



Speakers:

Jim Iyooob - Chief Customer Officer, Etech

Shawndra Tobias - VP – CX, Etech

Robert Beasley – Chief Executive Officer, Tethr

Brian Hurley – Chief Executive Officer, Vaspian

Etech Webinar | February 16 2022

Reshaping Customer and Agent Experience

**With Integrated Speech
Analytics**

Meet our speakers for today



Jim Iyoo

Chief Customer Officer,
Etech



Shawndra Tobias

VP – Customer Experience,
Etech



Robert Beasley

Chief Executive Officer,
Tethr



Brian Hurley

Chief Executive Officer,
Vaspian



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



1

Importance of AI + HI

For Improving Contact Center Performance & CX

2

Data in Real Life

- Business Challenges, Use Cases, Measuring ROI
- Case Study
- Why is Coaching Crucial?

3

How to successfully implement the right technology?

Key Challenges, Revenue Impact, Selecting the right solution provider

What is Artificial Intelligence?

- Kills jobs
- Replaces humans
- Manages tasks
- “AI will solve everything”



What people
think AI does!



What AI
actually does!

- Uncovers hidden insights
- Upskills team members
- Empowers management for strategic decisions
- Provides predictions based on past behavior

AI is transformative, but it won't happen overnight

Brenda Tent retired from living at the age of old, surrounded by family and natural causes. A librarian from birth, Brenda was an avid collector of dust. She had a sweet heart and married her high school. She loved having hobbies and helping her sons to be disadvantaged youths. She had no horses but thought she did. The church gave her a choir because she sang like bird and looked like bird and Brenda was a bird. She owed us so many poems.



The funeral will be held in 1977 at heaven. In lieu of flowers, send Brenda more life.

 **Alistair Croll** ✓
@acroll

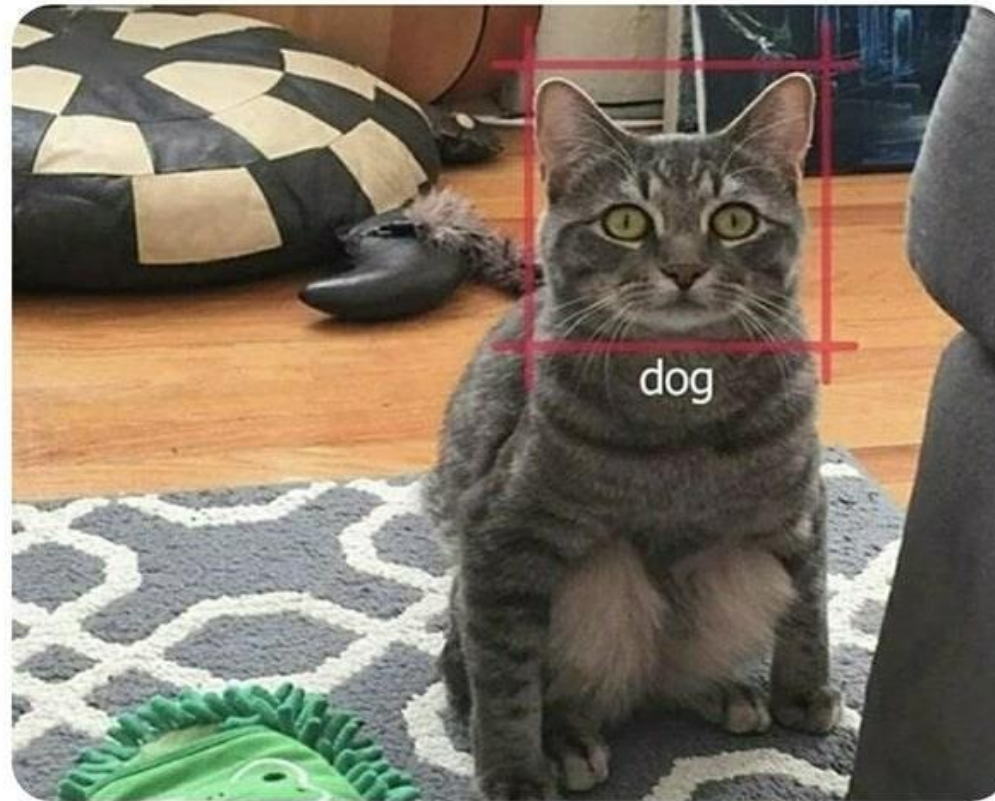
This is the best metaphor for machine learning I have ever seen.

