

Healthcare benefits



How a Healthcare Benefits Company Built a Workforce Strategy for 7x Growth

A WFM Navigator case study from Solid Rock Consulting

3 → 21

Accounts supported, before SRC and today

7x

Growth achieved, without overspending or losing the customer experience

10/10

"Would recommend", Head of Customer Care

01 | AT A GLANCE

CLIENT

A fast-growing healthcare benefits company running customer support through BPO partners

THE GOAL

Grow from 3 accounts to 21 without overspending or losing the customer experience

STARTING POINT

3 accounts, 99–100% service level, single-digit occupancy

ENGAGEMENT

Workforce strategy and WFM Navigator: ramp planning, a BPO champion/challenger model, and an internal WFM discipline

02 | THE CHALLENGE

As a young company determined to exceed customer expectations, the company relied entirely on its BPO partner to handle workforce management. The results looked great on the surface: a 99–100% service level across its three accounts.

But that service level came at a high price. The operation was heavily overstaffed, with occupancy in single digits. Most of the time, agents were waiting for contacts rather than handling them.

With three accounts, the company could absorb the cost. But the company was set to grow to **21 accounts**, and leaders knew that over-performing on every account wasn't sustainable at that scale. They needed a workforce strategy that would:



Keep the customer experience strong as volume grew



Staff to the right level, not the maximum



Hold BPO partners accountable for performance



Give the company its own control over workforce planning, instead of depending entirely on its BPO

03 | WHAT WE DID

SRC built a workforce strategy that supported both the client's growth plans and its customer experience goals, focused on three areas.

01 Ramp-up and ramp-down planning

Every new account launch, and every seasonal swing, now has a staffing plan behind it. SRC forecasts the demand each account will bring and plans hiring, training and staffing levels to match, so the client adds people when volume arrives rather than months ahead of it, and scales back when demand drops.

02 A BPO champion/challenger model and scorecard

Instead of relying on a single BPO, the client now runs its partners against each other. The best-performing partner (the champion) earns more volume, while challengers compete to take it. A clear scorecard measures every partner on the same metrics, so volume decisions are based on performance, not habit.

03 An internal WFM discipline

SRC built the client its own workforce management function, so planning decisions sit with the client rather than its BPOs. Through WFM Navigator, SRC's team delivers:

- WFM processes for Customer Care, built from the ground up
- A Command Center that gives the client one central source of truth while it works day to day with its vendors
- Standard operating procedures, kept up to date and shared so everyone stays aligned
- Long-range capacity plans and short-range forecasts for each account
- Weekly intraday plans showing staffing needs by time of day
- Daily performance reporting on service level, handle time, abandon rate, occupancy and adherence
- Planning across English and Spanish queues and multiple workforce partners

04 | THE RESULTS

	BEFORE SRC	TODAY
Accounts supported	3	21
Occupancy	Single digits	Highest occupancy goals achieved
Service level	99–100%, driven by overstaffing	Service level goals met at the right staffing level
BPO management	One partner, no scorecard	Champion/challenger model with a shared scorecard
Workforce planning	Owned entirely by the BPO	The client's own WFM function, run with SRC's Command Center

The client now staffs to demand instead of to the maximum. It brings on new accounts with a plan, holds its BPO partners to clear standards, and owns its workforce decisions.



Sign the contract. It's worth every dime and then some! ... We achieved our highest occupancy goals while meeting SL goals too. When a WFM issue arose, SRC was there to assist, and I breathed a sigh of relief knowing that. If you're on the fence about doing business with SRC, don't be. 10/10 would recommend.

Head of Customer Care, fast-growing healthcare benefits company

05 | WHAT'S NEXT

SRC continues to plan the client's workforce as it adds new accounts and workforce partners, keeping staffing matched to demand as the business grows.

Growing fast, or paying for more staff than you need?

If your service level looks great but your costs don't, or you're scaling faster than your planning can keep up, WFM Navigator gives you an expert workforce team that grows with you. Start with a free Data 100 assessment and see where your workforce planning stands.

navigator.thewfmpeople.com