



Phoenix Health Fund Transforms CX with Premier's Cloud Contact Centre Solution

Case Study



Introducing Phoenix Health Fund

Over its sixty-five-year journey towards becoming Australia's second-fastest-growing health fund, Phoenix Health Fund has come a long way, figuratively and literally.

Phoenix Health Fund began its operation to support the influx of immigrating Scottish steelworkers of the mid-twentieth century, who were kickstarting Australia's steel manufacturing industry. The Scottish by birth organisation migrated its operation to Australia to better support local steelworkers, in 1953.

Even in those pioneering days, the focus at Phoenix was always on the health of their customers and providing robust and personalised support. This focus earned Phoenix the longstanding trust and successful growth they experienced and where

they have arrived today, as an organisation.

The current CEO, Sharon Waterhouse, has over twenty years of experience in the banking sector. Sharon was brought on board in 2014 to bring her experience and expertise to Phoenix to help scale the organisation, and make the funds available to a broader Australian audience.

As Sharon elaborated:

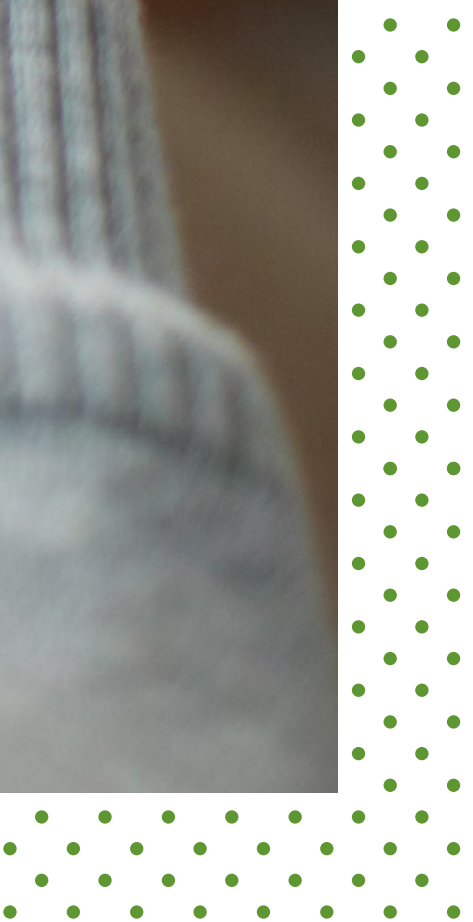
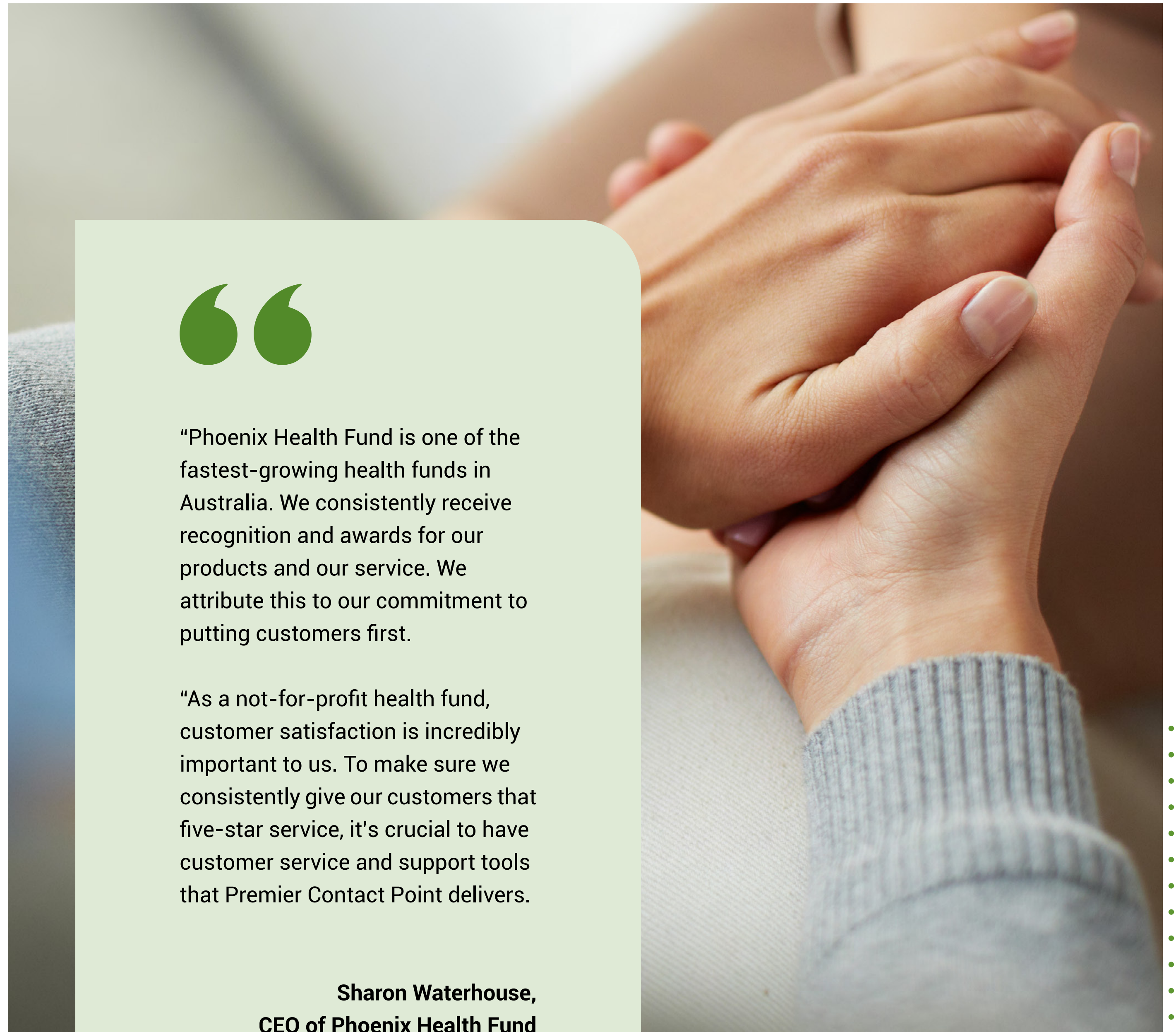
"When I started, the board wanted to grow the health fund beyond this traditional customer base of steel workers. I got the government's approval to open our health fund to all Australians, and ever since, we have been providing our products and quality service to any Australian that's interested in our products."



