

## Customer Profile

Aetna Medicare Transition Services helps people transition from employer group coverage to individual Medicare plans as they become eligible for Medicare, whether they are going to retire or not.

## NICE inContact Solutions

- CXone Omnichannel Routing
- CXone Personal Connection
- CXone Audio Recording
- CXone Screen Recording
- CXone APIs

## Results Achieved

- Reduced costs
- Decreased call handle times
- Improved customer service
- Boosted scalability
- Increased advisor workforce by 181 percent in six weeks

## On NICE inContact

“CXone has the functionality we needed, and NICE inContact has the depth of experience we wanted. It’s not surprising that so many large contact centers choose them.”

Bill Jetter  
President  
Aetna Medicare Transition Services

# Aetna Medicare Transition Services Takes Control of its Contact Center with CXone

## About the Company

It’s not surprising that many employees are confused about their healthcare insurance options as they become eligible for Medicare. Aetna Medicare Transition Services educates working people ages 65 and older on healthcare options and helps them determine if Medicare is right for them and then can help find a plan that meets their needs. The organization focuses primarily on transitioning employees from their employers’ group Aetna plans to individual Medicare plans with Aetna.

The company has 45 agents, all of whom are licensed insurance agents, at its Florida contact center. These advisors handle around 2,700 calls per month, the majority of which are inbound calls generated by marketing campaigns to corporations that have asked Aetna MTS to educate their employees on healthcare options for retirement. Call volumes increase dramatically during the annual Medicare open enrollment period from October 15 to December 7.

## The Challenge

Before CXone, Aetna MTS used an on-premises system that was managed by a vendor specializing in contact center services for the insurance industry. The vendor also leased office space and advisors to the organization.

Because of this arrangement, the company was unable to make system updates or perform customizations. “A basic system change would take the vendor 30 to 60 days, if they did it at all,” says Bill Jetter, President, Aetna Medicare Transition Services.

The vendor-managed system also had limited functionality. For example, advisors didn’t have callers’ information before taking calls and, as a result, call handle times were long and customer service suffered. The system also couldn’t route calls by priority or integrate with third-party solutions.

The on-premises system also limited the company’s scalability. Bill envisioned a future where advisors could work from home and he could offer additional communication channels, but the vendor’s system couldn’t support those options.

## The Solution

Given these ongoing challenges, Bill started looking for a cloud solution, and NICE inContact CXone rose to the top of his list. “I saw a demo, and it had all the functionality we wanted, from scripting and reporting to a user-friendly environment. We could also integrate CXone with preferred third-party solutions like SpiceCRM,” he says.

Before making a final decision, Bill reached out to others in the industry. “I called some of my colleagues at large contact centers,” he says “They confirmed they were using NICE inContact and had good things to say about it. Those endorsements carried a lot of weight.”

## Opportunities Identified

### Greater Control Over System Changes and Costs

Having moved to the cloud and CXone, Aetna MTS no longer had to rely on a vendor to make system changes. “Today, we can make updates ourselves and in the time frame that works for us,” Bill says. “Our prior vendor controlled the system completely, which negatively impacted our business.”

Taking direct control of the system also gave the company greater control over costs. “Instead of paying an hourly leasing fee to the vendor, we now have more discretion over our spending,” Bill says “As a result, we’ve experienced significant cost savings.”

### Improved Functionality for Streamlined Workflow

In addition to cost savings, implementing CXone also gave Aetna MTS new contact center functionality, including the ability to customize interactions for different types of calls with teleprompter scripts and whispers.

Bill explains: “We have two main types of inbound calls generated by different marketing campaigns. The information the advisors need to ask callers is very similar but in a different order, depending if the call is about Aetna or multi-carrier coverage options. The ability to customize the script based on the call has given us a lot of flexibility and consistency at the same time.”

Not all inbound calls are of equal priority so the company uses skills-based routing to ensure that high-priority calls are handled first. “Skills-based routing helps us keep our commitments to employers when call volumes are high,” says Bill.

Aetna MTS is also using CXone APIs to integrate with third-party systems, including SpiceCRM and Tableau, a third-party reporting tool. “CXone gives us a lot of flexibility to customize the platform to our requirements,” Bill says. “It definitely offers more modernization and agility than we had with the previous system.”

“With the old system, we had limited reporting and we operated by the seat of our pants,” he continues “With these integrations, we can now view our overall performance and individual agents’ metrics such as number of calls, conversion rate and handle time.”

Bill and his team use this data for teaching and coaching. “If a call lasts more than five minutes, for example, we work with that agent to reduce handle time,” he says.

“We’ve experienced a positive return and significant cost savings after switching to NICE inContact.”

Bill Jetter, President, Aetna Medicare Transition Services

### Scalability for Future Growth

CXone has also enabled Aetna MTS to easily scale its workforce as the company grows. “We increased hiring by 181 percent in just six weeks, growing our staff from 16 to 45 advisors,” says Bill. “In the future, we want to offer advisors the option of working from home. Since CXone is a cloud platform, we have the option to implement that whenever we’re ready.”

“We’re not currently using chat or email, but I definitely see us implementing those in the future,” he says. “It’s nice to have that option without needing to revamp our entire system. With CXone, we can easily add that functionality.”

### Call Recording for Agent Feedback and Training

Aetna MTS also uses CXone Call Recording to assess call quality: Call recordings are used for agent feedback and to confirm they’re complying with industry regulations. “We listen to a percentage of every agent’s calls to evaluate how they’re doing,” Bill explains. “If we’re not satisfied with what we hear, we use it as an opportunity for coaching and training.”

### The Right Choice

Bill is happy he chose NICE inContact. “CXone has been great for us,” he says. “We now have a flexible, cost-effective solution that’s made a positive financial impact on our business. The fact that many large contact centers also use CXone gave me great confidence in selecting it for our business. If we had to go back and do it all over again, I would definitely choose NICE inContact.”

## About NICE inContact

NICE inContact is the cloud contact center software leader, empowering organizations to provide exceptional customer experiences with the world’s #1 cloud customer experience platform, NICE inContact CXone™. CXone combines best-in-class Omnichannel Routing, Workforce Optimization, Analytics, Automation and Artificial Intelligence on an Open Cloud Foundation to help companies act smarter and respond faster to consumer expectations. NICE inContact, a NICE company, is recognized as a market leader by the leading industry analyst firms, and serves customers in more than 150 countries, including over 85 of the Fortune 100 companies.