



FROM ATTRITION TO MISSION

How Data and Purpose Stop the Revolving Door

- Jim Iyooob - Chief Customer Officer, Etech
- Chris Basile – VP Call Center Operations, Phone.com
- Shawndra Tobias – Vice President Customer Experience, Etech



Meet Our Speakers for Today



Jim Iyooob
Chief Customer Officer
Etech Global Services
jim.iyooob@etechgs.com



Chris Basile
VP – Call Center Operations
Phone.com
cbasile@phone.com



Shawndra Tobias
Vice President - CX
Etech Global Services
shawndra.tobias@etehtexas.com



Jim Iyoob

Chief Customer Officer

Jim is a 33-year veteran of the call center/BPO industry. He is passionate, driven, and an energetic business leader with a strong desire to remain ahead of the curve in outsourcing solutions and service delivery.

Jim has an impeccable track record of innovation and advanced business intelligence. He has been instrumental in setting up solutions for brands looking to optimize and automate their daily customer experience needs.



Recognized by 



Subscribe to
Jim's Newsletter



Agenda

Visit Our Booth #408

- Introduction to Etech
- Building an Integrated Contact Center & Performance Management Infrastructure
- Case Study



OUR STORY



OUR BUSINESS



Customer Engagement Solutions

Inbound & Outbound Interactions, Chat, Sales, Service, and Tech Support



Etech Insights

Actionable Insights for Total Quality Management to Enhance Operational Efficiency and Customer Experiences



Technology Solutions

Etech Technology Solutions

Software/Application Development, Custom Reporting, WFM

OUR AWARDS



Why Data-Driven Decision Making is Crucial?



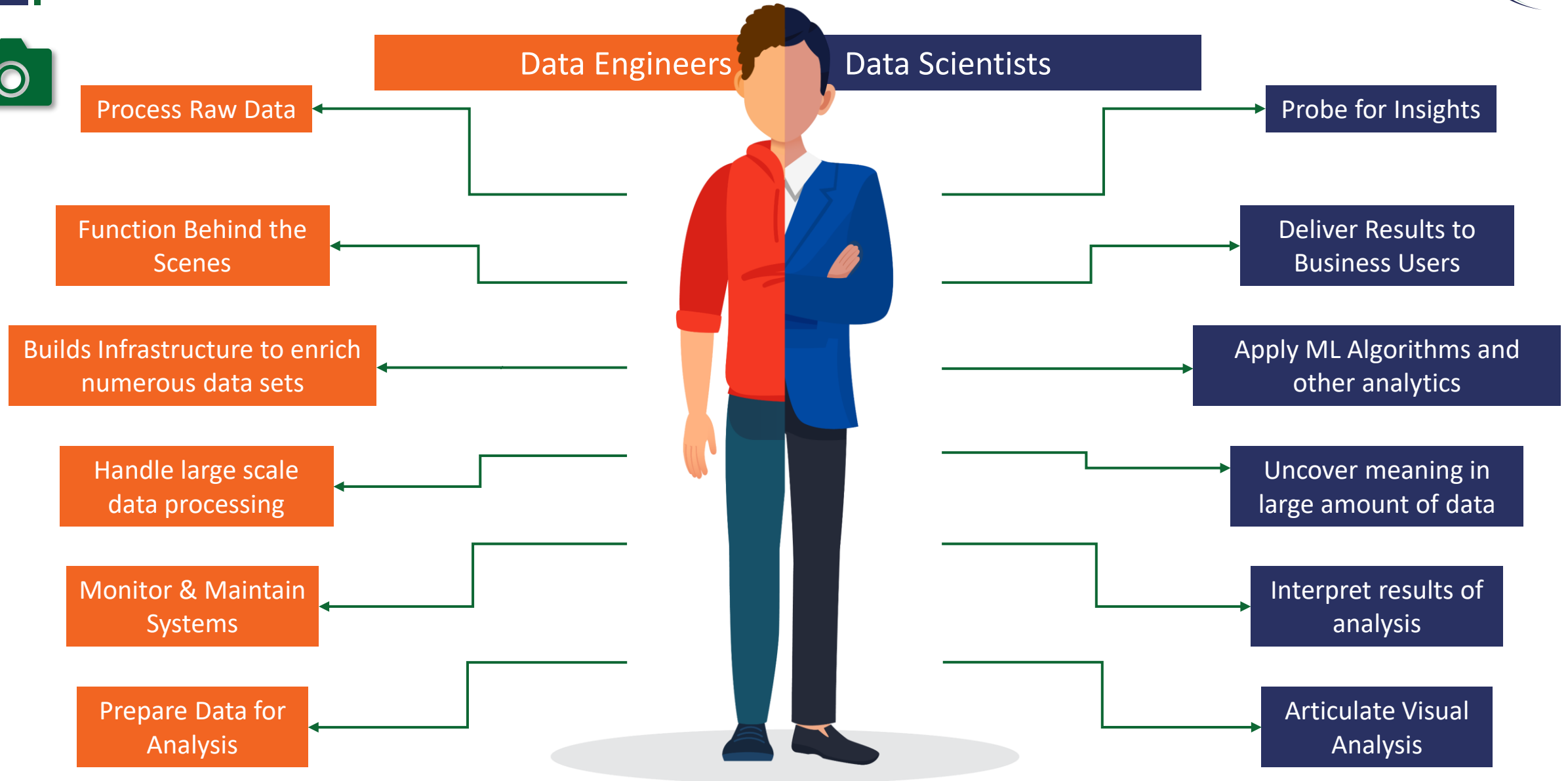
ALL THOSE AWESOME DATA-DRIVEN BUSINESS INSIGHTS



AND YOU WANT TO GO WITH YOUR GUTS?!!

- Greater Transparency and Accountability
- Continuous Improvement and Innovation
- Faster Decision-Making Process
- Clear Feedback for Market Research

Let's Understand the Difference!



Machines Without Humans: What do you think about this picture?



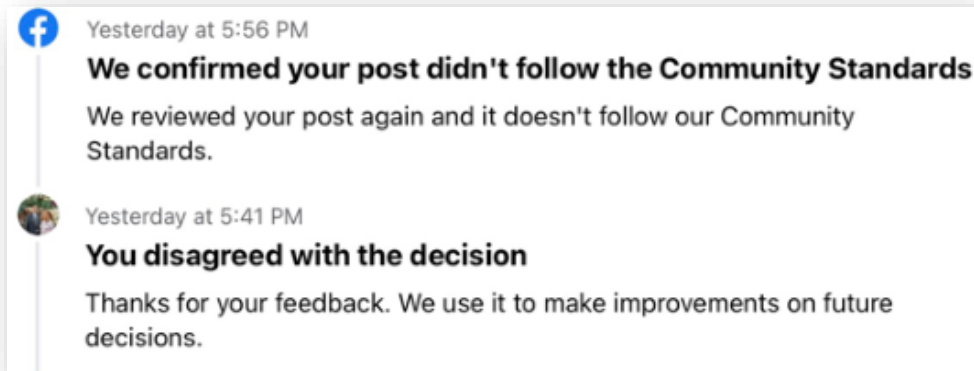
OLD AGE

TO REACH OLD AGE WITH WISDOM...
ONE HAD TO BE
YOUNG AND STUPID
WITH A LOT OF
LUCK

Do you think it is spreading hate or injury?

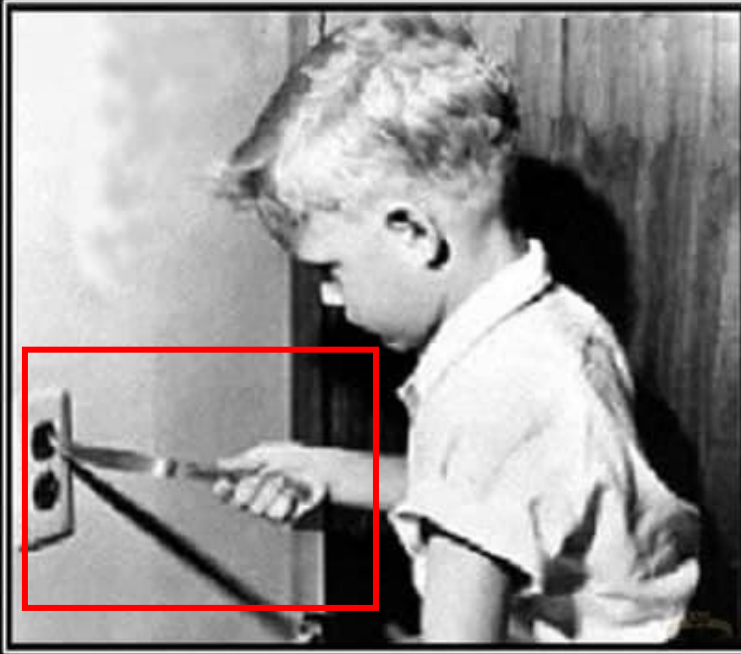


Facebook thinks it is against their community standards.



I appealed against this decision and they disagreed

100% Technology without the Partnership of Human Intelligence



OLD AGE

TO REACH OLD AGE WITH WISDOM...
ONE HAD TO BE
YOUNG AND STUPID
WITH A LOT OF
LUCK

Machine Learning without Human Intelligence equals Censorship!

Apr 19, 2022
You can't go live for 18 days


Why is your account restricted?
A post from the last year didn't follow our standards.

Jim Iyoob
You shared this on your profile
CLOSED - Apr 19, 2022

- LIVE** Restriction · Apr 19
You can't go live for 18 days
- Messages** Restriction · Apr 19
You can't advertise for 18 days
- f** Restriction · Apr 19
Your group posts will be moved lower in Feed for 18 days

Beating the System: Machine Learning with Human Intelligence



A background image of a call center with several employees wearing headsets. A semi-transparent blue rectangular box is centered over the image, containing white text. There are two small squares: a light grey one in the top left and a yellow one in the bottom right.

Performance Management Storybook -Case Study

Shawndra Tobias

Vice President – Customer Experience

Shawndra is a 25-year veteran of the call center/BPO industry. Shawndra has served in various roles to include OSS Reporting Specialist, Project Lead, Account Leader, Sr. Director Customer Experiences, Asst. Vice President and now Vice President.

