



Retail Organization

The SCOOTER Store

USAN's Customer Engagement Solution
Helps The SCOOTER Store Provide
World Class Service to Prospects,
Customers and Physicians



"As we look at our one- to five-year plan, I expect continued growth in our outbound calling. Looking at a partner like USAN to help us build on what we already have will just further our progress and the way we're able to engage our customers."



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About The SCOOTER Store

The SCOOTER Store was founded in 1991 and has grown to be America's leading supplier of scooters and power chairs for people with limited mobility. By adhering to its core ideology "Always Do the Right Thing", it has grown into a highly successful enterprise with a network of service specialists and locations in 48 states. The company not only maintains strict compliance with Medicare regulations, but goes even further by applying additional consumer safeguards and industry standards to its products and support.

Headquartered in New Braunfels, Texas, The SCOOTER Store employs 2500 people and is 40 percent employee-owned. Since its founding, the company has worked with more than 203,000 physicians to service more than 500,000 senior citizens and disabled people across the U.S. The company has also been repeatedly recognized by Fortune Magazine as one of the "100 Best Companies to Work For."

Challenge

The contact center, comprised of account managers and sales agents, is the heartbeat of business at The SCOOTER Store. It has evolved to support the company's rapid acquisition of new customers, largely driven by TV advertising, telemarketing campaigns and affiliate physician relationships. But with the success in acquiring more customers and prospects has come the increased responsibility of servicing and engaging those audiences. The SCOOTER Store's executive team recognized that supporting an increased number of customers and prospects—without sacrificing service quality—would require assessment and improvement of its systems, processes and personnel.

An operational audit uncovered system and procedural enhancements that could significantly improve agent productivity, effectiveness and service quality. For example, agents needed full access to real-time

INDUSTRY: Retail

COMPANY: The SCOOTER Store, a leading supplier of scooters and power chairs for people with limited mobility.

CHALLENGE

While handling more than 14,000 calls per day, trying to maintain agent productivity, effectiveness and service quality was impossible without an integrated calling solution and a flexible technology platform to support it.

SOLUTION

USAN's Customer Engagement Platform, Metaphor, combined outbound calling, IVR for inbound, management of marketing campaigns, workforce optimization and robust reporting capabilities into one platform that integrated with The SCOOTER Store's internal systems and databases, providing unprecedented business intelligence.

RESULTS

The number of monthly outbound calls has increased by 500%, allowing The SCOOTER Store to engage in better quality interactions with more customers. Metaphor is also helping The SCOOTER Store adapt quickly to new Medicare regulations as they occur.

In its selection process, The SCOOTER Store contact center leadership's decision criteria went far beyond just finding the best technology, but also heavily weighed each company's willingness to work with them as a close partner

customer account information and prospect data to complete interactions. Contact center managers also needed the ability to prioritize and schedule agents' calling activities and launch new campaigns without requiring IT support.

The challenge, however, was that the technology systems managing the sales and marketing campaigns and daily outbound dialing activities were hard-coded and inherently inflexible. Even small changes were difficult to achieve without significant IT involvement, typically requiring days or even weeks of development.

Additional challenges came from external market and regulatory pressures that required the contact center to be more responsive to new business opportunities by improving operational flexibility. For example, new Medicare regulations that become effective in 2011 require The SCOOTER Store to rent their power chair for 13 months before the customer owns it outright. The change in regulation is intended to be a seamless one for the Medicare customer, who should continue to receive the best possible price, service and support for their prescribed medical equipment. However, the change presents significant challenges for The SCOOTER Store: the company must modify and expand its business processes and systems, and also provide additional agent training. In addition to delaying receipt of payment for 13 months, The SCOOTER Store must also track and maintain the company's assets, in the form of power chairs, in customers' residences across the country. The business will need policies, guidelines and an infrastructure to support customers and the associated record keeping.

Solution

In order to meet these challenges, The SCOOTER Store began its search for a contact center system that would empower the business to more effectively manage its

day-to-day activities, marketing campaigns, Medicare requirements and account database. The project team's goal was to find a system that would enable:

- effective management of the company's 3.5 million prospects;
- non-technical design and management of telemarketing campaigns;
- high volume, outbound dialing
- scheduled calls automated by business rules;
- altering agent task priorities based on call results and inbound call traffic;
- agents to access account information in real-time;
- managers to assess results in order to prioritize activities for the next day;
- the future use of interactive voice response.

After evaluating several solutions providers, the company selected USAN as its technology partner to help manage its contact center operations. In its selection process, The SCOOTER Store contact center leadership's decision criteria went far beyond just finding the best technology, but also heavily weighed each company's willingness to work with them as a close partner. This meant creating a customer engagement system that provides significant advantages and allows them to integrate with and leverage their existing technology investments.

"Because of government regulations and requirements, The SCOOTER Store's sales process is fairly complex and requires a tremendous amount of detail. Interactive's solution presented an opportunity to build in tremendous efficiencies that we didn't possess before," said Brian Mullaney, senior vice president of the customer contact center at The SCOOTER Store. "USAN really helps us take advantage of more opportunities and manage what had previously been 'lost leads' – calls that we just weren't able to handle because we didn't have the right solution."

