

LMS e-Learning Implementation Podcast Transcript #5 *Interview with Candace Hall*

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Mary Kay Lofurno: Welcome to the next edition of the [SyberWorks LMS e-Learning-Implementation Podcast Series](#), where we look at actual [learning management systems](#), implementations, and e-Learning program rollouts. My name is Mary Kay Lofurno; and I'm the marketing director here at [SyberWorks](#) and your host today. In this edition, we will be [talking with Candace Hall, Compliance Officer for Universal Healthcare, Inc.](#), about their use of the [SyberWorks web-based learning-management system](#) to provide sales and compliance training for their general agents.

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Mary Kay: And now we will begin our [interview with Candace Hall, Compliance Officer for Universal Healthcare, Incorporated](#). Good afternoon, Candace; thanks for coming to talk with us today.

Candace Hall: Thank you, Mary Kay; it's a pleasure.

Mary Kay: Thank you. Tell us about your company.

Candace: Universal Healthcare is a Medicare Advantage organization with a Medicare contract. We have HMO and private fee-for-service products for Medicare beneficiaries. We've been in Florida since 2002. Recently, we've experienced what can only be called explosive growth. In 2007, we moved into seven new states.

Mary Kay: Wow.

Candace: "Wow" is right.

Mary Kay: That's amazing! Can you give me a brief overview of who is using your [SyberWorks Learning Management System?](#)

Candace: We have the system for licensed insurance agents in these seven new states that are contracted with our field-marketing organization. These organizations are affiliated with the company across the states. The agents access the system from their offices or homes to learn about our company, our products, and the Medicare regulations that oversee marketing of our products. Some of these agents are familiar with Medicare but know nothing about our company. Others have never sold Medicare before and have no idea of the level of regulations that are required.

Mary Kay: Wow. I bet you there's a lot of regulation.

Candace: As a Medicare-contracted HMO, we are carefully monitored for marketing requirements and are responsible for the actions of all our representatives. When we made the business decision to move aggressively into these seven states with agents who, we needed to ensure, had proper [training](#) in these detailed marketing requirements. Any violations put us subject to fines or possible restrictions. As I said, some of the agents we were dealing with had never sold Medicare before and had no idea of the rules we're talking about. Getting this information out to them had to be done without spending a fortune on training staff, and it had to be done on a very short timeline. As a growing company, we allocated our time and resources very carefully. Most of those resources were being allocated toward staff that was going into marketing and information from memory. The venture into the new states was expensive, and so we needed to do our training efforts on something that was very cost-effective.

Mary Kay: So what were some of the key business and system requirements that were important to your company's [online training](#) program when you were looking at various [e-learning solutions](#).

Candace: Our methodology to get this information to as many people as possible as quickly as possible and to be able to document that they had learned it, or been exposed to it at least, and that they understood the information. That was one of our most important functions that was needed - documentation that they had seen the material and understood it, because we are accountable to Medicare for these agents.

Mary Kay: OK. Can you tell me about the [online courses](#)? Maybe you could break down the online courses and the things that you cover in them.

Candace: We divided the courses into two categories. There was the compliance function, which focused on the Medicare regulations; these are rules and regulations, including standards of conduct, what you can and cannot say in presenting the products to the potential members, the details of how certain types of products work; these are the kinds of things that fell in the compliance category. The second part of our [courses](#) was related to the product itself; we went through the actual presentation that was used to show the product to members; we explained the presentation and, in essence, trained the agent about how to sell the fee-for-service product to members. It was interesting experience for our marketing director, because he had always done it face to face. But he said that, in the end, it was the same effort as [training](#) a new agent.

Mary Kay: Wow; that's interesting. Can you tell me what [course development tools](#) you used to construct your [online courses](#)?

Candace: The online training basically was constructed by [SyberWorks](#). We gave them content. They structured it; it was their staff that did the actual recording; they helped us organize the material; they produced the [testing](#) function that allowed us to certify that the participants had been through the material. They did most of it themselves.

Mary Kay: Can you tell us a little bit about the process of working with [SyberWorks e-Learning development services](#)?

Candace: It was great. It really was great. Our subject-matter expert did not have to leave the office - and we couldn't, at the time, because we were very busy with getting into the new states. They recorded a [web conference](#) with us, a few things we sent to them in email using our own documents; and then, from that, they just produced it. They also re-recorded our material, using professional voice talent, which added a lot to what we were doing.

Mary Kay: Well, that's great. I understand your campus was configured to accommodate varying levels of access by agents and general agents and others, with customized reporting at each level. Can you tell us a little bit about the business rationale that went along with these special system requirements?

Candace: We have to document, for Medicare, who has been trained, who has not been trained; and, in our contract relations with the field-marketing organizations, it was necessary for those agencies to be able to certify the specific representative - that he had been through the [training](#). And there were too many of them in the end. We have 11,000 agents on the system, and there were too many for me or my staff to keep up with; so we made it possible for the individual FMO's to keep up with them themselves. That was a function that was available through [SyberWorks](#) that was very, very helpful for us.

Mary Kay: Well, that sounds great. [Why did you choose SyberWorks](#) and their [Learning Management Systems](#) to develop and manage your training?

Candace: We looked at several companies. The quality from [SyberWorks](#) was very good. We were very pleased with them. They offered us the professional appearance, professional capability, the testing, all of that. They also were able to do the quick turn-around time that we desperately needed.

Mary Kay: Well, that sounds great. Can you tell us a little bit more about your [customer experience](#) with SyberWorks?

Candace: As I said, we're growing, and it's a new company; and there were always things that we hadn't thought of. And we kept having to go back to [SyberWorks](#) for new items and changes and tweaks and things we hadn't thought of that we were going to need. They were very, very receptive. I've been very impressed by their cooperative attitude. And the skill level that we bumped into was very, very helpful. One of the things that came up was that, at one point, we realized that we were going to need Social Security Numbers. Of course, that's a HIPA-level requirement, and they were able to convert that level of [security](#) for us. So that was really good.

Mary Kay: You know, this all sounds terrific, Candace; and I just want to thank you for joining us today.

Candace: It was very much my pleasure. I will say that I have been impressed and am very much able to recommend [SyberWorks](#) to anyone.

Mary Kay: Well, thank you. This is Mary Kay Lofurno, marketing director at [SyberWorks](#). I wish to thank you for listening to our [interview with Candace Hall, from Universal Healthcare](#), on the [SyberWorks LMS-e-Learning-implementation podcast series](#). Talk with you next month! Thanks!

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