She received her professional certification in Data Science from Johns Hopkins University and is a 3 Star IBM Recognized Data Expert. She also has extensive Project Management experience applying PMI philosophy.



Recognized by 



- Natural Language Processing (NLP) is a subfield of artificial intelligence (AI). It helps machines process and understand the human language so that they can automatically perform repetitive tasks. Examples include machine translation, summarization, ticket classification, and spell check.
- In natural language processing, human language is separated into fragments of unstructured data so that the grammatical structure of sentences and the meaning of words can be analyzed and understood in context. This helps computers read and understand spoken or written text in the same way as humans.

“Each word of an interaction represents
1 piece of unstructured data”



- Data Scientists teach NLP tools to look beyond definitions and word order, to understand context, word ambiguities, and other complex concepts connected to human language. **This is your EI Data Engineering team.**

20 Minutes of AI



Navigation: Home, Dashboards, Reports, Search, Labels. Help, ST

Search: Search for keywords or phrases. Advanced, Filters (1), Graphing, Export

Agent Impact Score: 5.3 | Tethr Effort Index: 5.3

Zendesk_TicketCalls, Felecia Fearon Today at 12:39am · 7 min

[T2] Effort: A: Acknowledgement [T2] QA: Agent Name : Greeting- Agent Introduction Greetings- Opening -Thanking the customer A - Email verification [ST QA] Verify - DOB [ST QA] Greeting [ST QA] Agent Name [ST QA] Acquire - Name [ST QA] Acquire - Email [ST HC] Calling on Behalf : Empathy-Apology : Positive Sentiments Negative Sentiment Certificate issue identifier (2) eDriving: A : Authentication - DOB eDriving: Call Driver: Certificate Status eDriving: Agent Identifier - Customer eDriving: Agent Identifier - Agent A : Authentication - DOB : A : Authentication - Name Agent Identifier - Agent (3) Agent Identifier - Customer [ST Effort] A: Probing Questions [ST Effort] A: Acknowledgement [ST Effort] A: Proactive Guidance - Education [ST Effort] C: Web: Login/Password (2) [ST Effort] C: Web: Homepage

Agent Impact Score: 4.3 | Tethr Effort Index: 4.3

Zendesk_TicketCalls, Tiffany Tomlinson Today at 12:29am · 9 min

[ST Effort] High Effort Sentiment, No Churn [T2] Effort: A: Powerless to Help [T2] Effort: A: Acknowledgement [T2] Effort: A: Advocacy - Initial Provide Help [T2] Effort: A: Set Expectations - Follow Up (2) [T2] Effort: C: Confusion (2) : Greeting- Agent Introduction A - Assurance of Help Greetings- Opening -Thanking the customer (2) : A - Email verification A : Further assistance (2) Conversation - Power Words [ST Discount] Member/Membership [ST Discount] General Inquiry [ST QA] Offered Further Assistance [ST QA] Offer Assistance [ST QA] Closing - Further Assistance (4) [ST QA] Acquire - Name [ST QA] Acquire - Email : Advancing the course Empathy-Apology Resetting the password -Identifier (4) Positive Sentiments Negative Sentiment (2) Agent confidence [ST QA] Statement of / Initial Help eDriving: A : Authentication - Name eDriving: Call Driver: Login Issue (3) eDriving: Agent Identifier - Agent (2) eDriving: A : Further assistance A : Authentication - Name Agent Identifier - Agent (4) Assuming Sale Password Reset (3) [ST Effort] C: Confusion [ST Effort] A: Acknowledgement [ST Effort] A: Advocacy [ST Effort] C: Web: Login/Password (4) [ST Effort] C: Company Communications A: Powerless to Help C: Confusion (3)

Agent Impact Score: 5.2 | Tethr Effort Index: 4.2

Zendesk_TicketCalls, Joyianne Evans Today at 12:24am · 10 min

[ST Effort] High Effort Sentiment, No Churn [ST Effort] High Effort Interaction Handling, No Churn [ST Effort] Company Communications: Frustration [ST QA] Hold Request [T2] Effort: A: Acknowledgement (7) [T2] Effort: C: Frustration (3) [T2] Effort: A: Advocacy - Initial Provide Help [T2] Effort: A: Set Expectations - Follow Up [T2] Effort: C: Confusion [T2] Effort: C: Uncertainty [T2] Seed: A: How May I Help? [T2] QA: Close [T] Seed: A: Acquire Cancel Reason (2) : Greeting- Agent Introduction A - Refund Details (4) : - Assurance Of Help (2) Greetings- Opening -Thanking the customer A - Email verification A: Thanking for Hold Agent Effort - Acknowledgement A : Further assistance Conversation - Power Words (2) [ST Payment] Previously Made [ST Bill] Refund/Credit Inquiry (8) [ST QA] Verify - DOB (2) [ST QA] Offered Further Assistance [ST QA] Offer Assistance (2) Greeting [ST QA] Closing - Further Assistance [ST QA] Close (2) [ST QA] Agent Name [ST QA] Acquire - Name (3) [ST QA] Acquire - Email [ST Account] Review [ST HVR] New reservation :Verification Process - Unlocking Account : Advancing the course Empathy-Apology (4) Closing (3) Refund Calls Identifier (9) Positive Sentiments (3) Negative Sentiment (4) : Positive Response (3) [ST FI] A: Balance Advisement Agent confidence [ST QA] Statement of / Initial Help eDriving: A : Authentication - Name eDriving: A : Authentication - DOB (2) eDriving: Product Driver - Follow-up Courses (2) eDriving: Call Driver: Unable to Advance eDriving: Agent Identifier - Agent (2) eDriving: A : Further assistance eDriving: C : Authenticated - Name : A : Authentication - DOB (2) C : Authenticated - Name Agent Identifier - Agent (6) Assuming Sale (2) eDriving: Sales Queue Identifier eDriving: Call Driver: Retake Course (4) [ST Effort] C: Frustration [ST Effort] C: Confusion (3) [ST Effort] C: Can't Understand You [ST Effort] ESC: Internal - Supervisor (3) [ST Effort] A: Acknowledgement (2)] A: Advocacy [ST Effort] A: Expectations Setting [ST Effort] C: Company Communications A: Advocacy C: Confusion (2)

Agent Impact Score: 7.2 | Tethr Effort Index: 4.2

Zendesk_TicketCalls, Tiffany Tomlinson Today at 12:19am · 13 min

[ST Effort] High Effort Sentiment, No Churn [T2] Effort: A: Acknowledgement (2) [T2] Effort: C: Uncertainty : Greeting- Agent Introduction A - Assurance Of Help : Greetings- Opening -Thanking the customer A - Email verification (2) A : Further assistance (2) Conversation - Power Words [ST Discount] General Inquiry [ST QA] Offered Further Assistance [ST QA] Greeting [ST QA] Acquire - Name [ST QA] Acquire - Email (2) [ST TCOM] Issue - No service connection [ST Scheduling] Next Appt [ST Scheduling] Reschedule : Complete Course Information - Sale call Only : Advancing the course (2) : Empathy-Apology (2) Negative Sentiment Hold Identifier eDriving: A : Authentication - Name eDriving: A: Survey Request eDriving: Product Driver - Get Insurance Discount eDriving: Agent Identifier - Agent A : Authentication - Name Agent Identifier - Agent (6) eDriving: Mature Insurance Savings eDriving: Safety Course (5) eDriving: Adult Driving Course [ST Effort] C: Confusion [ST Effort] C: Channel Switch - Website (2) [ST Effort] A: Probing Questions [ST Effort] A: Acknowledgement (2) [ST Effort] A: Advocacy [ST Effort] A: Proactive Guidance - Education [ST Effort] C: Web: Login/Password (2) [ST Effort] C: Web: Homepage (2) C: Confusion (2)

What's the big deal with BIG DATA?



Putting it all together



1. Data



2. Sorted



3. Arranged



4. Presented Visually



5. Explained with a Story



A Tale of Two Call Centers...

Center Alpha

Tenured leaders with 8+ years of campaign experience

Core team with 5+ years of experience

Using AI-Powered Speech Analytics for reactive performance management

Leadership

Campaign

Technology

Center Beta

Leaders with 6+ years of experience, but not in relevant campaign

No core team. Onboarding fresh team members

Using AI-Powered Speech Analytics in partnership with Etech Insights for:

- Proactive design training
- Nesting
- First 30-day performance management

Cascading Effects: The Great Resignation

Center Alpha

The sustained retention rate is 94.20%

Absence of brand experts because of less tenured team members

Struggle with workforce management and pays penalty on schedule adherence

Leadership

Campaign

Technology

Center Beta

The 90-day retention rate is 97.39%

A proficient team of brand experts

Using effectiveness rating and Big-Data performance management

Predicting the Future Based on Past Data



A 0.25% increase in the AFS results in an increase of \$0.86 in Revenue/Online Hours

Improvement by +0.5% ▲
AFS: 42.80%
Forecasted Revenue: 1,886,213

Improvement by +1% ▲
AFS: 43.30%
Forecasted Revenue: \$1,947,507

Improvement by +2% ▲
AFS: 44.30%
Forecasted revenue: \$2,070,095

Current State: 42.30
AFS : 42.30%
Forecasted Revenue – \$182,4900

Increasing the Ask for sale score by 2% will result in an increase of \$245,195 Overall Revenue

\$51.21

\$52.93

\$54.65

\$58.09

42.30%

42.80%

43.30%

44.30%

Current State

Future State +0.5%

Future State +1%

Future State +2%

— AFS Adherence — Rev/Online Hours(Forecast)

90-Day Retention Data

Campaign/Site	Begin HC	Net Count	Term for Begin HC	Term within a month	Retention %
Alpha	448	507	26	0	94.20%
Beta	230	227	6	0	97.39%
Gamma	521	591	27	0	94.82%
Delta	214	211	6	0	97.20%

Overall Company-wide Retention 91.89%



Open Discussion

Most Common Questions, Answers & Use-Cases

- What are some of the most common questions about using an AI-Powered, large volume dataset to manage human experiences?

1: How do we get out of the checkbox mentality? This has been the standard of our industry forever.

2: I like the idea of using “big data” to get a directional map of performance at scale. How do I get my team to use it?

