



Accuracy Matters

**GRYPHON**  
SALES INTELLIGENCE

Gryphon Networks

## **HEALTH INSURANCE** Case Study

How a Top 5 U.S. Health Insurer increased revenue and member retention at Open Enrollment as a result of implementing Gryphon's Sales Intelligence Platform.

GRYPHON SALES INTELLIGENCE

## INTRODUCTION



Dear Sales Leader,

In the past decade, companies have spent hundreds of billions of dollars on sales-related technology initiatives with a goal to drive efficiency, consolidate information, and simplify the sales process.

In spite of these efforts, less than 40% of forecasted deals end up closing, the average tenure of sales leaders is 18 months and dropping, and agents continue to spend too much time “checking boxes” rather than revenue-generating outreach to customers and prospects.

Technology was meant to be an enabler, not an obstacle to efficiency. Many of the tools that were deployed over the past several years have been designed to showcase complexity rather than minimize it. The best sales tools are “invisible” to the user and provide an automated, accurate service that performs valuable tasks without getting in the way of the rep’s workflow.

For almost 20 years, Gryphon technology has been in the path of hundreds of millions of sales and service calls from reps calling on behalf of many of the largest organizations worldwide. Our system captures phone-based activity from any device in real time and presents managers with a clear view of the daily behaviors that get the best results, and the ones that don’t.

When it comes to tools that are proven to drive sustained effectiveness for large, distributed sales teams, Gryphon knows what works because we have seen it work for our clients for more than a decade against the largest conceivable sample size.

Whether your team is operating from headquarters, branches, or working remotely or on the road, Gryphon’s patented technology transforms sales call activity into actionable intelligence, allowing leaders to make better decisions based on *actual numbers* and to manage their teams to a higher standard.

There is no better testimonial than learning directly from the company we keep. The following case study will illustrate specifically how Gryphon optimizes performance by closing the visibility gap between reps and revenue to improve coaching, increase customer retention, and drive growth for a known market leader.

But you don’t have to take my word for it. Read on and find out.

Eric Esfahanian  
Chief Revenue Officer

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**Our objective is to build ongoing relationships and to be seen by our members as informed, trusted advisors. That is the best way to ensure member loyalty.”**

-Sales Leader, Top 5 U.S. Health Insurer

## TOP 5 U.S. HEALTH INSURANCE CARRIER X GRYPHON NETWORKS

Learn how the Gryphon System enabled this top organization to surpass their team and revenue goals.

### 01 / THE SITUATION

#### Thousands of Customers with Unique Preferences Make 1:1 Marketing Complicated

With more than 3,400 field sales personnel across all 50 states, a Top 5 U.S. health insurance carrier faced the unique challenge of maintaining contact with hundreds of thousands of customers on a regular basis – all while observing each individual's unique contact preferences.

#### Mobility Meets Accountability

Account managers serve as the company's lifeline to its members. Customer interaction is the most important part of their jobs, and the health insurer was looking for ways to help team members be more effective in supporting customers.

Furthermore, these highly mobile account managers needed a reliable way to both communicate with their clients and plan their day around maximizing customer visits.



## 02 / THE TASK

### Centralize Visibility for Distributed Account Managers, Increase Loyalty & Drive Referrals

“We don’t push products,” said one of the Company’s sales leaders. “Our member outreach strategy is to inform and assist members to make the right enrollment decisions. Our objective is to build ongoing relationships and to be seen by our members as informed, trusted advisors. That is the best way to ensure member loyalty.”

In addition to member retention, the insurer was focused on increasing the number of new client referrals from satisfied members.

“New member acquisition is very costly, so we have found the best way to grow our member base is by exceeding the expectations of our current members, who are then usually happy to introduce others to our services with which they are highly satisfied.”

#### Adopting a Solution

With these goals established, the carrier set out to identify a technology solution that would help them track customer



activity from their agents’ mobile phones while remaining compliant with members’ contact preferences – as well as a sophisticated set of marketing and business rules.

Most importantly, the organization required a system that was fully integrated with their reps’ existing calling processes. Also, to ensure adequate utilization levels, the solution had to be simple and flexible enough to not get in the way of reps’ efforts to cover a large member territory while delivering both a high level of service and enhanced productivity.

