Super Users Saved the Day – But Should They?

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Introductions

- Working Customer Relationship Management program and technology strategy for 13 years
- Deep knowledge of the sales, marketing and service verticals.
- BS in Communication Sciences and Disorders from Northwestern University
- MBA in Business Management
Introductions

Mark Morman
Senior Consumer Experience Professional
Humana Customer Service Innovation

• Working Customer Relationship Management program and technology strategy for 12 years
• Deep knowledge of the data, process, communications, and training programs
• BS and MA in Communications from U of Dayton
• Lean Six Sigma Black Belt
Fortune 100 Company

Health Insurance and Related Products

Headquarters in Louisville, KY

16 Million Medical Members

FTSE4Good
Service Evolution

Customer Service required up to 16 different applications to get the job done!

- Limited View of Consumer
- Lost Visibility Between Transfers
- Disconnected Summary
- Information Spread over Many Applications
- Manual & Intensive Searching
- Reliance on Agent to seek out information
The Teams

The Design Team
- **Stakeholder**: Oversite and Key Decision Making for Program
- **Delegate**: Day to Day Management of the Operational Project Components
- **SME**: Business Process Expertise for Requirement Development. Confirmed the Design

The Delivery Team
- **Manager**: Performance management. Responsible for SLA’s and achieving operational goals
- **Supervisor**: Provides day to day direction to Associates. Uses a flexible approach to put out fires
- **Super User**: Technically proficient associates capable of taking on a leadership role
Super Users - Driving Implementation Toward Success

- Involve
- Energize
- Communicate
- Drive
- Support
- Test
Communication Methods

- Emails
- Posters
- Articles
- Lunch and Learns
- Website
- Online Discussion Board

“CRM is going to help with both the member and provider experience.”

“It’s clean, everything is easy to find.”
Command Center

• On hand resources to provide desk-side support to our associates.

• Troubleshoot reported issues to determine if issue was technology, training or process issue.

• Communicated with IT on verified technology issues.
Super Users Saved the Day!
Common Challenges to CRM Success

- Lack of Change Management
- Lack of Executive Leadership
- Quick-Win Mentality
- No Clear Strategy
- Lack of Measurable Goals
- Insufficient Data Model
- Approaching CRM as a Technology-Only Solution
- Inadequate User Buy-In
Adoption Issues Prevailed

- Not using the system as designed
- Using familiar applications outside the system (Notepad, Work, Outlook etc.)
- Reverting back to legacy systems or logging directly into integrated applications.
Welcome to Bright Island

CRM Service Knowledge & Skill Building Program

Supervisor Led Coaching

Tools & Resources

Super User Support

Targeted Reporting
Pilot Results

• “Educational & Eye Opening”
• Coaching allowed supervisors to “get into the trenches”
• Unknown Incorrect Behavior Identified
• Peer & Super User Support Leveraged

51% ↓ Reduction in Interactions without Cases Error

91% ↓ Reduction in Cases without Comments Error
Some things **CHANGE**...Some do not

**Kotter 8 Step Change Model**

- **CREATE** a sense of urgency
- **INSTITUTE** change
- **SUSTAIN** acceleration
- **GENERATE** short-term wins
- **BUILD** a guiding coalition
- **FORM** a strategic vision and initiatives
- **ENLIST** a volunteer army
- **ENABLE** action by removing barriers
Evolution to Customer Focus
Customer Centric Culture

• One CRM Strategy

• Senior Leadership Communication & Engagement

• Clearly Demonstrate the Value
Engage Associates

• Share Success & Examine Failure
• Reward & Recognize
• Develop Strong Leaders
Treating Different Customers Differently

• Design an experience for each customer based on knowledge of that customer

• Deliver that experience across all channels

• Measure outcomes that inform an adapted customer experience for future interactions
Teamwork!

What’s going to work?

Gartner Research
Publication Date: 4 April 2006
ID Number: G00138658

Super User Role Is Key to Post-Implementation Support of ERP Systems
Pat Phelan

Super users are key components of the ERP support infrastructure. In addition to being on the front line with end users, they also serve as liaisons between business and IT organizations, enabling IT organizations to focus on more-technical aspects of system support.

https://www.slideshare.net/harbounp/superuserroleiskeytopostimplementation
Questions?