3: You’ve talked a lot about performance management of people. What about business insights? What are some examples of strategic business intel that can be derived from your process?

4: My company tried using Joe’s Speech Analytics platform. The words were transcribed incorrectly, I can’t hold my people accountable to this and it just looks wrong. How do I know the information I’m giving my people is accurate?

5: How quickly can you produce data?

Question: 1

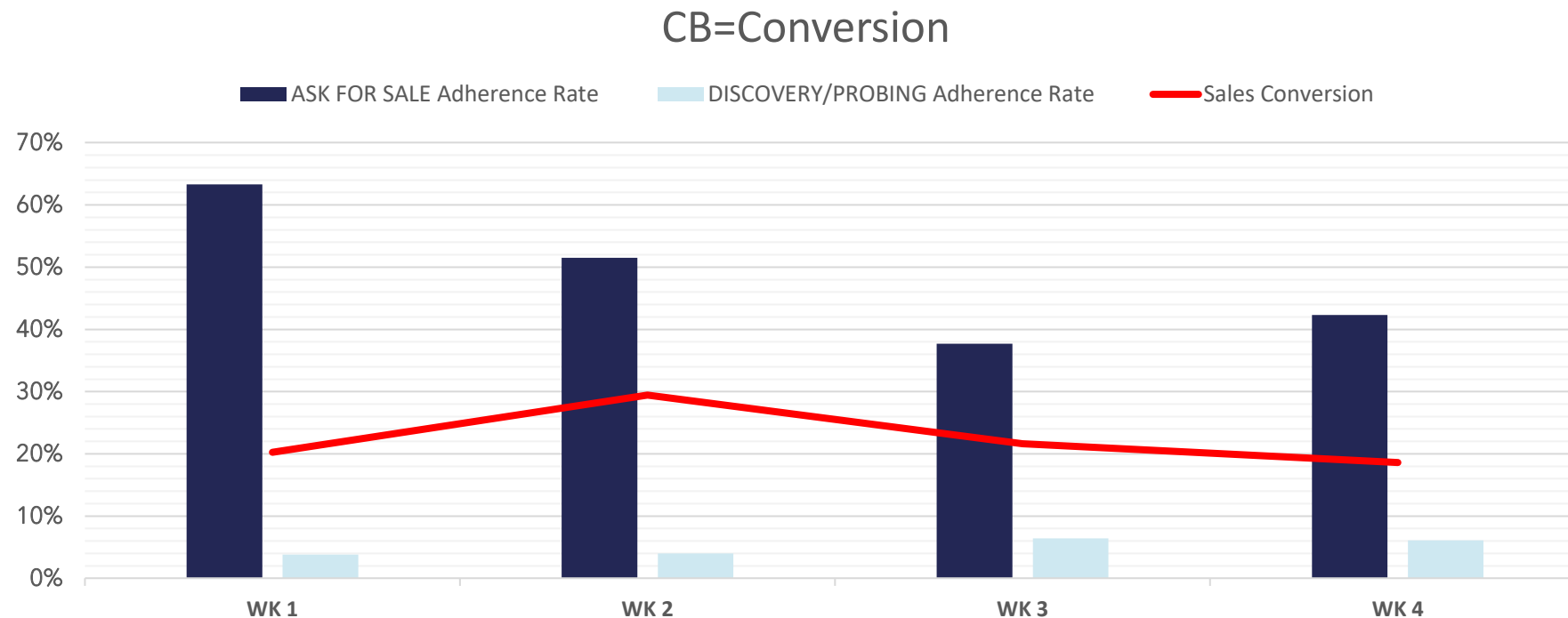
Q: How do we get out of the checkbox mentality? This has been the standard of our industry forever.



A: Understand directional scale. Apply KPB Indexing and focus on critical behaviors

Q1: Big Data to Critical Behavior

- **What is a ‘Critical Behavior’ or ‘Key Performance Behavior’?**
 - Asking for Sale - Create Urgency - Response Rate (C2C) - Solution Provided
 - Discovery - Effective Pitch - Transfer Rate
- **Why is Critical Behavior Adherence important?**
 - Critical Behaviors directly impact the successful outcome of the interaction



Q1: KPB Index – Why Does This Matter?



Overall Program QA Score

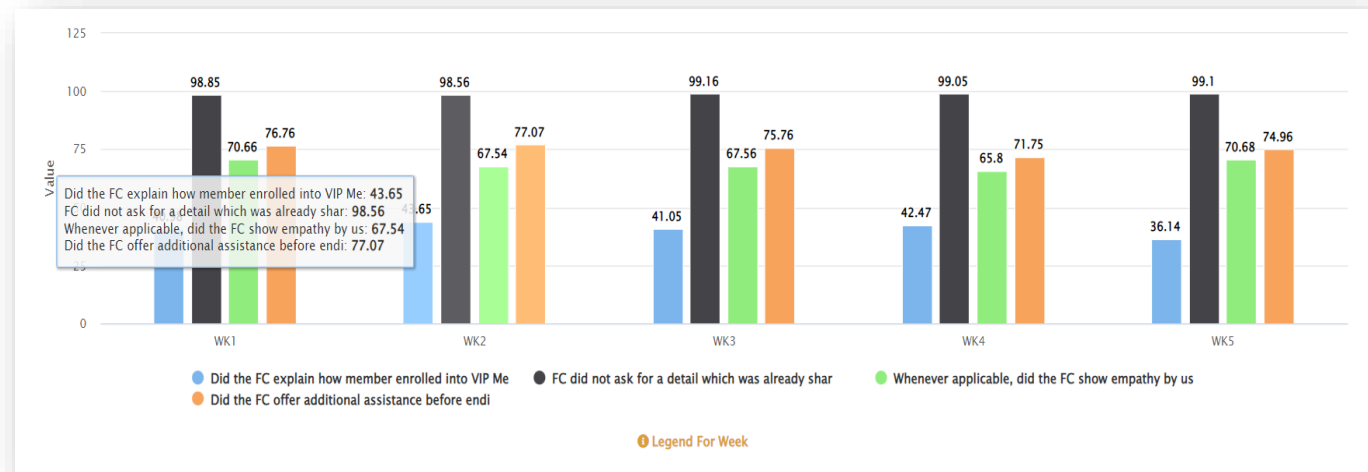
Date Type :-Evaluation Date **Date Range** : 09/01/2022 To 09/30/2022 **Total Evaluation** : 49914
Client Name : Etech Wireless **Evaluation Form** : 01. Voice Automated Audit V1.0 **Autofailure Evaluation** : 36838
Program : Voice Automated Audit V1.0 **Location** : Texas **Sub Program** : ALL
Agent Name : ALL **Supervisor Name** : ALL **Partner Name** : ALL

	Maximum Points	Total Possible Point	Total Scored	Performance (%)	Performance Bar	Status
GREETING						
Did the FC use correct brand name and identify himself/herself?	1.00	49913	44046.5	88.25%	<div style="width: 88.25%;"></div>	●
Section Average		49913	44046.5	88.25%	<div style="width: 88.25%;"></div>	●
CONCERN						
Did the FC ask how they maybe of assistance today (if reason was not previously shared)	1.00	49913	47290.5	94.75%	<div style="width: 94.75%;"></div>	●
Did the FC acknowledge/reassure the member that their needs will be met?	1.00	49913	32689.5	65.49%	<div style="width: 65.49%;"></div>	●
Section Average		99826	79980	80.12%	<div style="width: 80.12%;"></div>	●
RETENTION						
If not shared already, did the FC ask the reason for cancellation? (Member Experience Alert)	2.00	49610	40233	81.1%	<div style="width: 81.1%;"></div>	●
Did the FC present any Save Attempt? (Critical Business Requirement Alert)	3.00	149739	30237	20.19%	<div style="width: 20.19%;"></div>	●
Was the Save Attempt relevant to the reason for cancellation? (Member Experience Alert)	2.00	43774	19523	44.6%	<div style="width: 44.6%;"></div>	●
Refund of Member Credit was not offered without giving any Save Attempt to retain the member. (Business Requirement Alert)	2.00	49610	49542	99.86%	<div style="width: 99.86%;"></div>	●
Section Average		292733	139535	47.67%	<div style="width: 47.67%;"></div>	●
RESOLUTION DETAILS						
Did the FC explain how member enrolled into VIP Membership? (Member Experience Alert)	1.00	5331	2213	41.51%	<div style="width: 41.51%;"></div>	●
Did the FC explain how member can utilize the member credit?	1.00	5330	2380.5	44.66%	<div style="width: 44.66%;"></div>	●
Whenever shared, was the correct time frame of skipping shared?	2.00	32840	16775	51.08%	<div style="width: 51.08%;"></div>	●
If applicable, did the FC completely inform about earning credits by referring a friend? (per the policies of BU)	1.00	2943	2317	78.73%	<div style="width: 78.73%;"></div>	●
Did the FC explain the different tiers for redeeming RPs?	1.00	33	16.5	50%	<div style="width: 50%;"></div>	●
If Grace Skip provided, did the FC set clear expectation that the account is being skipped as a gesture of goodwill and that member will have to skip the next months between first 5 days?	3.00	264	226.5	85.8%	<div style="width: 85.8%;"></div>	●
Section Average		46741	23928.5	51.19%	<div style="width: 51.19%;"></div>	●
CONVERSATION						
Whenever applicable, did the FC show empathy by using empathetic/sympathetic words? (Member Experience Alert)	3.00	66270	45015	67.93%	<div style="width: 67.93%;"></div>	●
FC did not ask for a detail which was already shared by the member previously. (Member Experience Alert)	2.00	99826	98777	98.95%	<div style="width: 98.95%;"></div>	●
FC never behaved/talked in an unprofessional manner? (Member Experience Alert)	3.00	149739	149199	99.64%	<div style="width: 99.64%;"></div>	●
Did the FC thank/apologize the member for being on hold?	2.00	16308	13472	82.61%	<div style="width: 82.61%;"></div>	●
Did the FC avoid dead air in the call?	1.00	49913	45183	90.52%	<div style="width: 90.52%;"></div>	●
Section Average		382056	351646	92.04%	<div style="width: 92.04%;"></div>	●
CLOSING						
Did the FC offer additional assistance before ending the call?	1.00	49913	37472	75.07%	<div style="width: 75.07%;"></div>	●
Section Average		49913	37472	75.07%	<div style="width: 75.07%;"></div>	●
QA Score Without Auto Failure		921182	676608	73.45%	<div style="width: 73.45%;"></div>	●
QA Scores With Auto Failure				19.67%	<div style="width: 19.67%;"></div>	●

KPB Dashboard



Critical Parameters



Q: I like the idea of using “big data” to get a directional map of performance at scale. How do I get my team to use it?