Today, USAN's OnSite contact center software and Metaphor Customer Engagement

Platform is the system of record that facilitates The SCOOTER Store's outbound call center activities. USAN's contact center software features include high volume, automated outbound dialing based on time zones and other business rules, a scriptable agent desktop with real-time account information access, agent performance monitoring and supervisory tools, and reporting on agent activity and campaign and demand generation results. In the near- future, The SCOOTER Store may also utilize out-of-the-box interactive voice response (IVR) capability for potential self-service and pre-treatment of inbound calls.

An open system, OnSite has been integrated with The SCOOTER Store's internal systems and databases to achieve unprecedented business intelligence that shapes day-to-day campaign activity. Far beyond simply providing contact center agents with the required customer and prospect information, USAN implemented the Metaphor platform that routinely cultivates The SCOOTER Store's 3.5 million customer and prospect lead database with automated business process and complex logic to generate optimized contact strategies based on actual business activity. Every day, Metaphor processes these pre-defined and configurable queries and business rules to refine contact lists, call times and agent assignment to maximize the next day's customer interaction activities. Expected results include increased contact rates, shorter

"With USAN's solution, we now have combined dialing, outbound calling operations and analytics in a single system. Especially attractive for us is the solution's IVR functionality that allows us to take advantage of touch point calls during the 13 months that a customer has one of our power chairs. This allows us to engage our customers and provide them with more value, and to do so with greater efficiency than with our previous process."

"Government regulations state that we cannot contact Medicare beneficiaries without them initiating the call first, so it is imperative that we have a system that allows us to respond quickly and efficiently to inquiries. USAN's solution has really enabled us to touch more lives with our products. With our old dialer, we were doing about 58,000 calls a month, and with the USAN solution, we're able to do about 350,000 a month. We're now able to respond to people who have expressed an interest in our products, and provide them with the information and help they need in a timely manner. And, because we have the ability to respond much more efficiently to our prospects and customers, it allows us to address each person's unique needs and really treat them as an individual."

Brian Mullaney
SVP, Customer Contact Center
The SCOOTER Store



call times, greater list penetration and many other performance metrics.

The Metaphor platform is comprised of standards-based tools and is highly compatible with The SCOOTER Store's current IT environment, which includes the Microsoft Operating System, SQL database, Visual Basic, and JAVA scripting.

Results

The Metaphor platform has helped the company significantly increase outbound call volume; agent productivity in terms of reduced handle time and after-call work; campaign effectiveness measured by an increase in sales; and customer satisfaction rates.

And, the customizable agent desktop has simplified agent tasks by unifying activities into a single interface.

The SCOOTER Store conducts well over 20 direct marketing campaigns at any one time and handles more than 14,000 calls per day. The company's contact center agents use USAN's solution to respond to Business Reply Cards, e-mails, and voice mails; manage prospect and customer data; synchronize leads; and prioritize outbound daily activities for 60+ agents and callers. Behind the scenes, the USAN solution automatically polls call results every 15 minutes and re-prioritizes tasks based on results. Additionally, real-time reporting features allow The SCOOTER Store to constantly analyze key agent data in a web-based portal to make strategic decisions for the business. USAN's flexible technology platform is also enabling the company to adapt to new challenges, such as the government-mandated Medicare regulations, as they occur.

Measuring Results and "Daily Huddles"

Fundamental to The SCOOTER Store's results has been its focus on three core business principles – setting priorities, monitoring results, and regular meetings. Each quarter, the company's CEO Doug Harrison sets and communicates objectives for the company, and departments are tasked with carrying out these objectives, along with specific performance metrics. Properly monitoring results requires that key operational data is collected as tasks progress, such as agent call results and product quality test results, compared to specific metrics, and reported on a regular basis.

Each manager is required to report progress-to-plan at 'Daily Huddles,' meetings held throughout the organization in 'Situation Rooms.' Each room showcases graphics that illustrate the overarching customer and business priorities, along with the current quarter's metrics and key performance data, keeping managers focused on the company's highest priorities on a regular basis.

The detailed data about all aspects of the outbound contact center required for these huddles, such as call results and campaigns, is collected from the USAN system as activities take place. As required, this data is summarized and presented via scorecards at the huddles, helping to ensure that the department is meeting its quarterly metrics. And, as The SCOOTER Store looks to the future, it expects that its outreach to prospects and customers in the form of outbound calling will continue to grow.



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About USAN

USAN helps companies profitably engage customers and deliver amazing cross-channel experiences with the industry's best cloud, premise and hybrid multi-channel customer engagement solution. From traditional telephone interactions to the web, social media and everything between, USAN's portfolio of call center products gives users infinite flexibility in the way they engage customers across channels. In addition to campaign management, back-office integration, and business process automation, USAN's offerings include Hosted IVR, ACD, and Dialers built upon a fifth-generation carrier-grade infrastructure that delivers "five nines" of availability and proven scalability.

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