

Call Center FCR Best Practice Award Winner

**Gold Award for Career Advancement:
Sun Life Financial**

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Sun Life Financial

Company Description

We're Sun Life Assurance Company of Canada (Sun Life). We're a leading international financial services company who has remained steadfast in our commitment to listen to our customers and provide them with financial solutions to help meet their needs. We are proud to provide the utmost in customer service in a respectful, responsive and easy manner for our plan members. With innovative technology, a strong distribution network and long-standing relationships with some of Canada's largest employers and associations, we strive to deliver the best customer experience at every touch point, in every region across the country. We want our customers to achieve the peace of mind that comes with a lifetime of financial security. It's at the center of all we do.

Sun Life Financial Call Center Description

Locations

Waterloo
Montreal
Manila

Call Types

Group Benefit coverage/claims, Group Retirement financial products and Individual Life inquiries

Customer Types

Plan Members and their dependents
Health and Dental providers
Advisors
Individual policyholders

Headcount

546

Contact Channels

Phone, email, IVR and password protected website

Hours of Operation

Monday through Friday 8am to 8pm

Hours of Operation

On average 25,000 contacts per day including telephone and email inquiries

Opportunity

The passion and engagement from every Customer Care Representatives' interaction with our customers is inspiring. Employees decide to work for Sun Life with a desire to continuously learn, develop and grow within the company. They know Sun Life Financial has deep roots in Canada which go back nearly 150 years, with a strong service culture, innovative technology and long-standing relationships with some of the country's largest employers and associations – helping and servicing a client base consisting of millions of people across Canada.

Each and every interaction with our customers is an opportunity for our representatives to create a positive experience by empowering and guiding them through to a resolution of their issue(s)/inquiry. The wealth of information we receive through our SQM customer surveys, allows us to know hear what our clients really want and expect each time they call; a friendly yet professional approach, a personal touch, accurate information, and a finally a resolution. Knowing what our customers think and how they feel about us is the first step to offering World Class Service - Thanks to SQM, we have this information at our finger tips through the technology of the SQM portal.

With the use of the portal and the various trending reports available, we are able to coach our employees on the behaviors required to increase customer satisfaction. We value that our members take the time to provide feedback because it provides us with specific details that help us increase our employee's customer service skills. It is amazing the information that can be found on the portal that can help us focus on our customers' needs and improve the quality of our service. We can even gather information at the plan sponsor level and focus on specific client needs.

Best Practice

With the data provided by the SQM Portal in 2014, we implemented two new initiatives that addressed critical components of our business; offering customers a one-stop shop for quick and easy call resolution, and increasing our employee retention through a defined progression plan.

The Defined Progression Program (DPP) clearly outlines the training and development path for our CCRs which recognize their performance by progressing them to the next level of learning. It also rewards them through increased compensation at the successful completion of each

training milestone. The final journey in the progression path is our “Total Benefits” role, which is a one stop shop harmonized service for our joint Group Benefits and Group Retirement Services customers, and an actual promotion for our Total Benefits CCRs sitting at a higher job band level.

The selection process for the training progression eligibility is based on an overall review of key performance metrics, with Call Resolution and World Class calls being among the most critical criteria, measured through the SQM surveys and our Voice of the Customer (VOC) Program. Coaching is truly the key to our success; therefore, our coaching model is based on an individual coaching plan with heavy reference on the CCRs’ SQM survey results. This individualized coaching plan requires the CCR’s active participation using internal call calibration sessions in the creation of their “achievement plan”. This hands-on collaborative coaching approach has had a positive impact on our overall Customer Satisfaction results, as well as our overall employee engagement as they now feel like—empowered contributors of our Customers’ Satisfaction rating! Each individual also has a vested interest in progressing through our Defined Progression Program and the highly prestigious status of becoming a certified SQM World Class Call representative.

The selection process for the Total Benefits CCR role is especially selective as candidates must be meeting or exceeding on all metrics – with laser focus on the SQM World Class Call survey results. The successful Total Benefits candidates are viewed as “super agents” both among their peers, at the organization level, as well as by our external clients. This elite group includes exceptional individuals from our front line pool such as the 2013 SQM CCR of the year, Tara Gray.

FCR/Csat Outcome

We are confident that our new Defined Progression Program in conjunction with the higher level Total Benefits CCR role has allowed us to further increase our Voice of the Customer results, showing an overall increase of 3% in Call Centre Satisfaction, CCR Satisfaction as well as World Class Calls. Although this team is still in the early growing stages, we are already seeing 80.9% of the Total Benefits Team trending towards World Class Certification.

The combination of our Defined Progression Program and the more holistic Total Benefits Service Strategy allow us to offer a more balanced approach and experience in the building of a truly deserving World Class Customer Care Center status. This mix of ingredients results in a high quality of customer service offered by highly engaged employees that will also increase the retention of our most valuable asset; our Customer Care Representatives!