



# Our Customers Speak for Our Solutions

## *An OAISYS Case Study*



### **Employee Benefit Risk Management Services** **Oak Brook, Illinois**

Employee Benefit Risk Management Services (EBRM®) Inc., located in Oak Brook, IL, was founded in 1976 and is licensed as a general agent in 49 states. As a general agent, EBRM provides administrative services to insurance agents. This includes activities such as preparing quotes, ensuring cases are completed correctly prior to carrier submission and handling service issues between agents and carriers.

More than 4,000 agents with policies totaling more than \$300 million in premiums work with EBRM. The company's 54-member staff includes in-house underwriters and highly trained customer service representatives versed in medical terminology and specifics of carriers' policies.

Ever-shifting regulations, emerging products and a language all its own make health insurance the most complex business line handled by many industry producers. The expertise that EBRM provides has led it to become the largest general agent for Blue Cross Blue Shield in Illinois in addition to supporting Humana, UniCare and other leading carriers.

"An agent's job is to go out and sell," said Renee Seguin, EBRM's Customer Service Manager. "They use us to take care of carrier issues. If there is a billing issue with a group, they call us, tell us what the problem is, we'll investigate it and let the agent know what's going on."

Several years ago, when the company needed to streamline and optimize its business communication processes, they turned to OAISYS Silver Reseller Advanced Telecommunications of Illinois (ATI) for help.

ATI assessed EBRM's communications needs and recommended Tracer, the professional interaction management solution from OAISYS, to help the company improve their sales, marketing, customer service and support activities.

Tracer empowers organizations to unlock the full potential of their business communications. Tracer records phone-based interactions between businesses and their customers as well as related desktop activity through optional screen recording capabilities. Contact centers utilize these recordings to manage their agents, company processes, quality of service and customer expectations.

"On average, we receive around 400 phone calls a day. We probably make 1,400 outbound calls a day," Seguin said. "We installed Tracer to record all of our phone calls. It was installed for training purposes, whether for phone reps or marketing reps or other employees.

The firm is heavily engaged in marketing to and recruiting new agents, and they have found the Tracer solution to be invaluable for making those efforts more productive.

"On the marketing side, it's great for training. You can say, 'Here's how you presented this product, and here's a better way to do it.' That's what it was installed for, but it's definitely saved us [in resolving disputes] a few times, too."

To support their commitment to quality and training, EBRM audits phone calls for each of its units. "We pull a few calls from each person from both the inbound and outbound phone units. We can play it back for them and use that as an example. We can say, 'Everybody, listen to this one. Here's how you should answer the calls.'"

Having been employed with EBRM before Tracer was introduced and in the years since, Seguin has seen first hand how the solution has improved their business operations. The ability to reference recordings of their phone interactions has eliminated any ambiguity and uncertainty that existed prior to the deployment. "Now, you have an actual conversation people can listen to.



[Previously] it was, 'Well, if they say this, then you can say that.' Now they can actually listen."

Seguin has nothing but positive things to say about the support she has received from ATI and OAISYS. "[Our rep at ATI] is really great. He's very knowledgeable and very attentive. If you've got a question you can call him, and if he doesn't know, he's happy to check."

An upgrade to a later release of the Tracer solution provided EBRM with enhanced feature functionality, introducing many new and improved benefits to their business operations. Tracer and its inherent Portable Voice Document (PVD™) technology provides EBRM with a safe and secure means of reviewing, sharing and adding text-based annotations to their voice documents, or call recordings. The ability to add notes to recordings was a feature that had Seguin particularly excited.

"This is a really cool feature," she said. "If you want to pull a call and say, 'This customer is upset,' we can add an annotation mentioning that. What also is nice is you can dissect a call now. You can say, 'This part of the call isn't so good.'" We're excited about being able to attach the audit sheet."

Tracer's enhanced search functionality is another benefit Seguin appreciates. Tracer utilizes a Microsoft Outlook®-style interface, which makes organizing and searching for calls simple and efficient—a desired recording can be retrieved within just seconds. Users can add and maintain folders for parties with frequent interactions. Calls to and from regular or important callers can be stored in a common folder for easy reference and lookup.

Businesses choosing Tracer for their call recording needs also receive an unlimited user license for the award-winning OAISYS Talkument® voice documentation and collaboration software. Talkument enables workers throughout the entire organization to search, play back, annotate and share their phone-based interactions. Seguin knew that unique advantage of the OAISYS system would prove very beneficial for EBRM once it was implemented throughout her company.

"Right now, my director and I are listening to the phone calls of 21 different employees," Seguin said. "That's very difficult to audit. It's going to be nice because our intent is to provide this capability to the supervisors to allow them to audit their staff. We'll be able to perform more audits simply because there will be more of us attached to this task. We'll really be able to stay on top of it."

One of the key differentiators between OAISYS and other solution providers is an unwavering commitment to support and training, and Seguin had nothing but positive remarks about her experience with the OAISYS product trainer. "He was wonderful. He taught us a lot just by staying with us on the phone for an additional hour even after our scheduled training time had concluded."



OAISYS also provides extensive web-based documentation and training free of charge, including presentations and videos, and Seguin has been taking full advantage of those materials. "I've been going online and listening to training sessions. Whenever I have a chance I go back and listen [to them]."

Seguin looked forward to EBRM further leveraging the many additional benefits of the Tracer solution. "It's going to be fun. To be able to add annotations and dissect the calls, that's going to be interesting. We're excited about that."



To find out more about OAISYS, Tracer and Talkument, please visit our website at [www.oaisys.com](http://www.oaisys.com).

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