September P-factor results
- **GMC = 3.27%**
- **LAPHP = 1.4%**

Key Milestones:
- 7/10/23: New hire class of 7 CSRs will be servicing calls.
- 9/18/23: New hire class of 10 CSRs will be servicing calls.
- End of month review of results of AHT coaching throughout month.

References:
Appendix D - Deliverables and mitigation activities which outline ongoing remediation efforts to improve and monitor performance improvements.

Success Measure:
- Monthly Contact Center Metric results will continue to reduce the "P" Factor percentage and eliminate the deficiency.
- Monthly use of 3rd party interpretation services will decrease because of bilingual CSR onboarding.

- Reduction/normalization of AHT will be observed across Access Dental Plan CSR team.

Access Dental Plan anticipates that with the aggressive hiring efforts of bi-lingual CSRs, along with the expected decrease in AHT through coaching and decreased usage of 3rd party interpretation services, continuous improvement will be seen with success in meeting the contractual P factor goal by early QTR 4 of 2023.

Ongoing oversight activities will continue along with regular review of staffing model assumptions.

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MDSD Approval:		Management Approval:	Adrianna Alcala-Beshara
MDSD Denied:	David Ferber		
Reviewed By:	Amber Pulley		

MDSD Comments:

Appendix A: Historical data reflecting increasing call volume, AHT, P Factor, staffing and attrition.

2022 Premier										
	Metrics			**Headcount**		**New Hire Recruitment**				
Month	**Calls Handled**	**AHT**	**ABN (P-Factor)**	**Actual FTE's**	**# of Bilingual Agents**	**# Recruited**	**# Started (English)**	**# Started (Bilingual)**		**Overall Attrition**
Jan	8,641	7:03	1.89%	16	7					
Feb	8,013	6:53	1.17%	16	7					**1
Mar	9,183	6:48	1:19%	15	6					
Apr	8,405	6:49	1.26%	15	6					1
May	8,492	6:53	2.23%	14	6					**1
June	8,740	6:51	2.65%	13	5					1
July	8,583	6:56	4.32%	12	5		3			**1
Aug	10,487	8:03	8.20%	14	4					**1
Sept	9,473	8:12	7.81%	13	3		2			
Oct	10,681	8:44	8.29%	15	3					1
Nov	12,033	9:12	22.37%	14	3		4	1		
Dec	11,811	9:52	24.39%	19	3					2
Total Headcount				**17**	**3**		**9**	**1**		**9**

**Bilingual Attrition- 4 Total
 - Feb = 1, May = 1, July = 1, Aug = 1 Total = 4

Headcount
 - January 2022- (16 Agents /7 Bilingual)
 - December 2022 (19 Agents / 3 Bilingual)

Call Volumes
 - Jan-Sept (8,891 Ave Per Month)
 - Oct-Dec   (11,508 Ave Per Month)   = 29.43% Increase

**2022 Forecast based off of historical call volume data. Significant changes in AHT and call volume did not begin to show a trend until Q4 2022. Support staff was utilized during peak call volumes.

	2023 Premier								
Month	**Metrics**			**Headcount**		**New Hire Recruitment**			
	Calls Handled	AHT	ABN (P-Factor)	Actual FTE's	# of Bilingual Agents	# Recruited	# Started (English)	# Started (Bilingual)	Overall Attrition
Jan	12,706	9:17	15.90%	17	3	6	4		3
Feb	13,042	9:32	23.45%	18	4	8	5	1	2
Mar	15,527	9:46	22.85%	22	4				
Apr	12,573	10:22	12.41%	22	4				**3
May	14,699	10:28	22.34%	19	3				
June	14,969	10:28	38.26%	19	3	10	3	3	3
July	12,776	9:59	28.43%	22	3				3
Aug	13,225	9:35	10.28%	19	3	14	2	8	2
Sept	10,790	8:46	2.46%	27	9				1
Oct									
Nov									
Dec									
Total Headcount				26	9				

**Bilingual Attrition:
  - April = 1, June = 3, July = 1, August = 2, Sept = 1 Total = 8

Headcount
- September 2023 - 27 Agents/9 Bilingual

Call Volume
- Jan-Sept (13,367 Ave Per Month)
* Will continue to monitor and adjust forecast accordingly

**The 2023 forecast was adjusted to reflect the consistent trend we saw in Q4 2022, which has been a continued trend in 2023. To address that trend and to ensure our success in meeting our contractual service level goals, additional headcount was added. As you can see by the data above, the added resouces have made a significant impact on our overall results.
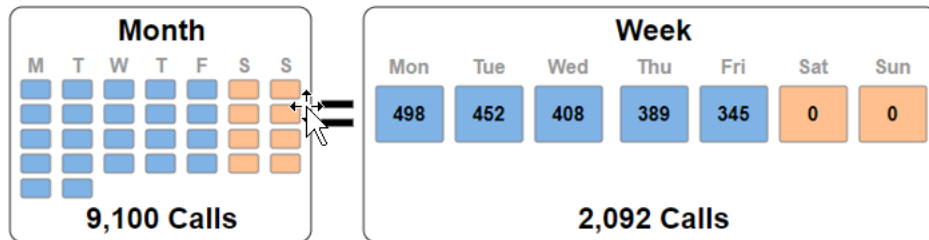
The added headcount also gave us the bandwidth to increase coaching sessions to focus on performance, call handling and productivity, which helped in reducing our average handle time by 49 seconds.