A: Make it simple, easy to apply, show the potential outcome and inspect effectiveness of coaching. Rinse and Repeat.

Q2: Who to Coach?



Consultant	Team Leader	Total Interactions	Ask for Sale		Cross Sell Insurance		Quality Score		Coaching Effective Rating
			Target	Total Opportunities	Target	Total Opportunities	Target	Overall QA Score	
Roman Marcinek	Malgorzata	76	< 10%	5%	< 12%	10%	> 85%	97%	A
Arun Jose V	Sana	90	< 10%	5%	< 12%	10%	> 85%	95%	A
Syed Hyder	Sagar	90	< 10%	6%	< 12%	11%	> 85%	94%	A
Manu Naik	Irfan	90	< 10%	5%	< 12%	10%	> 85%	93%	A
Ganesh	Malgorzata	93	< 10%	6%	< 12%	11%	> 85%	91%	A
Tan Yu Xiu	Min Yu	84	< 10%	5%	< 12%	10%	> 85%	90%	A
Vishnu Prasadh	Ajith	89	< 10%	5%	< 12%	10%	> 85%	90%	A
Subhrajyoti Sarkar	Ajith	95	< 10%	5%	< 12%	10%	> 85%	89%	A
Nikhil Kumar	Sagar	99	< 10%	5%	< 12%	10%	> 85%	88%	A
Vedant Bais	Sagar	99	< 10%	6%	< 12%	11%	> 85%	85%	A
Veena Rao	Sana	97	< 10%	6%	< 12%	11%	> 85%	84%	B
Carlos Lopez	Jose	95	< 10%	6%	< 12%	11%	> 85%	83%	B
Barb Allman	Jason	89	< 10%	6%	< 12%	11%	> 85%	79%	B
Subhan Ali	Sagar	121	< 10%	7%	< 12%	12%	> 85%	77%	B
Allwin James	Binil	109	< 10%	8%	< 12%	13%	> 85%	76%	B
Michelle Wen	Sarah Hu	116	< 10%	8%	< 12%	13%	> 85%	76%	B
Tonny van Schijndel	Simon	56	< 10%	7%	< 12%	12%	> 85%	75%	B
Jagan Mohan	Irfan	77	< 10%	9%	< 12%	14%	> 85%	72%	C
Vibha Kishore	Ajith	135	< 10%	13%	< 12%	18%	> 85%	71%	C
P Rakshith	Sana	65	< 10%	10%	< 12%	15%	> 85%	68%	C
Shashank Gaddagi	Sagar	82	< 10%	10%	< 12%	15%	> 85%	68%	C
Adithya M	Binil	101	< 10%	9%	< 12%	14%	> 85%	67%	C
Swaroop M	Sana	49	< 10%	9%	< 12%	14%	> 85%	65%	C
Shanker Nambisan	Sana	97	< 10%	28%	< 12%	33%	> 85%	64%	C
Neeraj MM	Sana	88	< 10%	18%	< 12%	23%	> 85%	63%	C

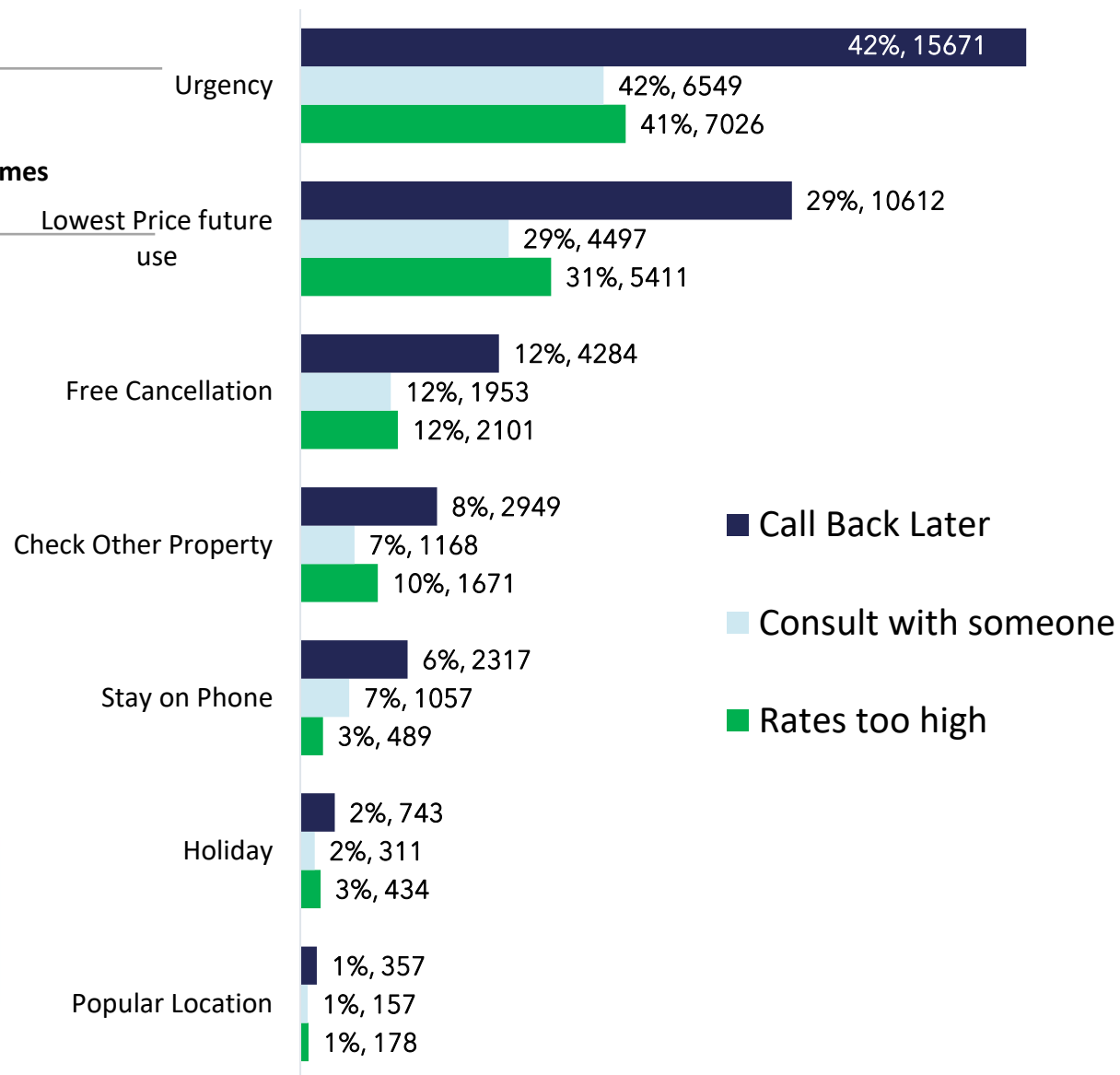
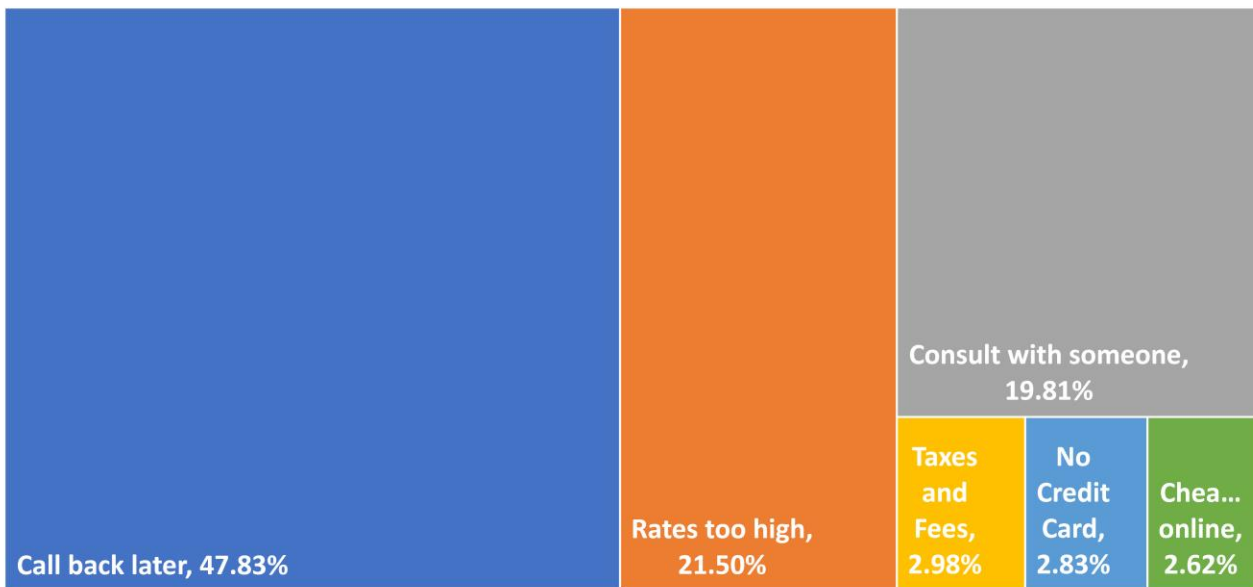
Q2: What to Coach?

