

**CASE STUDY:  
Research Determines  
Member Satisfaction and  
Retention Factors for  
Health Plan**



**Client:** Medicare Advantage Plan

**Issue:** To establish a baseline for the level of member satisfaction, determine key elements prompting customers to choose their plan, and understand member feelings about the health plan experience as an indicator of member retention.

**Methodology:** Phone survey with 2,000+ people in four states

**Research ROI:** High levels of satisfaction were indicated both in the aggregate and in each of the geographic markets that were tested. Key factors that caused people to join the plan were determined and prioritized in addition to retention drivers.

The CMO received important marketing data that could be shared internally and used by the marketing team to refine and direct communications with customers and prospects. The client also received an extra bonus when several hundred people told us they wanted to be contacted directly by the company!

