

Health Advocate  
**2011**  
Global Winner  
Optimas Award  
for Service



## 2011 WINNER: SERVICE Health Advocate Inc.

The Boy Scout motto "Be Prepared" could apply just as well to Health Advocate Inc., which helps employers and their employees in their dealings with the health care and insurance systems.

A key service provided by the Philadelphia-area firm is telephone assistance to clients' employees during health insurance open-enrollment periods, which typically take place in fall or winter. **During the 2009 open enrollment, Health Advocate saw call volume soar by 60 percent from September to October, compared with increases of 30 to 40 percent in previous years. The influx in calls in 2009 translated into an upsurge of more than 250 calls per day.**

Health Advocate learned "history is not always a good predictor," says Tara Kelly, senior vice president of operations at the Plymouth Meeting, Pennsylvania, company. A company might make minor changes to its health plan one year and major changes the next, she says.

After coping with the onslaught of calls in 2009, Health Advocate decided to ramp up early for 2010. Preparations for a possible boom started in June, Kelly says.

The company hired about 40 seasonal workers to augment its staff of almost 400, and Kelly says Health Advocate wanted all the new hires to be prepared by September "so on the first day [of open enrollment] they aren't drowning."

New hires went through an intensive three or four weeks of training, with the goal of "trying to assimilate them as gently as we can," Kelly says.

### The hiring and training initiative included things such as:

- Asking every account manager whether their clients expected major health plan changes.
- Hiring extra new seasonal employees in case some of the original hires couldn't cope with the call volume.
- Assigning mentors to answer the questions of new hires once they started handling calls.

**It turns out 2010 brought another surge in calls—with volumes up 50 percent in October compared with September.** That wasn't a problem thanks to all the preparations. One of Health Advocate's key objectives is to have its employees answer client calls within 30 seconds. With the new program in place, calls were answered on average within 25 seconds even during the heart of open enrollment.

For its success in keeping up with the call volume crunch during open enrollment, Health Advocate is the 2011 winner of the Optimas Award for Service.

### ADDITIONAL 2011 WINNERS:

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Dallas, Texas

#### Corporate Citizenship

Infosys BPO,  
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Canada

#### Financial Impact

NetApp  
Sunnyvale, California

#### Global Outlook

IBM Corp., Armonk,  
New York

#### Innovation

Sodexo Inc.,  
Gaithersburg, Maryland

#### Managing Change

City of Peoria, Arizona

#### Partnership

U.S. Navy

#### Vision

Disability Group Inc.,  
Los Angeles