



**OPEN ACCESS BPO & THE
INSURANCE CLIENT:**
PASSIONATELY WORKING AS ONE

Meet the Team



BEN DAVIDOWITZ,
CHIEF EXECUTIVE OFFICER

- Established Open Access BPO in 2006
- Leads business development, marketing, and sales
- 24 years of call center management experience



HENRY CHANG,
PRESIDENT

- Co-founder of Open Access BPO
- 20+ years of experience, mostly centered on the finance sector
- Oversees Open Access BPO's internal operations



JOY SEBASTIAN,
GLOBAL VICE PRESIDENT

- 20+ years of experience in BPO operations management
- Manages client relationships, service delivery, and support functions across all Open Access BPO centers



ARVIE MENDOZA,
IT MANAGER

- 15 years of IT experience from various top BPO companies
- Manages the company's networks, communication systems, databases, and tech facilities



EMELDA PEREZ,
HR MANAGER

- 10+ years of career experience
- Manages Open Access BPO's overall human resource functions, including labor management and strategies



CRISSY TUAZON,
EXECUTIVE PROGRAM
MANAGER – INSURANCE CAMPAIGN

- Manages client communication, and oversees various program operations in OA Makati
- 14 years of experience in customer support operations

OPEN ACCESS BPO:Our Vision, Mission, Core Values

VISION

To be the global BPO leader
providing the best results through
its industry-leading customized
solutions

MISSION

Open Access BPO provides dynamic solutions enabling growing businesses to create more impactful customer experiences and increase operational efficiencies in an ever-connected world.

CORE VALUES

- Put Customers First
- Do the Right Thing
- Make Awesome Happen
- Celebrate Diversity
- Work as One Team, One Family

Our People

We're proud to have an ever-growing and culturally diverse team.

1,226 employees

- 919 in Makati, Philippines
- 225 in Davao, Philippines
- 30 in Taipei, Taiwan
- 11 in Xiamen, China
- 41 in Las Vegas, USA

88 employees for foreign languages



Since 2018, we at [Open Access BPO](#) has been passionate about working with the Insurance Client, helping you execute accurate and strategic back-end solutions that improve customers' experiences and business performance. As your business Needs to grow, we will continue to provide highly flexible and scalable solutions that further strengthen your company's back-end systems.

2018

June

- Introduced to the Insurance Client
- Started doing tasks under Dashboard
- Continued using Platform

August:

- Started using Dashboard
- Number of agents increased to 71

2019

- **February:** Insurance Campaign acquired 78 agents handling Fulfillment
- **March:** Restructured the whole team according to task types
- **June:** Started handling Commissions
- **July:** Acquired 8 agents who handle Renewal Management
- **August:** officially started with 3 agents
- **December:** Acquired 7 agents for the team

2020

- **March:** The whole team shifted to the work-from-home setup.
- **August:** Acquired the Project for audits
- **July:** Started new projects using new platform

2021

- **September:** Acquired agents under payment processing for Acquisition

Program Overview

- Partnership since 2018
- 5 Teams (Audits, Commissions, Fulfillment, Renewals Management, and Lead)
- 96 FTEs organized into 8 teams + 1 QA team
- Two shifts covering US and non-US business hours

Open Access BPOs Back Office Solutions for the Insurance Campaign

With the current headcount, our teams handle the following work areas for you:

FULFILLMENT	COMMISSIONS	RENEWALS MANAGEMENT	AUDITS
<ul style="list-style-type: none">• New hires and follow-ups• Termination and follow-ups• Qualifying events and follow-ups• Cancellation and follow-ups• Open enrollment and follow-ups• Demographic changes and updates	<ul style="list-style-type: none">• Statement Retrieval. Agents pull commissions/compensations statements via website, email inboxes (Finance Department and Payment Processing), or the Centrifry portal, in PDF or spreadsheet format.• Formatting. Agents summarize the statements to a much more readable version as per given instructions depending on the carrier.	<ul style="list-style-type: none">• Plan loading. Building and setting up plans on the platform.• Audit. Auditing the loaded plans on the platform.	<ul style="list-style-type: none">• Compare carrier data with the information in Zenefits to confirm enrollments, premiums, etc.• Identify possible billing issues.• Verify the data used to complete the scrub and ensure that formatting is correct to be able to run the correct formulas.



Potential Areas of Services

As the Insurance Campaign grows and its business needs evolve, we strive to maintain the same level of performance, efficiency, and quality across various work areas. Our team capabilities that can be explored are the following:

- Company Address Change
- Online Access – maintaining and managing portal credentials
- Group Open Enrollment – processing and sending documents for group-level changes
- IE/Switch Fulfillment – processing and sending documents for incoming groups
- COBRA Member-Level Tasks
- Group Audits – auditing of all groups during open enrollment
- Form Mapping – mapping application forms
- Customer Escalations – fixing escalated issues and complaints
- Payroll – setting up payroll upon onboarding

Scale Your Operations at Open Access BPO

Ready expansion support

- Ready to scale your Makati team
- Familiarity and expertise in the client's back-end processes

Highly scalable staffing

- Access to large talent pool of qualified and experienced professionals
- Targeted recruitment process

Strategic management

- Cohesive leadership structure through centralized management approach
- Consistent quality and performance

Flexibility and agility

- Ability to respond to partners' changing business needs, helping you maintain a high level of performance as you grow



The Insurance Campaign Team at Open Access BPO