Creating Urgency functioned as a **successful rebuttal** for the top 3 objections

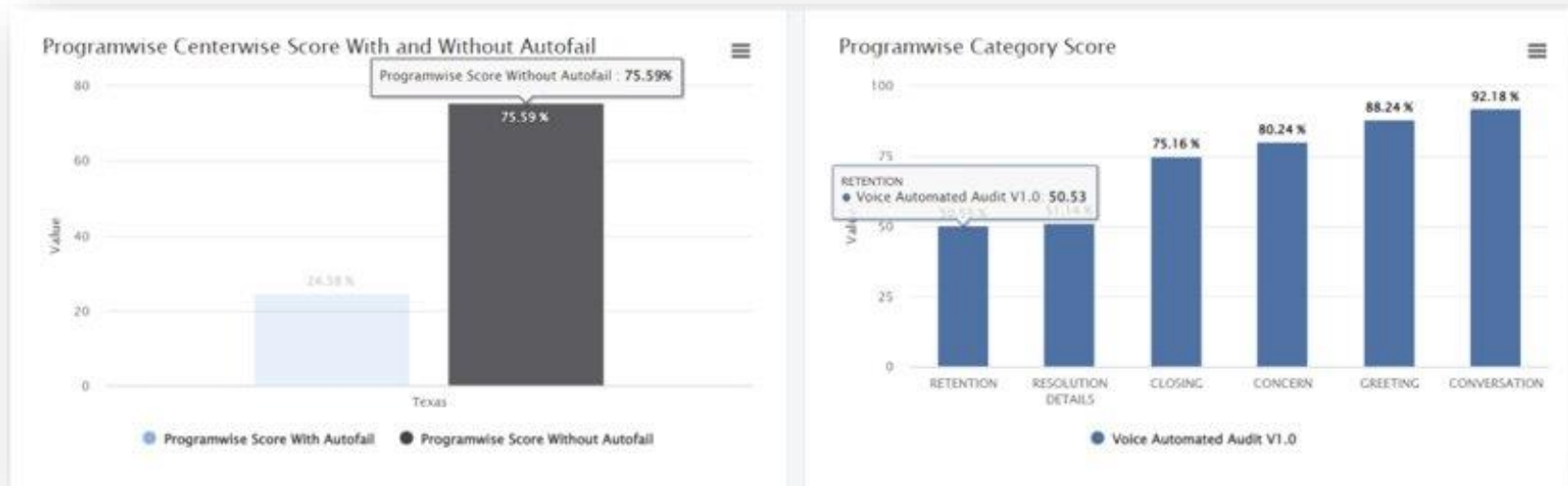
Lowest price rebuttal was **successful 31%** of the times when customers objected about the rates



Major Objections



Q2: Use Your Tools



01. Voice Automated Audit V1.0

N/A
 Gets it
 Getting it
 Needs Improvement

*Did the FC acknowledge/reassure the member that their needs will be met?

N/A
 Gets it
 Getting it
 Needs Improvement

RETENTION

*If not shared already, did the FC ask the reason for cancellation? (Member)

N/A
 Gets it
 Getting it
 Needs Improvement

*Did the FC present any Save Attempt? (Critical Business Requirement All)

Pending

N/A
 Gets it
 Getting it
 Needs Improvement

Training Guideline

Content
FC present any Save Attempt

Gevel/M Level: integration

M Level training missions:
third party objection: <https://login.milevel.com/a/2a08c42e-bec0-4d78-843e-35263f31f48>
handle customers objection: <https://login.milevel.com/a/0e29c484-6a42-4f6a-af20-3ad6fca973b>

Documents
2 275_44826_912014711_Agent and Supervisor Basic Guidelines.pdf

Electronic Signature Name

Electronic Signature Date

Submit

Q2: Inspection & Insight – Coaching Effectiveness



Etech Wireless

01. Voice Automated Audit V1.0

Supervisor Name	Total Evaluation	Total Reviewed	Coach Reviewed	Self Reviewed	Coaching Rating	QA Score
Anne Sophie	4346	4346	2054	2292	4.0	76.24%
David Klein	570	570	270	300	4.2	74.65%
Leo Dangallo	30119	30118	14670	15448	3.8	73.68%
Lupe Hernandez	5932	5932	2897	3035	3.7	75.43%
Melissa Wood	1031	1031	470	561	3.3	74.19%
Michelle HarperS	7899	7898	3895	4003	3.7	75.25%

Service Quality V1.0

Supervisor Name	Total Evaluation	Total Reviewed	Coach Reviewed	Self Reviewed	Coaching Rating	QA Score
Anne Sophie	30	2	0	2	0.0	76.67%

Question: 3

Q: You've talked a lot about performance management of people. What about business insights? What are some examples of strategic business intel that can be derived from your process?

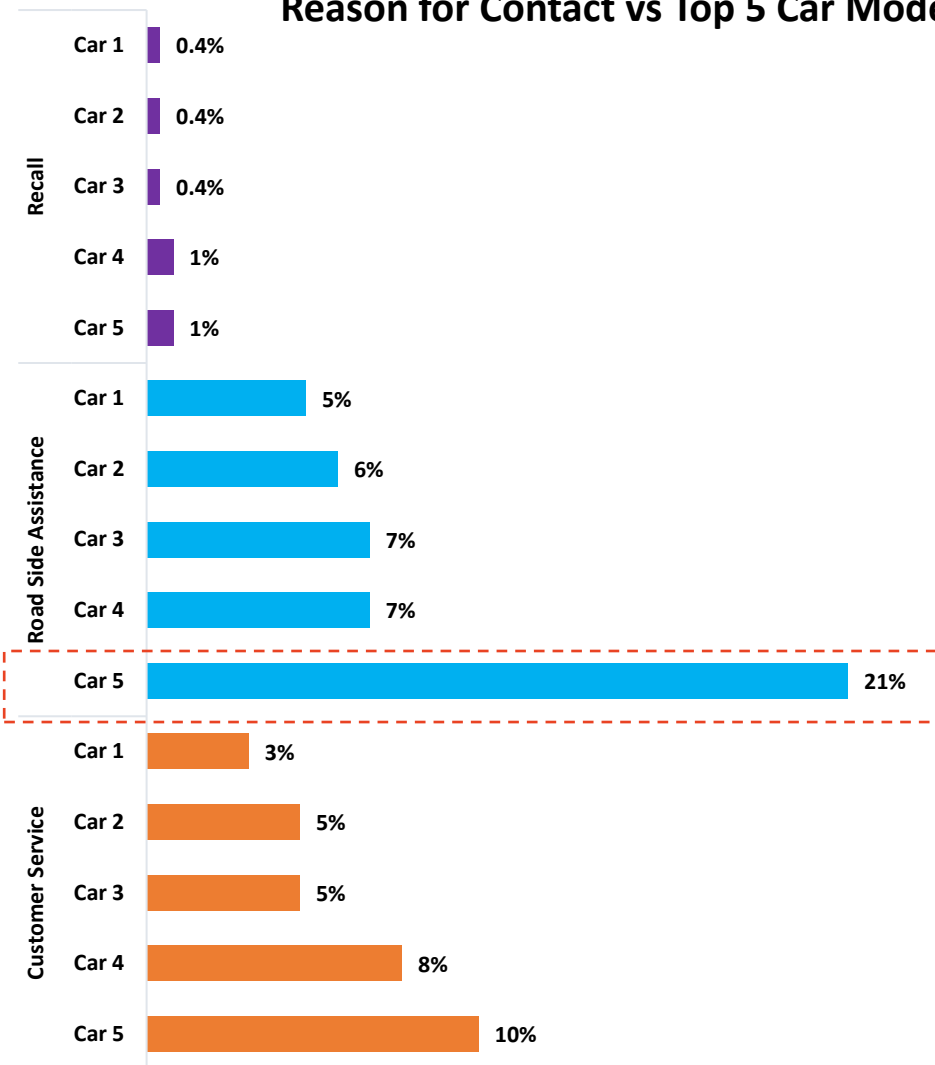


A: Your imagination is the only limit to what can be discovered when mining business insights.

Q3: Reason of Contact - Product Wise Breakdown



Reason for Contact vs Top 5 Car Models





12910 calls



Total Order Status Inquiry Interactions

270 Calls
(2.09%)

From the total volume of 12910 calls

Volume breakout with Months



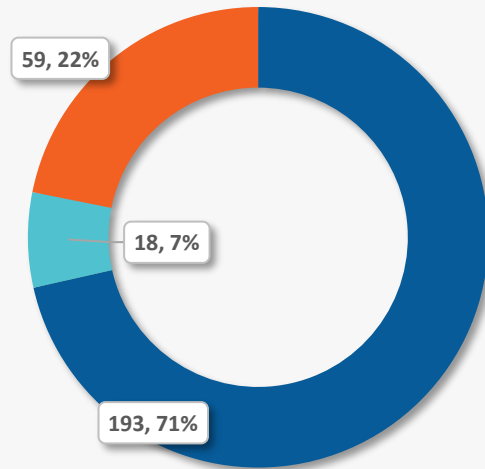
Month	Total Volume	Order Status Calls	Order Status % Calls
JAN - 22	88	1	1.14%
FEB - 22	1493	29	1.94%
MAR - 22	4963	95	1.91%
APR - 22	6366	145	2.28%

A total of 12910 calls were ingested in our AI application starting 31st Jan till 20th Apr 2022. Etech Insights analysts went ahead and created a category to capture interactions in which customers are inquiring on Order Status. Identified 270 under the category: Order Status Inquiry; which is 2.09% of calls from the total volume