The addition of bilingual agents has not only reduced the need to utilize our translation services, but it has allowed us to provide a better overall experience for our members. Average handle time per agent is based on an aggregate of all calls received, including translator calls. Contact Center Software does not differentiate between AHT on translator calls vs. non-translator calls.

Appendix B: Erlang Forecasting Tool reflecting staffing impacts of changes in historical staffing model assumptions.

2022 Staffing requirements = 16 agents.
- Assumptions of AHT 6:55 minutes and 9100 calls per month

Month

M	T	W	T	F	S	S

9,100 Calls

Week

Mon	Tue	Wed	Thu	Fri	Sat	Sun
498	452	408	389	345	0	0

2,092 Calls

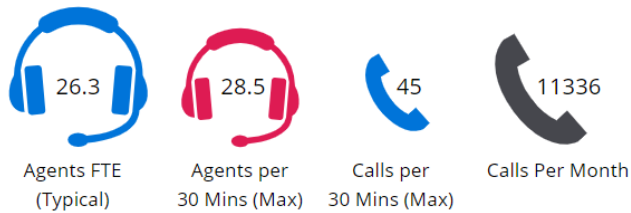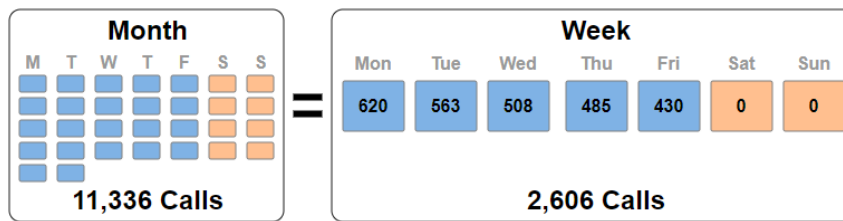| 15.9	17	36	9100
Agents FTE (Typical)	Agents per 30 Mins (Max)	Calls per 30 Mins (Max)	Calls Per Month

Assumptions: 9100 calls per Month - 80 % Answered in 30 seconds - Shrinkage 30 % - Max Occupancy 85 %. There are 37.5 working hours per week (=1 FTE)

Current Staffing requirements = 26 agents
- Revised assumptions of AHT of 10:23 and 11,336 calls per month

Month								Week						
M	T	W	T	F	S	S		Mon	Tue	Wed	Thu	Fri	Sat	Sun
								620	563	508	485	430	0	0
11,336 Calls							=	**2,606 Calls**						

26.3	28.5	45	11336
Agents FTE (Typical)	Agents per 30 Mins (Max)	Calls per 30 Mins (Max)	Calls Per Month

Assumptions: 11336 calls per Month - 80 % Answered in 30 seconds - Shrinkage 30 % - Max Occupancy 85 %.
There are 37.5 working hours per week (=1 FTE)

Appendix C: Calls volumes reflecting increase in utilization of 3rd party interpreter services to assist with Spanish calls in Q3 of 2022 and beyond.

2022:

Access_Linguistics
Report_2022_Q4.xlsx

2023:

Access_Linguistics   Q3 2023 Linguistic
Report_2023_Q1.xlsx Services Report 1.xlsx

**Note: Report template from state changed for Q2

Appendix D: Project plan for ongoing mitigation activities

	PROJECT WORKPLAN					
	MITIGATION ACTIVITIES					
Compliance Validation Activity	Activity Validation Tasks	Responsible Party	Resources Required	Contingency Plan	Timeline for Completion	Department Internal Controls (what will the department do to verify)
Daily Monitoring of SLA's	Meet with the leadership team daily to review MTD performance results to stay on track	Contact Center Manager (Diana Schneider) and leadership team	MTD Report		Daily	MTD Report
Staffing Needs	Review staffing needs to determine short term and long term gaps that need to be addressed	Contact Center Manager (Diana Schneider) and WFM team	MTD Report Staffing model Attendance Tracker	Cancel all off line activities Adjust overtime needs Utilize cross trained agents Skill support team members to assist with calls.	Daily	OT Reports MTD Report Genesys Report
Handle Time	Review MTD reports and monitor calls to determine opportunities for improvement.	Contact Center Manager (Diana Schneider)and leadership team	MTD Report Agent Performance Report Call Monitoring Software	Monitor calls and coach to behavior.	Monthly	MTD Report Agent Performance Report
Use of interpreter services	Run reports to determine usage of interpreter services compared to internal handling.	Diana Schneider	Language line report	Review workflow to confirm proper steps are being followed for internal and external assistance.	Weekly	Monitor calls
Monthly check in's with HR recruitment team to review staffing needs	Outlook calendar- Schedule monthly meetings.	Diana Schneider	N/A	Identify potential staffing gap and work with HR to begin recruitment efforts to stay ahead of attrition	Monthly	Outlook calendar Invites & job postings.

The mitigation activities have been effective to date, and we have successfully met all of our contractual goals for the month of September. With the increase in headcount, efficiency gains from the increased coaching plans and maintaining the mitigation activities listed above, we are confident in our ability to meet and exceed our goals going forward.