 **spencer** @Ssssnakepit · Nov 12
first time completing a puzzle this is very easy



90's Media: AI WILL DESTROY
THE WORLD IN A DECADE

That AI today:



“AI & CX is a luxury – I don’t need it”

Those Who Adapt:

- Insights to **improve performance**
 - Reasons for customer dissatisfaction
 - Identify CX Drivers
- Improve **sales conversions**
- Real-time risk monitoring
 - 360° Compliance Tracking
- Automate mundane tasks

The Cost of Late Adoption:



*The price of doing the same old thing is far higher than the price of change.”
- Bill Clinton, Former US President*

Cost Reduction:

- Automated Compliance Monitoring
- Avoid non-compliance regulatory fines
- Reducing Call Volume, by identifying customer's reason for call
- Eliminate unnecessary call backs by improving FCR
- Upgrading the self-service through website and intelligently using IVR programs
- Reduce transfers and time spent on each call
- Reduced training turnover cost



Revenue Increases:

- Sales from increased call-conversion rates
- Higher debt collection ratios
- Vastly improved customer service evaluations
- Swifter response to competitive influences
- Reduced customer churn

Beyond The Scorecard & Check Box, Real Automation, CX Focus



AI



Etech®

playing by the rules™

27%

54%





Shawndra Tobias

VP – Customer Experience

A Call Center industry expert with over 25 years of experience in improving call center operations, managing & monitoring system performance, process improvement and quality assurance programs.



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- IOT
- Who's Teaching this Thing?
 - YOU are!
- Accuracy
- AI Vs HI
 - Both can be wrong, but we are more forgiving of humans. We expect perfection from a machine because we are most familiar with functional machines that perform a repetitive set of functions or just one function
 - AI is a “thinking” machine along with having functional properties powered by machine learning.
 - Anything – human or machine - that “thinks” and “learns” is subject to inaccuracy while learning.
- Is AI dangerous?
 - Ummm, no.
 - Humans, however...



Natural Language Processing

- 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.**

good See definition of *good* on Dictionary.com

adj. pleasant, fine | adj. moral, virtuous | adj. competent, skilled | adj. useful, adequate | adj. reliable; untainted

SYNONYMS FOR *good* ⓘ

Compare Synonyms

- | | | | | |
|-------------|-----------|----------|-------------|-----------|
| acceptable | wonderful | rad | congenial | reputable |
| excellent | ace | sound | deluxe | select |
| exceptional | bad | spanking | first-class | shipshape |
| favorable | boss | sterling | first-rate | splendid |
| great | | | | |
| marvel | | | | |
| positive | | | | |
| satisfac | | | | |
| satisfyi | | | | |
| superb | | | | |
| valuabl | | | | |

good See definition of *good* on Dictionary.com

adj. t, fine | adj. moral, virtuous | adj. competent, skilled | adj. useful, adequate | adj. reliable; untainted | adj. kind, g

SYNONYMS FOR *good* ⓘ

Compare Synonyms

- | | | | | |
|-------------|------------|-----------|-----------------|--------------|
| honest | worthy | ethical | irreprehensible | reputable |
| respectable | admirable | exemplary | irreproachable | righteous |
| innocent | blameless | guiltless | lily-white | tractable |
| | charitable | honorable | obedient | uncorrupted |
| | dutiful | interrupt | praiseworthy | untainted |
| | salutary | virtuous | pure | well-behaved |

good See definition of *good* on Dictionary.com

adj. skilled | adj. useful, adequate | adj. reliable; untainted | adj. kind, g

SYNONYMS FOR *good* ⓘ

Compare Synonyms

- | | | | | |
|--------------|-------------|------------|-------------|-----------------|
| acceptable | helpful | fitting | conformable | seemly |
| advantageous | profitable | meet | congruous | serviceable |
| appropriate | proper | right | favoring | tolerable |
| beneficial | respectable | all right | healthful | toward |
| convenient | satisfying | ample | hygienic | unobjectionable |
| decent | suitable | apt | needed | wholesome |
| desirable | approving | auspicious | benefic | opportune |
| favorable | brave | becoming | propitious | |
| fruitful | common | benignant | | |
| healthy | fit | | | |

