

MEDICAL CALL CENTER AUDIT CHECKLIST

PRESENTED BY:

CH Consulting *Group*

EXPERT GUIDANCE • PROVEN RESULTS



To be clear, an audit is not meant to point the finger of blame at one department or another. It's meant to be used as an organizational tool to identify current state gaps and become the catalyst that organizations need to drive strategic, long-lasting change.

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Expert Guidance • Proven Results

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PEOPLE

- When hiring agents, what are the minimum education and experience requirements?
- How often do you provide your agents with one-on-one coaching?
- How often do you conduct staff meetings to discuss patient satisfaction and customer service trends?
- How long is the on-boarding training for new agents? What does it entail?
- What communication channels are given to your agents to voice their feedback, concerns, etc?
- How often do you conduct refresher training? For agents? Supervisors? What is your turnover rate?

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PEOPLE

- Do you utilize a direct-hire, temporary hire, or hybrid agent model?
- Are your agents and supervisors provided with a clear, concise job description that details their responsibilities?
- Are your agents and supervisors able to articulate what their roles are in delivering excellent customer/patient experiences for your company as well as their day-to-day responsibilities?
- Are your agents empowered to make decisions for customers and possibly “bend the rules” as needed, or are calls escalated to accommodate any rule-breaking scenario?

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PROCESS

- Do you have any manual processes? If so, what are they?
- Do you have any automated processes? If so, what are they?
- Do you have a documented customer service policy?
Is it shared with your entire company and your customers?
- How are service policies communicated to your customers?
Ex. website, e-mail?
- Do you have a documented escalation policy?
- Do you have a documented set of Quality Assurance guidelines?
- Is it shared with your entire company?
- How are complaints monitored, tracked, and followed up on?
- What metrics are you currently tracking and what are your current service goals?

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PROCESS

- Do you find these goals are difficult to meet?
- Do you have documented call flows and diagrams?
- Do you currently have a documented customer feedback program in place?
- How are changes to policies communicated to staff?
- How often are your policies reviewed and revised?
- What internal and external benchmarking, if any, do you have in place?
- Which Key Performance Indicators (KPIs) are being used to monitor contact center efficiency?



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TECHNOLOGY

- What channels are available for customer support? Ex. phone, email, text, social media.
- What levels of reporting are available? Who is the reporting shared with and how often is it shared?
- What technology are you currently using to manage and tracking service requests/customer service issues?
- Does your technology provider assist you with compliance with state and federal laws?
- What technologies do you have in place that support automation?
- How long have you had your current technology solutions and when was the last time you considered new solutions?
- Do you currently have gamification technology in place?

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COMPLIANCE

- Do you currently have a strategy for personal information organization in your database?
- Have you created an inventory of personal information data for your California consumers? Do you also have this data mapped out to show relationships between third-parties?
- Have you reviewed your personal information disclosures (including those on your web page) and ensured they are compliant with CCPA?
- Have you reviewed your privacy policies to ensure they are compliant with CCPA?
- Do your policies reflect the CCPA requirement of accessing and deleting data upon request?
- Do you currently have processes in place to identify individuals responsible for deleting consumer data in response to consumer requests?
- Do you currently have processes and resources in place that preserves copies of “specific pieces of personal information that the business has collected about [each] consumer”?

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COMPLIANCE

- Do you currently have processes and resources in place for responding to “verifiable consumer requests” with individualized disclosures about the business’ collection, sales or disclosure of the personal information belonging to the specific consumer making the request?
- Do you have an incident response plan implemented in the event of personal information breach?
- Have you reviewed your third-party agreements to ensure they are compliant with CCPA?
- Have you reviewed your security practices and procedures?
- Have you checked to see if you are compliant with the sales opt-out and opt-in requests for California consumers?



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COMPLIANCE

- Are you sure that your practices are not discriminatory against California consumers who exercise their CCPA rights?
- Do you have the proper CCPA training in place for your employees, to ensure they understand consumer rights?
What appropriate measures are in place to secure data?
- Is HIPAA compliant for each agent up to date? Should be done annually.
- What are they storing?
- How are they storing it?
- Where are they storing it?
- What state compliance should be reviewed and met, especially around privacy laws?



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CH Consulting Group helps contact centers and BPOs across the world by optimizing their contact center operations, technology, sales and marketing. We are unique in our strategically ROI-focused approach where we are not just your consultants – we are your business partners, invested in YOUR success. If you believe it's time to run a customer service audit for your contact center, we would love to help! Give me a call at 218-286-4006 or e-mail me at christah@thechcg.com so that I can have a chance to learn more about your unique needs!

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