## 03 / THE APPROACH

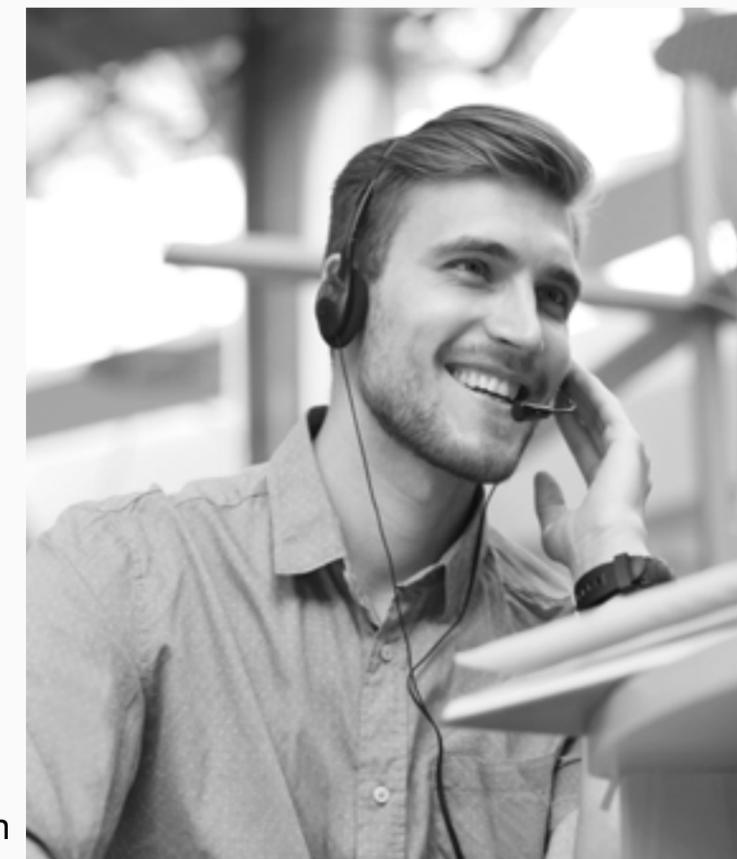
### Drive Outreach, Improve Visibility and Keep Agents Productive

All these factors and objectives considered, the health insurer initiated a pilot of Gryphon’s Sales Intelligence Platform - a cloud-based, advanced telephony system that automatically captures and processes phone-based activity in real-time from agents using any type of phone, anywhere.

#### Optimizing Outreach

Specifically, the company hoped to gain visibility into the call activity of account managers to ensure that they were doing everything possible to reach out to members before Open Enrollment season.

They also wanted to test whether scheduling and executing managed touch-points at regular intervals with members before the start of open enrollment would help build the one-to-one relationships leading to better loyalty, reduced member churn, and corresponding significant cost savings.



## Implementing the Gryphon System

With most agents relying on smartphones to conduct business, the Insurer worked with Gryphon to deploy a fully-mobile, sales activity capturing and tracking solution.



The platform automatically certified dialed telephone numbers for compliance with a company-specific rules engine and each member's individual communication preference. Gryphon Universal Access mobile app was enabled on every account manager's company-issued iPhone via which they made their daily outreach calls to members.

Because agents were often leaving voicemails to members that prompted a call-back, the Gryphon solution was configured to track inbound as well as all outbound calls from members.

### The Metrics that Matter

Finally, in order to capture the most relevant context related to each customer conversation, Gryphon enabled account managers to quickly "tag" a call with a pre-defined outcome using a simple keypad sequence at the end of each call. As a result, call results like "set appointment" or "call back later" could be captured via the phone immediately after a call concluded, instead of manually via CRM.

This automation greatly increased activity capture and the relevance of the reported data for management analysis.

## 04 / THE RESULTS

### More Revenue, Better Retention and a Culture of Continuous Improvement

With success criteria well-defined, account managers proceeded with a pilot of the Gryphon system. Over one million calls were placed to 600,000 members in nine months.

The outreach program with Gryphon, when compared against a control group across several key categories, resulted in a 4% improvement in retention of team members and \$5.6M in additional revenue. When extrapolated to the entire membership population, the revenue growth was estimated to be \$30M annually.

### Driving Performance

This health insurance leader's collaboration with Gryphon resulted in a reliable and seamless solution that successfully captured all related details for every call, inbound and outbound, and made information available to both managers and agents.

This solution drove better performance, higher quality service, and training improvements that dramatically altered the way the Client thought about customer outreach via the telephone.





## Agent Improvement

Account managers were empowered to make the most of their time in the field and became better able to accurately report their activity - without jumping through unnecessary hoops or wasting valuable selling and service time.

More importantly, the Client improved customer service levels and retention with increased loyalty, which resulted in many new client referrals.

If you can't capture it, and you can't measure it, you can't manage or improve it. With Gryphon, health insurance firms can leverage actionable insights to establish and refine daily selling behaviors and best practices that get results - all while

preserving agent flexibility to create a culture of accountability, efficiency, productivity, visibility and continuous improvement.

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**Gryphon's cloud-based technology automatically collects and analyzes call data from any device to transform sales call activity into actionable sales intelligence, delivering significant return-on-investment from customer communications and outreach.**

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