"Phoenix Health Fund is one of the fastest-growing health funds in Australia. We consistently receive recognition and awards for our products and our service. We attribute this to our commitment to putting customers first.

"As a not-for-profit health fund, customer satisfaction is incredibly important to us. To make sure we consistently give our customers that five-star service, it's crucial to have customer service and support tools that Premier Contact Point delivers.

**Sharon Waterhouse,
CEO of Phoenix Health Fund**





When I started with Phoenix, I was looking for a contact centre solution because the organisation did not have a robust contact centre solution in place. We used to manually answer phones and we did not have the required processes in place. I had already worked with Premier's solution in a former organisation I led. I was really keen to work with Premier again and have their solutions and support help lift the customer contact operation at Phoenix.

We needed a new system as soon as possible to provide more self-service options for our customers. As a small company, we operate during business hours only. However, our customers wanted 24x7 access.

"The other challenge we faced was having all of our team remote working, and that too suddenly. We had traditionally had some staff based at home, but now we had everyone working from home, and we needed our systems set up to enable our team to work wherever they needed to in Australia, or the world for that matter.

**Sharon Waterhouse,
CEO of Phoenix Health Fund**



The Situation

While they enjoyed success as an organisation, Phoenix Health Fund did have several vulnerabilities and limitations in the customer experience (CX) they were providing. A variety of challenges became apparent to Sharon as she began re-shaping the organisation to cater to Australia's general audience.

Sharon needed expert support and technology to get the best from her capable team and maintain the award-winning customer satisfaction they were known for.

Phoenix's CX Objectives:



Scaling a successful organisation



Expanding to an Australian-wide customer base



Remote Workplace Management for Staff



Upholding CX company values



Need for modern contact centre technology



I selected Premier for Phoenix's contact centre solution because I felt the team at Premier had the best combination of technology and personalised service. I knew they could help us set up a brand new system and train our staff, who had never used this technology before.

