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# New York Life

inContact ECHO is the Right Solution to Enhance New York Life’s Quality Management Program and Make the Customer Experience More Valuable.

New York Life Insurance Company has a 175-seat call center handling inbound telemarketing, customer service, fulfillment and inquiry calls for its 1.7 million customers across the United States.

## The Challenge

In 2006 New York Life was looking to add a complimentary tool to their existing quality management program to help capture direct customer feedback from a larger group of callers. “We couldn’t get the feedback frequent enough and we couldn’t link it back to track actionable change. We needed to add another tool to help us tell the whole story,” said Lynn O’Neill, Assistant VP.

## The Solution

New York Life needed a solution that was automated and invisible to the agent. They were also looking for a tool with robust reporting capabilities, ease of use, and the ability to be turned on and off. Seven vendors were evaluated and the choice was narrowed down to three.

inContact ECHO (Every Customer Has Opinions) delivers a customer service survey immediately following a contact to capture feedback regarding the experience. These results are made directly available to the agent and managers empowering modification in service levels in near real-time.

The company involved people from the systems department, technology specialists and the contact center VP to help make the final decision. “ECHO was chosen due to price, how easy it was to use, and because of how it met our overall implementation needs,” commented O’Neill. “Initially our IT department wasn’t convinced, but after the project was deployed, we made a believer out of them.”

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### Overall ROI of inContact ECHO

“inContact ECHO was very easy to deploy and integrate with our existing technology. After implementation, we started receiving reports the following day,” stated O’Neill. ECHO has helped the company capture customer feedback on an ongoing basis and track satisfaction directly to their agents.

In fact, these results have become 20% of an agent’s overall performance review. “By incentivizing this program, agents are more motivated to develop their skill levels while having the added benefit of knowing they will be rewarded for good customer responses,” noted O’Neill. It is also an added benefit that the feedback comes directly from the customer.

Callers who participate in the survey are asked questions regarding their call routing experience, how helpful, courteous and knowledgeable the agent was and their overall satisfaction. On average, 63 percent elect to participate in the survey and 23 percent complete the survey. Of those who participate, 96 to 97 percent state they are satisfied with the time it took to reach an agent and how the call was handled; while

less than one-half of one percent say they are dissatisfied.

“ECHO is giving us a better view into our customer demographic and their needs, often our customers are simply looking for confirmation or verification on a payment. Currently, 83 percent of our customers state that the first call resolved their issue. We are continuing to look for ways to increase this percentage,” remarked O’Neill.

Because the ECHO solution has helped identify drivers behind Key Performance Indicators (KPIs) and first call resolution, the company has experienced some actionable results. Since deployment, New York Life has improved their first call resolution by one percentage point of the annual volume and is focusing on moving more of their contacts to the “top box” level.

Additionally, inContact ECHO has given the company actionable feedback to improve process and procedures. According to O’Neill, “This technology solution has given us the ability to drill down into the key drivers of dissatisfaction and implement recovery opportunities for customers that give a low score.” New York Life has a quality analyst

team that evaluates the triggers behind the low score and executes service recovery as appropriate. “We can now better understand customer expectations and really drill down into making the customer experience more valuable,” said O’Neill.

### About New York Life

New York Life Insurance Company, a Fortune 100 company founded in 1845, is the largest mutual life insurance company in the United States and one of the largest life insurers in the world. New York Life has the highest possible financial strength ratings from all four of the major credit rating agencies. Headquartered in New York City, New York Life’s family of companies offers life insurance, retirement income, investments and long-term care insurance. New York Life Investment Management LLC provides institutional asset management and retirement plan services. Other New York Life affiliates provide an array of securities products and services, as well as institutional and retail mutual funds. To learn more about New York Life, visit [www.newyorklife.com](http://www.newyorklife.com).



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