



Deft Research provides focused, applicable information to health product and marketing teams for more confident and productive project implementations.

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## CASE STUDY: CUSTOMER RETENTION

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### The Challenge

The health plan client had seen phenomenal growth during the past year, but it was followed by rate of disenrollment that management thought was unacceptably high. They had their suspicions about disenrollment's cause, but they weren't sure and were unable to act without more certainty and less financial risk to their actions.

### The Approach

The natural group to obtain answers from was the customers who left the health plan. Fortunately the client was able to provide a list of departed customers with accurate telephone numbers and other pertinent data. Deft designed a telephone survey with questions whose answers would confirm or reject suspicions, and then add to the client's current understanding.

### Results

The results confirmed some suspicions but rejected others and replaced those falsely presumed truths with evidence. The client learned:

- That departed customers did not find fault in the sales process (a suspicion).
- Which competitors had gained enrollees at the client's expense.
- The channels through which disenrollees had moved from the client to their new plan. Independent agents were involved in the switch 45% of the time.
- The most attractive features of the new insurer's service.
- The issues with the client's plan that motivated a search for a new insurer. One thing: it wasn't about price, most new insurers were charging the customer the same or more; another thing: there was one set of reasons for customers who were with the plan only a short length of time and another set for those who were with the plan longer.

The client was able to use the results to develop action plans within several departments. The report showed some elements of customer service that the client had already tried to fix, weren't fixed yet. And our analysis showed where the client should put its resources for the most gain in the quality of customer experience.