



Case Study: U.S. Office of Personnel Management, Retirement Information Office

The U.S. Office of Personnel Management Achieves Quality Assurance Goals with Call Center Support from Active Network, Government

Background

The Retirement Information Office (RIO) of the U.S. Office of Personnel Management (OPM) provides information and support to federal retirees (annuitants) and their families through government-operated call center operations in three geographic locations. With the number of retirees far exceeding the number of customer service representatives, OPM was challenged to deliver the required level of service and subsequently decided to outsource overflow services.

Challenge

Using 120 customer service representatives (CSRs), OPM attempted to handle inquiries from a base of 2.4 million retirees but were unable to render the level of service they chose to provide. During open season and after any mailings or other announcements affecting their constituents, callers experienced longer than desired waiting periods. OPM determined that outsourcing overflow services would help minimize callers' time in queue and improve their quality of service.

Solution

Active Network, Government was selected through a bid process to operate a call center to handle overflow calls from federal annuitants and their families. Active was selected as OPM's partner due to its call center experience in handling the concerns and requests of federal employees and constituents. For 10 years, Active managed diverse and complex federal government inquiries for the GSA's Federal Information Center (FIC) and other agencies. Part of the FIC experience was directly related to OPM, namely handling death claims and making meaningful referrals to OPM offices.

Technology

All data is resident on OPM's system. Originally, Active connected into the OPM database by secure VPN connection. Later, project employees used CITRIX to connect to 13 OPM mainframe databases. A desktop technician provides dedicated support to the project and ensures the integrity of the secure connectivity.

Call Center Staffing

Active initially deployed 16 CSRs to launch the OPM overflow call center. As with all Federal engagements, security was a critical concern given the confidential nature of the information being handled. Each CSR was required to undergo

Customer at a Glance

Customer: U.S. Office of Personnel Management, Retirement Information Office

Solution: Managed Services

URL: www.opm.gov

Project Highlights:

- ▶ Providing overflow services to OPM since 2002
- ▶ Fielding more than 2.1 million calls and 30,000+ monthly average
- ▶ Set up information hotlines in short periods of time during Hurricane Katrina

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Commendation from Call Center Customer:

“I am writing this Letter of Appreciation to express my gratitude for giving me the assistance that I needed to resolve my problem... You immediately responded with knowledge, skill and experience.”

- Miguel C., El Paso, Texas

a rigorous security clearance, background check, and financial investigation prior to serving on the contract. After the service was underway, call volume increased significantly as a result of OPM's annual open season, a mailing of 1099R tax statements, and two mailings to federal retirees concerning a cost of living adjustment and an adjustment in life insurance premiums. Active correspondingly increased the CSR staffing levels. Nearly all of the CSRs employed to the OPM project had previous Federal contact center experience and possessed the discretion, skills, and knowledge demanded by the complex and privileged nature of the customer interaction on the OPM project.

People and Training

OPM originally conducted five weeks of initial training onsite at Active with five agency trainers who covered every aspect of the government's retirement and insurance services. This included mastery of every topic annuitants and families might inquire about, guidance on how to handle calls of every nature, specific instructions on what the CSRs were to say, and extensive role playing to simulate actual calls.

As a quality assurance measure, Active provided Click2Coach, a robust call monitoring application, to enable OPM representatives to remotely monitor recorded calls. OPM regularly monitors one percent of all annuitant calls.

Active also conducts ongoing weekly training on program changes and new information on mailings sent by OPM to its annuitants and families.

Results

Since December 2001, Active has taken over 2.1 million calls from current and former federal employees, federal annuitants and their families/survivors, as well as calls from federal, state and local government agencies. The average monthly call volume of over 30,000 is handled by more than 30 highly trained customer service representatives.

Tier 1 and Tier 2 CSR's:

- ▶ Handle requests for forms, information, and pamphlets, with OPM providing fulfillment services.
- ▶ Make changes to the annuity for tax, address, direct deposit/payment, health insurance, and perform death drops.
- ▶ Transfer calls to OPM case specialists and OPM agency branches.
- ▶ Handle fax requests including PIN number requests, verification of life insurance, and verification of annuity, FOIA, Y-Adjustment, and health benefits changes.
- ▶ Handle more complex calls outside of basic annuity changes.
- ▶ More experienced subject matter experts make out-bound calls contacting insurance carriers to verify coverage, enroll annuitants, request emergency medical attention approvals when necessary and handle other calls of special circumstance.