See also synonyms for: **best / better / goods**

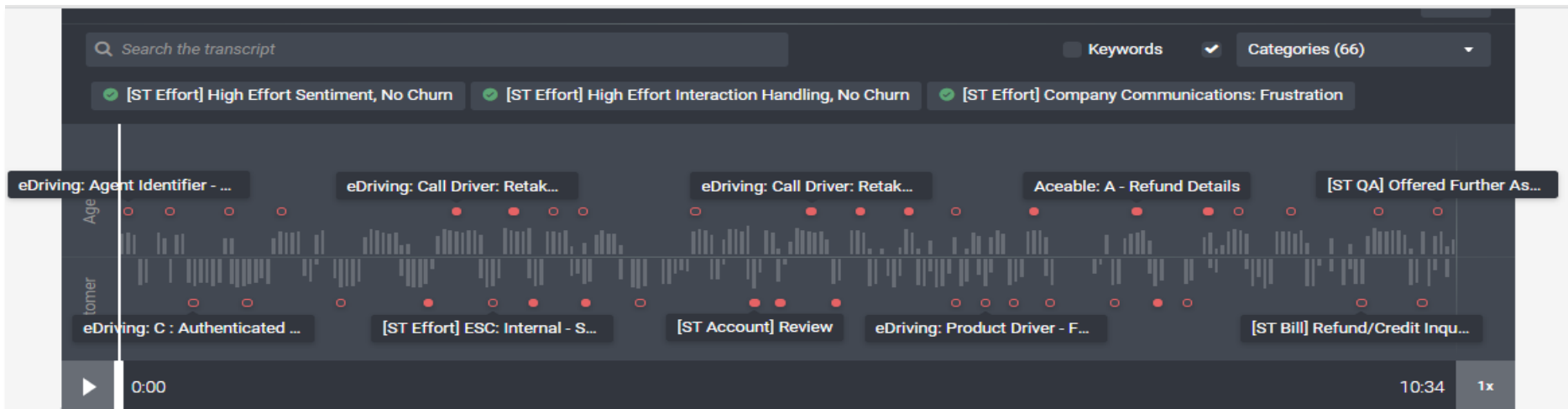
SYNONYMS FOR *good* ⓘ

Compare Synonyms

- | | | | | |
|--------------|----------|--------------|-------------|-------------|
| able | suitable | accomplished | dexterous | skillful |
| efficient | talented | adroit | first-rate | suited |
| proper | useful | au fait | proficient | thorough |
| reliable | adept | capable | qualified | trustworthy |
| satisfactory | expert | clever | serviceable | |

See also synonyms for: **best / better / goods**

370 Synonyms for the word 'GOOD'



Transcript | My notes | Comments

Only show interaction events

- ▶ **Agent 0:02** (eDriving: Agent Identifier - Agent, Aceable: Agent Identifier - Agent, Aceable: Greeting- Agent Introduction, Aceable: Greetings- Opening -Thanking the customer, Aceable: A - Email verification, [ST QA] Greeting, [ST QA] Agent Name, [ST QA] Acquire - Name, [ST QA] Acquire - Email)
thank you for calling our drivers safety is speaking with dry and May I have your e-mail address please
- ▶ **Customer 0:09**
David Judy four two six at AOL .com
- ▶ **Agent 0:18** (eDriving: A : Authentication - Name, eDriving: A : Authentication - DOB, Aceable : A : Authentication - DOB, Aceable: Agent Identifier - Agent, [ST QA] Verify - DOB, [ST QA] Acquire - Name)
thank you could you provide me with your name and date of birth
- ▶ **Customer 0:24**
I'm a candidate up in the please
- ▶ **Agent 0:27** (eDriving: A : Authentication - DOB, Aceable: A : Authentication - DOB, [ST QA] Verify - DOB, [ST QA] Acquire - Name)
did you provide me with the name and date of birth that is on your account
- ▶ **Customer 0:32** (eDriving: C : Authenticated - Name, Aceable: C : Authenticated - Name)
Stephanie the phone is my name is David Gallagher G U W E R the birthday is April twenty sixth nineteen thirty and my e-mail this is Dave G AVG four two six at AOL .com
- ▶ **Agent 0:51** ([T2] Seed: A: How May I Help?, Aceable: Agent Identifier - Agent, Aceable: A - Assurance Of Help, [ST QA] Offer Assistance)
thank you and how may I help you today

4.2/10 Tethr Effort Index: Moderate

7.2/10 Agent Impact Score: Above Average

Interaction details

Date: November 11, 2021

Time: 12:24am (10 min)

Language: English

Call group: Aceable, Zendesk_TicketCalls

Country: United States

State: New York

Location: Forest hills

Tag 1: 2141284

Tag 2: Inbound call from +1 (718) 261-5079

Call Details: Call from: +1 (718) 261-5079

Call to: +1 (800) 350-7025 Time of call:

2021-11-11 00:24:31 UTC Location: Forest

hills_ New York_ United States Answered

by: Joyianne Evans Length of phone call:

13 minutes_ 12 seconds Listen to the

recording:

<https://xgrit.zendesk.com/api/v2/channels/voice/calls/CAa6b737582ab4e5ad581a7e136ea49608/twilio/call/recording>

customer: Aceable

Search for keywords or phrases

Advanced

Filters (1)

Graphing

Export

Agent Impact Score: 5.3 | Tethr Effort Index: 5.3

🔍 Aceable, Zendesk_TicketCalls, Felecia Fearon

Today at 12:39am · 7 min

[T2] Effort: A: Acknowledgement [T2] QA: Agent Name Aceable: Greeting- Agent Introduction Aceable: Greetings- Opening -Thanking the customer Aceable: 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 Aceable: Empathy-Apology Aceable: Positive Sentiments Aceable: Negative Sentiment Aceable: Certificate issue identifier (2) eDriving: A : Authentication - DOB eDriving: Call Driver: Certificate Status eDriving: Agent Identifier - Customer eDriving: Agent Identifier - Agent Aceable: A : Authentication - DOB Aceable: A : Authentication - Name Aceable: Agent Identifier - Agent (3) Aceable: 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

🔍 Aceable, 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) Aceable: Greeting- Agent Introduction Aceable: A - Assurance Of Help Aceable: Greetings- Opening -Thanking the customer (2) Aceable: A - Email verification Aceable: A : Further assistance (2) Aceable: 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 Aceable : Advancing the course Aceable: Empathy-Apology Aceable : Resetting the password -Identifier (4) Aceable: Positive Sentiments Aceable: Negative Sentiment (2) Aceable: 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 Aceable: A : Authentication - Name Aceable: Agent Identifier - Agent (4) Aceable: A: Assuming Sale Aceable: 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

🔍 Aceable, 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) Aceable: Greeting- Agent Introduction Aceable: A - Refund Details (4) Aceable: A - Assurance Of Help (2) Aceable: Greetings- Opening -Thanking the customer Aceable: A - Email verification Aceable: A: Thanking for Hold Aceable: Agent Effort - Acknowledgement Aceable: A : Further assistance Aceable: 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) [ST QA] 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 Aceable :Verification Process - Unlocking Account Aceable : Advancing the course Aceable: Empathy-Apology (4) Aceable: Closing (3) Aceable: Refund Calls Identifier (9) Aceable: Positive Sentiments (3) Aceable: Negative Sentiment (4) Aceable: Positive Response (3) [ST FI] A: Balance Advisement Aceable: 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 Aceable: A : Authentication - DOB (2) Aceable: C : Authenticated - Name Aceable: Agent Identifier - Agent (6) Aceable: A: 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) [ST Effort] 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

🔍 Aceable, 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 Aceable: Greeting- Agent Introduction Aceable: A - Assurance Of Help Aceable: Greetings- Opening -Thanking the customer Aceable: A - Email verification (2) Aceable: A : Further assistance (2) Aceable: 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 Aceable : Complete Course Information - Sale call Only Aceable : Advancing the course (2) Aceable: Empathy-Apology (2) Aceable: Negative Sentiment Aceable: Hold Identifier eDriving: A : Authentication - Name eDriving: A: Survey Request eDriving: Product Driver - Get Insurance Discount eDriving: Agent Identifier - Agent Aceable: A : Authentication - Name Aceable: 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)

Putting it all together

1. Data



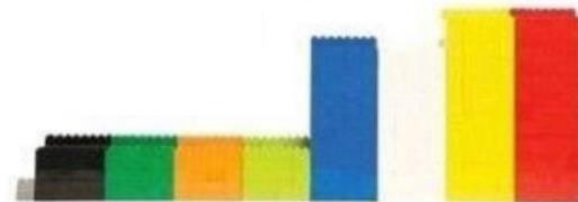
3. Arranged



2. Sorted



4. Presented Visually



5. Explained with a Story



Now you have,
BIG DATA



THE 3Vs OF BIG DATA

Volume

- Amount of data generated
- Online & Offline Transactions
- In kilobytes or terabytes
- Saved in records, tables, files

Velocity

- Amount of data generated
- Online & Offline Transactions
- In kilobytes or terabytes
- Saved in records, tables, files

Variety

- Amount of data generated
- Online & Offline Transactions
- In kilobytes or terabytes
- Saved in records, tables, files

Case Study

How to use the data?