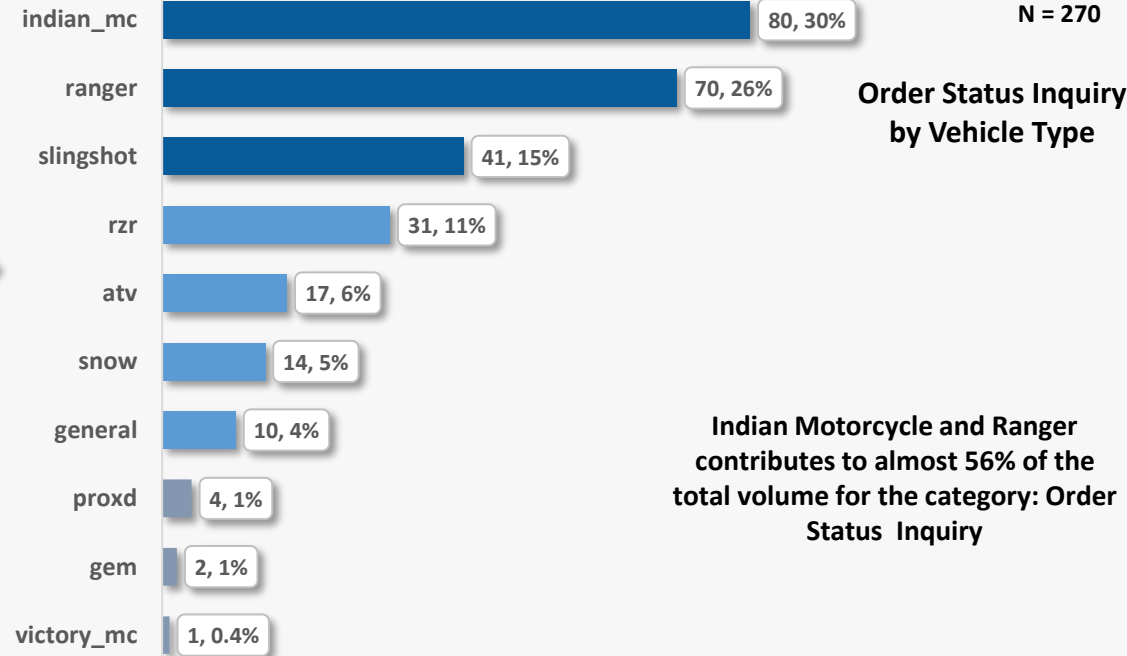
N = 270

Order Status Inquiry by Case Type

- New Case Created
- No Case Needed
- Update existing Case



New Cases were created for the majority of the interactions identified under the category: Order Status (193 calls out of 270) followed by 59 calls with existing cases generated



Indian Motorcycle and Ranger contributes to almost 56% of the total volume for the category: Order Status Inquiry

Question: 4

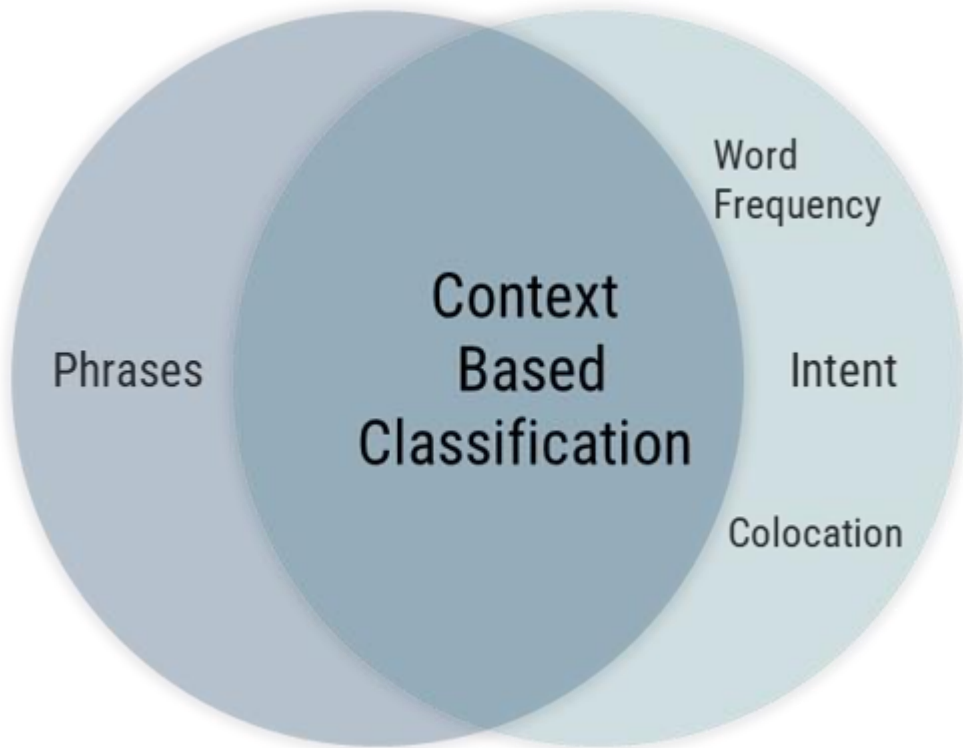
My company tried using Joe's Speech Analytics platform. The words were transcribed incorrectly, I can't hold my people accountable to this and it just looks wrong. How do I know the information I'm giving my people is accurate?

A: Contextual analysis, phrase capture/correction, aggressive testing, and constant tuning

Question: 4

How do we train the Engine?

We use context-based classification to ensure optimum accuracy as opposed to plugging in keywords



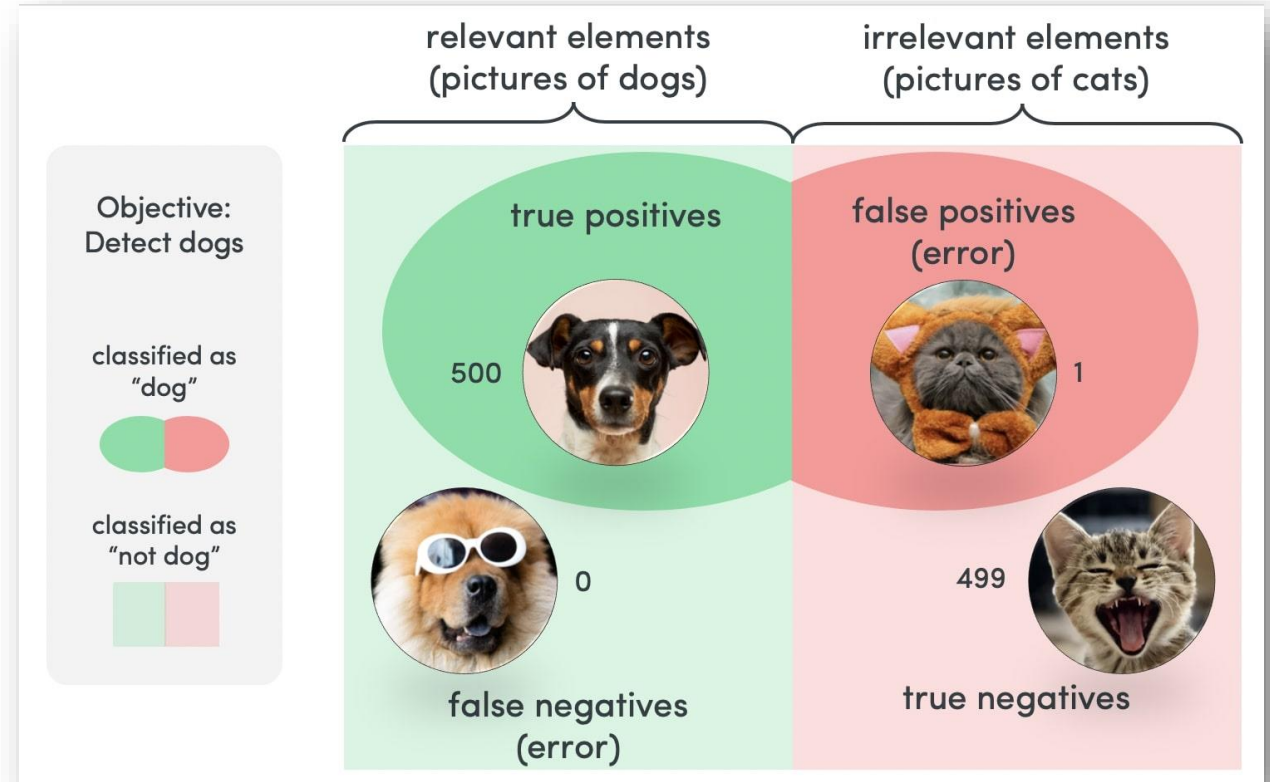
How do we ensure Accuracy?

Accuracy

Accuracy Analysis – AA : Stratified sample of 100 Calls for Each categories is evaluated to ensure we score above 85% on the accuracy

Recall

Other Bucket Analysis is performed using the same methodology to ensure optimum recall and < 5% other bucket



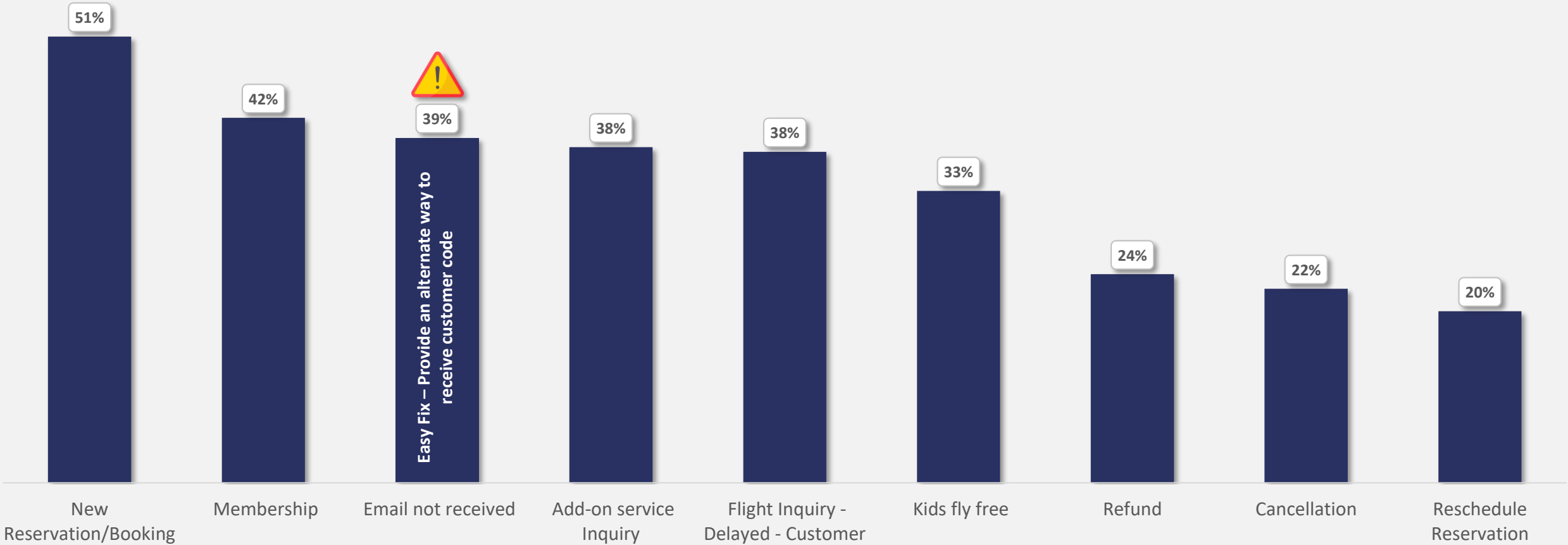
Q: How quickly can you produce data?