Sharon Waterhouse,
CEO of Phoenix Health Fund



Enter Premier

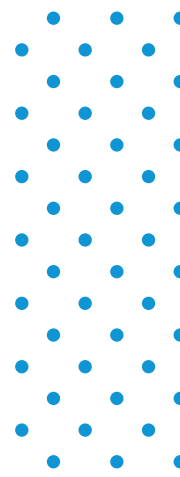
Sharon had experience of working with Premier five years ago while she was managing the contact centre team and operations at Newcastle Permanent Building Society. Premier had successfully deployed their contact centre system and provided the necessary training to ensure it was a success for the Newcastle Permanent Building Society. Sharon notes that it is still the system they use today, half a decade later.

With Premier being a known, trusted entity in the contact centre space, she reviewed them amongst competitors and found them the logical choice to work with again.

Sharon needed a system for her small team that could scale with the growing business and customer service team. She had seen Premier Contact Point deliver robust technology solutions and was confident in their ability to support call integration, chats, and messaging into one streamlined contact centre system and provide the vital training and support needed to make it a success.

As Sharon shared:

"I think it was definitely having that trust from working with them previously that made it very easy to choose Premier for Phoenix, and we've had a great working relationship."





Premier Contact Point has delivered a great combination of powerful technology and great personal service, which is what we at Phoenix try to deliver ourselves as a business.

**Sharon Waterhouse,
CEO of Phoenix Health Fund**

Outcomes

The relationship between Phoenix Health Fund and Premier Contact Point continues, with numerous projects on the CX front. The outcomes of the initial projects are already evident across the organisation.

In Sharon's words:

"The Premier system is easy to use. It's online so it can be accessed from anywhere, at any time. The system has helped enable our customer service and the help desk teams to become very responsive, and the uptime is very high.

The tools make it easy to maximise our staff availability and manage calls. We value our high average call answer rates

and low dropouts, and Premier's toolset makes it easy to measure and manage these variables very closely. When staff are away, we know exactly how many people we need at particular times of the day to make sure we meet our service levels. In terms of productivity, we've now got a comprehensive reporting suite so we can see the busiest times of day and week, and we can quickly perform quality reviews of our agents.

All facets we required to manage the customer service side of our business, we were able to realise with our Premier Contact Point system."

**Sharon Waterhouse, CEO of Phoenix
Health Fund**

Phoenix's CX Outcomes:



Easy for staff to use



Cloud-based - access anywhere



Highly valued help desk



Business insights from class leading reporting tools



Compliance and quality assurance with call recording and agent scorecards



When going from no contact centre system to a full-featured cloud-based solution, it was really important for me to know we would get the best-in-class solution and get it successfully implemented. Even though we're small, we are growing quickly and need to set things up properly from the start. I know I can trust Premier's solution to grow with our organisation which makes it easy as we have that reliable partnership and can continue to work with them as we grow.

Sharon Waterhouse,
CEO of Phoenix Health Fund



What's Next?

Like any mission, the journey to provide a consistent and trusted five-star experience to their Australian customers, is not over. While the outcomes of their work with the Premier team and the contact centre solution have already been realised across the organisation, Phoenix will continue working with Premier and progressively advance their customer service goals.

Phoenix and Premier have recently begun reworking their entire customer support process and managing their calls to counter their rapid growth with a more specialised approach. Sharon feels they have realised this potential from the trusted support

and quality solutions from the Premier team.

As Sharon elaborated:

"We are now also developing a forward roadmap with Premier, and I'm keen to set up and utilise a lot of the advanced features that we haven't used today. I want to get to a point where we can integrate the contact centre further, including our CRM system, to ensure our calls are recorded and seamlessly added into our CRM. We want to continue to make the whole contact centre process more efficient and effective, so it's easier for our customers to do business with us."



Hi, I'm Steve...



Is your organisation gearing up for a **CX Transformation project?**

For over 35 years, we've been helping a diverse range of organisations across Australia to deliver a better customer experience, and I'm confident that we can help your organisation as well.

The journey starts with a conversation, which gives us both a chance to understand how our software and our many years of experience, will help you deliver on your vision for transforming your organisation's CX.



Book a discovery session