



## Solutions for Medicare Plan Providers

### WHAT WE DO and HOW WE ADD VALUE

Person to Person Quality manages mystery shopping programs for Medicare and Medicaid plan providers across the country. We help you create and sustain a competitive advantage in sales and service quality, regulatory compliance standards, customer loyalty, and employee development, in an industry that faces challenges in educating, informing, and securing the trust of consumers. Our customized mystery shopping programs provide valuable intelligence about what's happening on the frontlines of all sales and service channels. Mystery shops are a valuable tool for sales and service employee training and development, sales agent relationship building, and evaluating compliance with company policies, CMS and industry regulations, and best practices – all of which help our clients become more profitable and create long-term value.

- ❖ **Face-to-Face Agent Meeting Shops**
- ❖ **Call Center Shops**
- ❖ **Community Meeting Shops**
- ❖ **Retail Kiosk Shops**
- ❖ **Website and E-Mail Service Shops**

### WHAT YOU GET

**Detailed reports** that go far beyond the CMS checklist to evaluate compliance, sales and service performance, and the customer experience

**Experience** managing highly successful mystery shopping programs for one of the insurance industry's leading brands

#### The Person to Person Quality Advantage

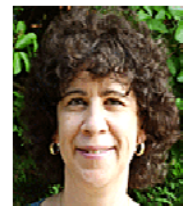
**Personalized service** that includes programs customized to meet your exact needs and goals. Our project managers are attentive, committed, and accessible

**Customized reporting** to make the shop results as useful and actionable as possible for all client stakeholders

Call or email us today to set up a  
mystery shopping program for the  
2011 Medicare AEP!



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## INDUSTRY EXPERIENCE

- ✓ Vendor since 2008 for one of the leading brands of insurance products, including Medicare Advantage, Medicare Supplement, Major Medical, Long-Term Care, Auto, Life, Dental plans
- ✓ Over 500 Medicare shops conducted during the 2008-2010 AEPs
- ✓ Evaluate compliance, sales and service quality, effectiveness of distribution channels and processes, customer experience
- ✓ All sales distribution channels: Face-to-face meetings, community meetings, retail kiosks, and call centers
- ✓ Approximately 850 total insurance shops completed in 2010

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## CASE STUDY - Mystery shopping program serves critical function in brand protection and quality control

### ✓ Situation

Our client is a membership organization for people over 50 and offers a full-line of branded insurance products to its members, including Medicare plans, long-term care insurance, major medical insurance for 50-64 year olds, auto insurance, and life insurance. In all, about seven million people are enrolled in its branded insurance products. In order to protect the client's brand and its members' interests, the client needs quality control measures to evaluate the carriers with which it has partnered on compliance, sales and service quality, and the overall member experience with agents, processes, and distribution channels.

### ✓ Solution

Person to Person Quality designed national mystery shopping programs for each insurance product and carrier, evaluating all sales distribution channels, including call centers, face-to-face meetings with local agents, community meetings, retail kiosks, and the web. Medicare Advantage channels and agents are shopped during the annual enrollment period. Over 100 different performance criteria are evaluated – including channel access performance, lead referral processes, response times, service quality, product presentations, compliance, and member satisfaction with telesales and field agents.

### ✓ Results

Four years into the client relationship, the programs Person to Person Quality manages have resulted in significant process improvements that have made the sales distribution channels work more efficiently for the clients' members. The client is able to address strengths and weaknesses in the member experience in a timely manner with its insurance carriers. Key metrics are measured on a quarterly basis to identify performance trends. Each quarter, Person to Person Quality presents the shop results to dozens of the clients' internal stakeholders, who in turn share the findings with insurance partners so action can be taken to constantly improve the member experience. The client uses the results to recognize outstanding performers at the call centers and in the field. The success of our insurance mystery shopping programs has resulted in the expansion of services to evaluate the member experience with the client's branded lifestyle products and discount programs.



Nationwide distribution of Person to Person Quality 2010 insurance shops