A: Within days we can provide surface data, within 30 days, fully fitted, in depth, analyzed full population output.

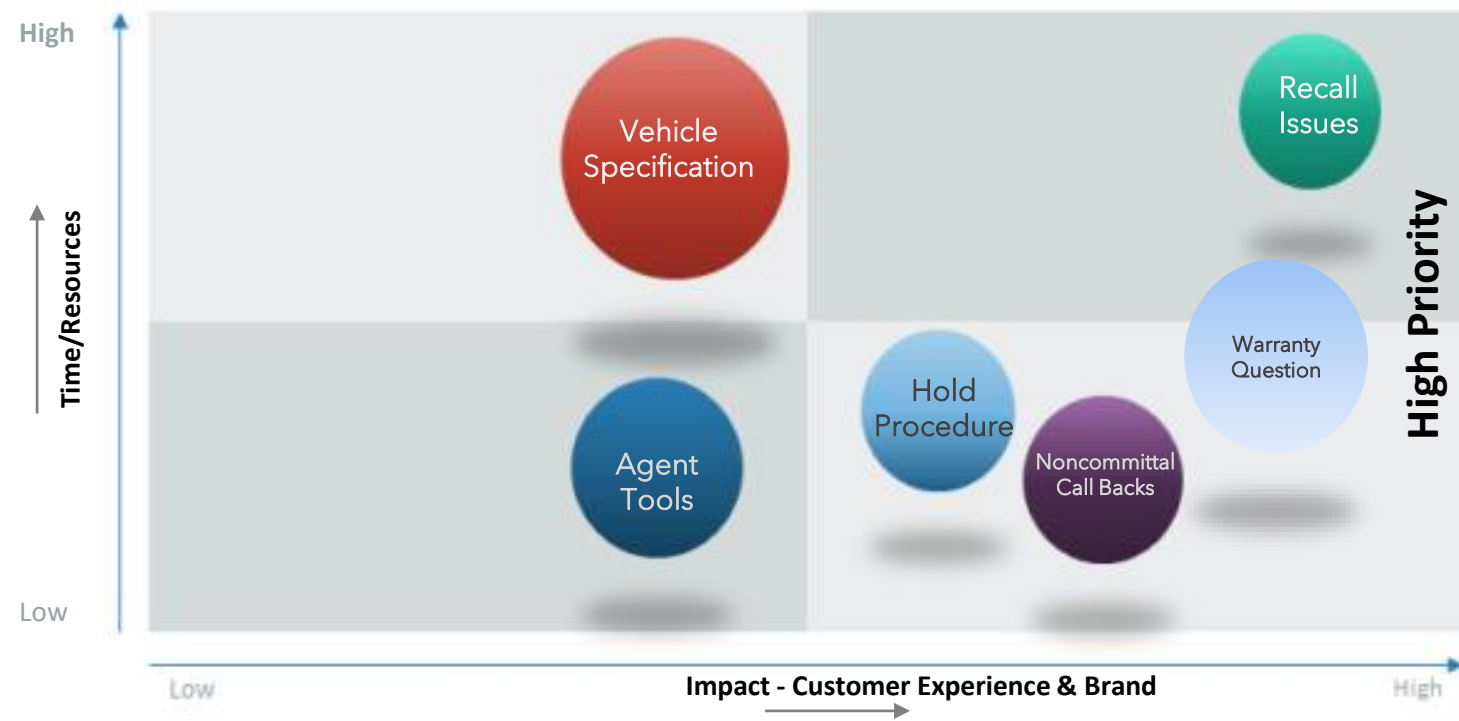
Q5: 14-Day Surface Data Example

Customer Effort was very high while making a new reservation or booking. This included customers switching channels



- Customers are calling because they did not receive the confirmation email
- “I never got a confirmation e-mail saying the changes that were made today by one of your fellow agents”

Q5: Recommendation Model to Improve CX



How to achieve it?

- 1 Effective Hold Techniques:**
 - Explain the reason why you are putting them on hold
 - Set the right expectation of the time it will take
 - Ask for their permission
 - Come back and refresh the call if you think it is taking longer than promised
 - Job aids on the floor and quick discussion around the hold technique will help the agents master this behavior
- 2 Noncommittal Call Backs:**
 - Design and Train agents on call back protocols. Coach agents to mention a specific timeline every time they promise a call back to the customer
 - This is an easy fix. Providing Job Aids with a predetermined call flow will have a more significant impact towards correcting this behavior
- 3 Warranty Question:**
 - If a customer has questions about their vehicle's warranty, and dealerships are not able to answer them, they expect the frontline agents to have an answer. Not having an answer to a warranty question, creates confusion and increases customer effort exponentially
 - Etech recommends training agents on the basics and giving them access to a database that can function as a guiding light when customers ask questions about the warranty or extended warranty
 - Updating this information in the Mobile app based on the vehicle the users own will reduce the number of calls coming in for this and help lower the call volume
- 4 Recall Issues:**
 - Design a training session around the recall issues you have been hearing the most on the calls. Although a high effort fix
 - This will enable the agents to assist the customer who comes in for questions about recall issues and decreases customer effort

Johari Window Model

- The matrix above can help us make training decisions based on the impact and resources involved in developing or correcting a behavior
- As you move to the right, the impact of that action on customer experience increases. The higher it is in the matrix, the higher time and resources you will need to achieve the goal

Converting 50% of the Negative VOC into Positive will increase the NPS by 25.
Improved NPS: 17

Lets Recap

Q: How do we get out of the checkbox mentality?
This has been the standard of our industry forever.



A: Understand directional scale. Apply KPB Indexing and focus on critical behaviors.

Q: I like the idea of using “big data” to get a directional map of performance at scale. How do I get my team to use it?



A: Make it simple, easy to apply, show the potential outcome and inspect effectiveness of coaching. Rinse and Repeat.

Q: You’ve talked a lot about performance management of people. What about business insights? What are some examples of strategic business intel that can be derived from your process?



Your imagination is the only limit to what can be discovered when mining business insights.

My company tried using Joe’s Speech Analytics platform. The words were transcribed incorrectly, I can’t hold my people accountable to this and it just looks wrong. How do I know the information I’m giving my people is accurate?



A: Contextual analysis, phrase capture/correction, aggressive testing, and constant tuning.

Q: How quickly can you produce data?



A: Within days we can provide surface data, within 30 days, fully fitted, in depth, analyzed full population output.

Enabled. Empowered. Excellent. Effortless.



- Data at scale is fair & balanced – avoid gauging an individual’s value based on a microcosm of their universe
- Make it effortless for agents to apply the optimal behaviors with practical examples that work at scale
- Quiet quitting? Only going to do the bare minimum? Enable the quiet quitters with the most effective bare minimum and let them shine without trying.
- Agility – proactively understand hot spots or problem areas, in near real time. Understand what’s working and how to replicate – quickly and accurately
- Retention – Confidence and expertise are built quickly, creating brand experts who are comfortable in their roles and stick with their job



The Impact - Customer Speaks

Chris Basile

Vice President – Call Center Operations

Chris oversees revenue growth, successful onboarding, ongoing adoption, and the overall success and support of Phone.com customers.

Chris brings over 20 years of experience with specialization in employee engagement, workforce optimization, and leadership development. He holds a BA in Business Management from California Coast University.



The Impact



Chat Abandonment

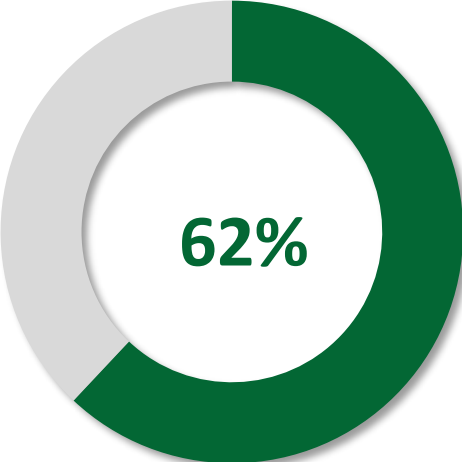
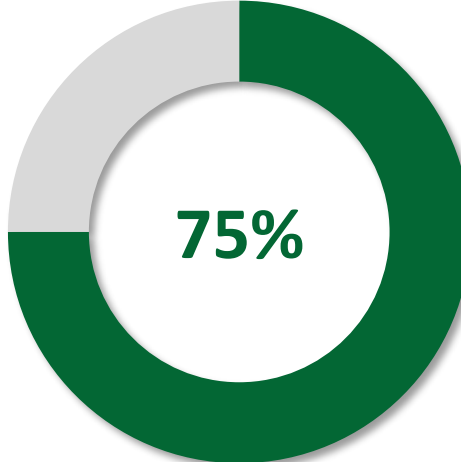


Before	After
<ul style="list-style-type: none">Over 60% abandoned chats	<ul style="list-style-type: none">During first 60 days, the number went down to 7.9%In the next 30 days, the number further went down to 1.14%

With 10 Days, where not even 1 chat was lost.

Overall VOC Index



When Started	After 2 Months
 <p>62%</p>	 <p>75%</p>

Overall VOC index scores **increased by 13% in just 60 Days of Launch**

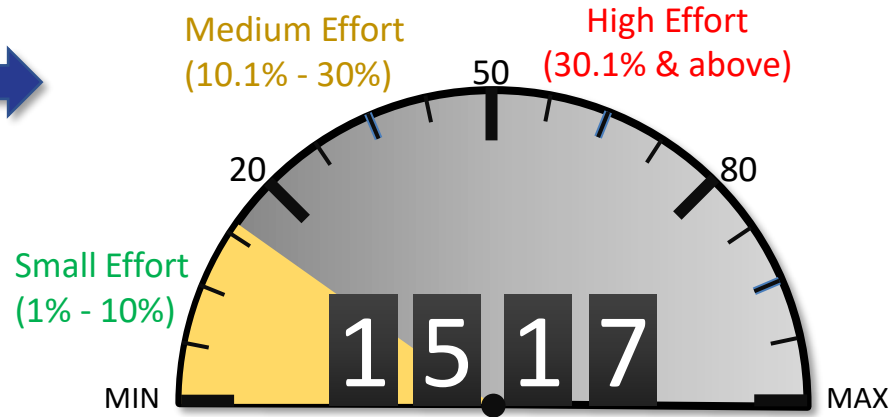
The Impact

Customer Effort

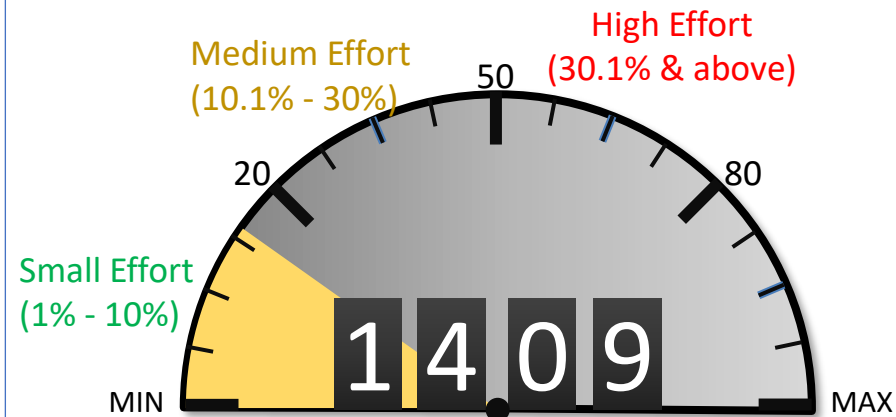
- Overall Customer Effort Score reduced by 1.08%.
- Similarly, we can see the decrease in all the customer effort drivers



When Started



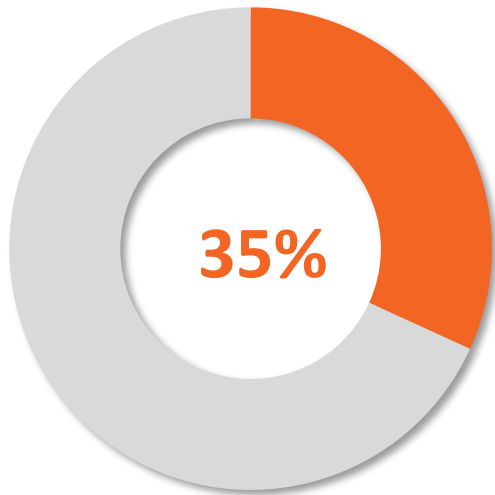
After 2 Months



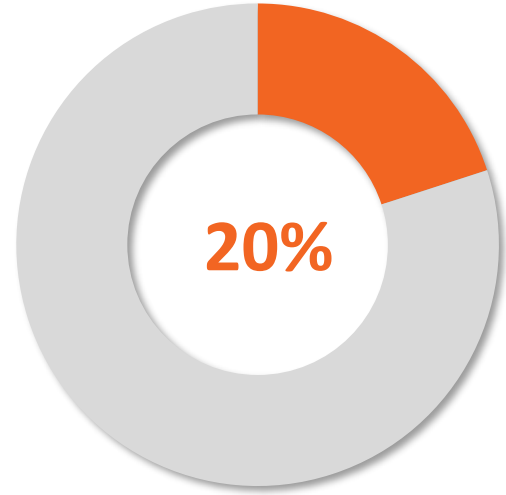
When Started

Agent Effort

- Overall, Agent Effort scores decreased by 15% from the launch



After 2 Months



The Impact - What a difference a year can make!

2022 – Before Etech

- Average Abandon Time: 8:52 (M/S)
- Longest Wait Time: 43:35 (M/S)
- Average Wait Time: 5:53 (M/S)
- Total Wait Time: 106:58 (Hours)
- Service Level: 29.7%



2023 – After Etech

- Average Abandon Time: 6 Seconds
- Longest Wait Time: 11:04
- Average Wait Time: 21 Seconds
- Total Wait Time: 5:03 (Hours)
- Service Level: 88.1%



Tenacity: [tuh-nas-i-tee] *noun*

- The quality of being very determined
- Persistent forward momentum with a game plan
- To never stop trying to achieve a goal even in the face of seemingly insurmountable odds



THE BIG THING: Improving Employee Retention



Targeted coaching & training



Move beyond quality scores, provide direct feedback for improvement



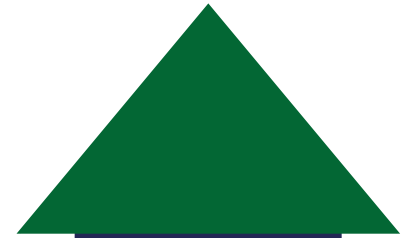
Benchmark performance with KPIs



Involve agents in the evaluation process



Encourage Self-Learning



Great, This Makes Sense as a Leader, Now How do I Convince Everyone?



Reduce the amount of time it takes you to become a commissioned team member

You're in control

Understand what to say and when to say it. When it's most likely to appeal to the customer

Reduce the mental effort to become "good" at your job – learn faster with less "trial and error"

Fair and Balanced – Your ability is not gauged on a small proportion of your work

A blurred background image of a business meeting. In the foreground, a person's hand is writing on a clipboard with a pen. To the right, another person is holding a tablet displaying various data visualizations, including a network diagram with colored nodes and a line graph with a red arrow pointing upwards. The overall scene is dimly lit with a blue tint.

**So – What did we
Learn Today?**

Building a Data-Influenced Work Culture





- You need **FUNCTIONAL** expertise, and AI expertise to turn your insights, Actionable.
- Complex challenges **are not Reporting**.
This is focused Insight Delivery. This is Descriptive and Diagnostic Analytics
- Complex and **bad data destroys the integrity**, introduces risk and promotes bad/inaccurate decision making
- Does your **data tell a story**, is it consumable and usable at every level of organization?



- Preventing blind spots that leads to **Silo Reporting**
- Data models with very specific **customizable metadata** equals surgical output.
- Translating the data in an **intuitive, easy to use and understand UI format, visualization that is easy to access and Actionable.**

Don't Coach the Call, Coach the Skill



Goal Setting
Set objectives and goals for the entire organization

Analyzing Data
Analyze your data & establish baseline measurements

Prioritizing ROI
Prioritize your initiatives based on their ROI

Read detailed blog



Awareness
Empower your teams by creating awareness about speech analytics

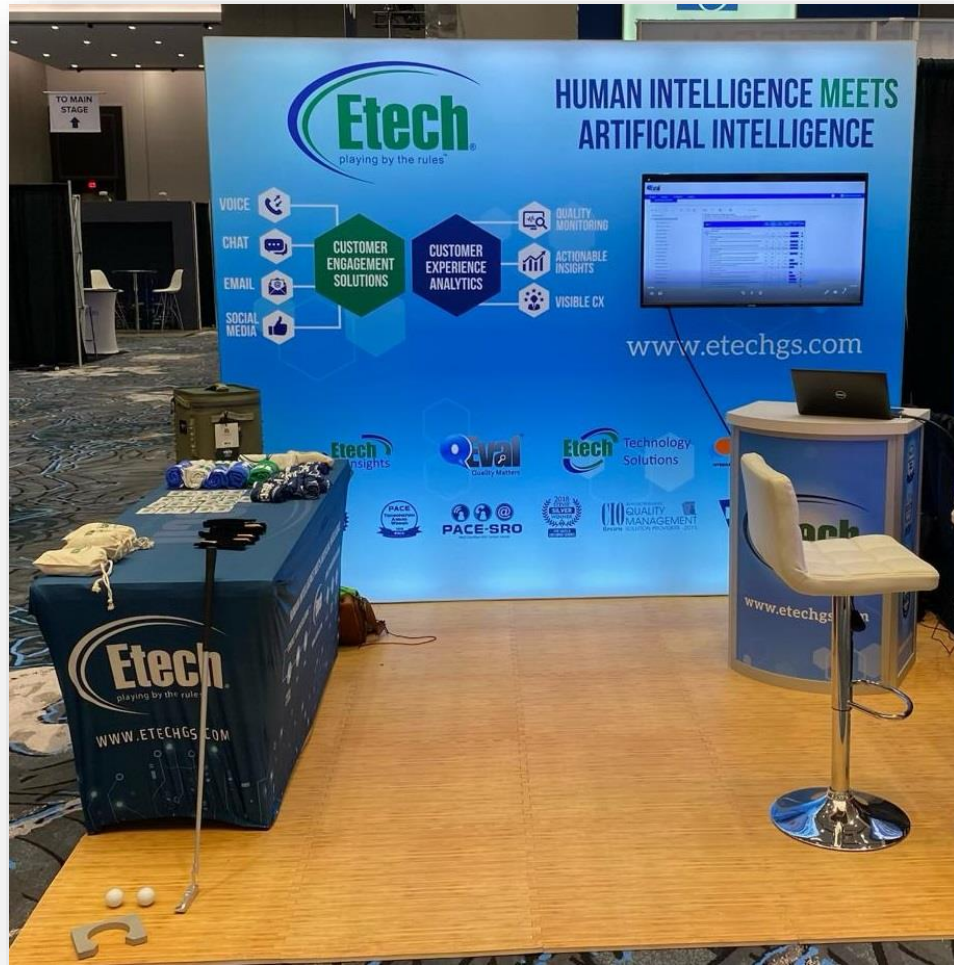
Plan of Action
Develop a plan of action to put your findings to use across the organization

Cross-Functional Collaboration
Ensure collaboration across the enterprise

Subscribe to Jim's Newsletter



Visit Our Booth #408



info@etechgs.com



etechgs.com/info

Ask The Experts



Jim Iyooob
Chief Customer Officer
Etech Global Services
jim.iyooob@etechgs.com



Chris Basile
VP – Call Center Operations
Phone.com
cbasile@phone.com



Shawndra Tobias
Vice President - CX
Etech Global Services
shawndra.tobias@etehtexas.com