A Tale of Two Call Centers...

Once Upon a Time, there were two call centers...

Center Alpha



Center Beta



Center Alpha

Tenured leaders with 8+ Years of Campaign Experience

Core team with 5+ years of experience

English is First Language

Using AI-Powered Speech Analytics for Reactive Performance Management

Leadership

Campaign

Language

Technology

Center Beta

Leaders with 6+ Years of Experience, but not in relevant campaign.

No Core Team. Onboarding Fresh Team Members.

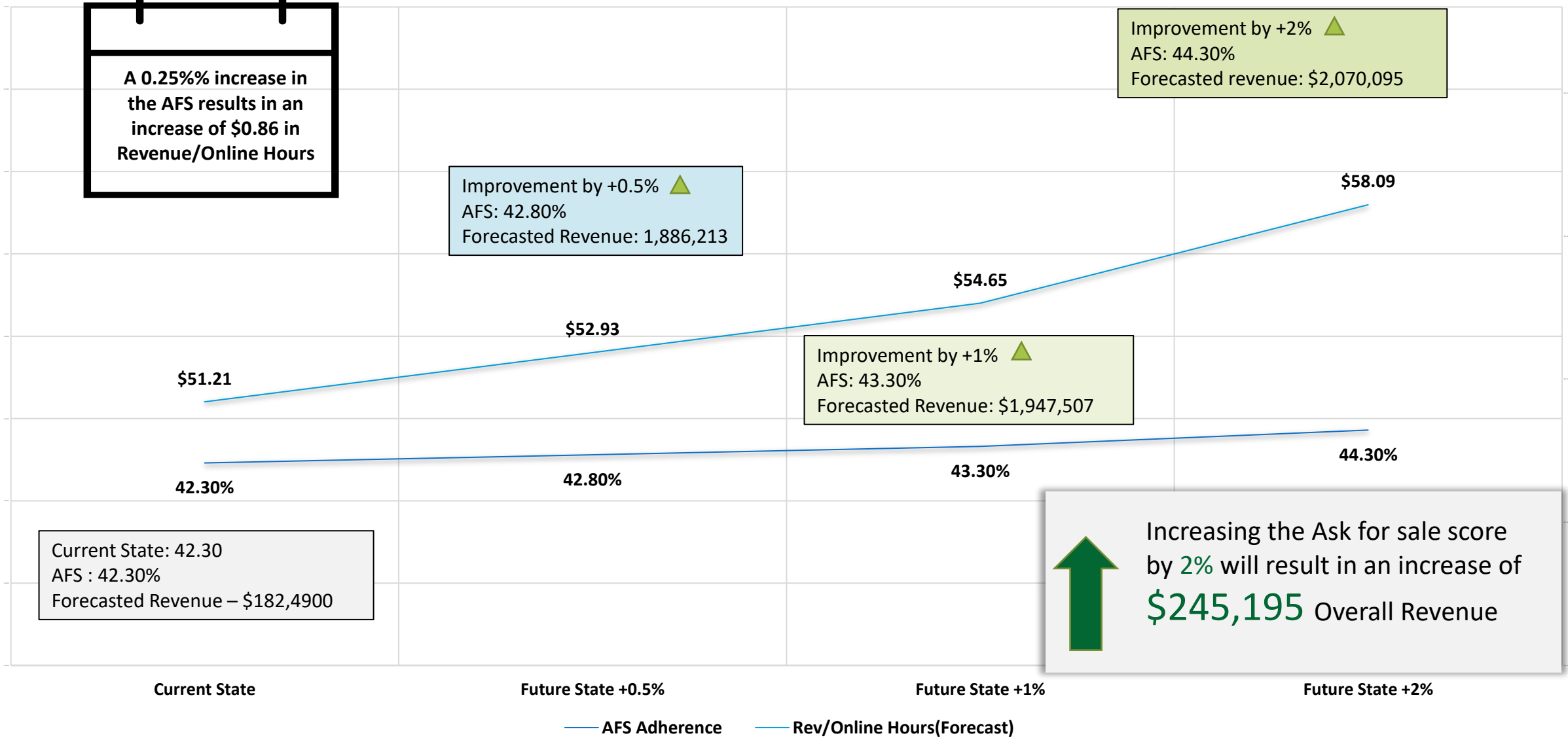
Offshore Center. English is Second Language.

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

- Proactive Design Training
- Nesting
- First 30 Performance Management

Predicting the Future Based on Past

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



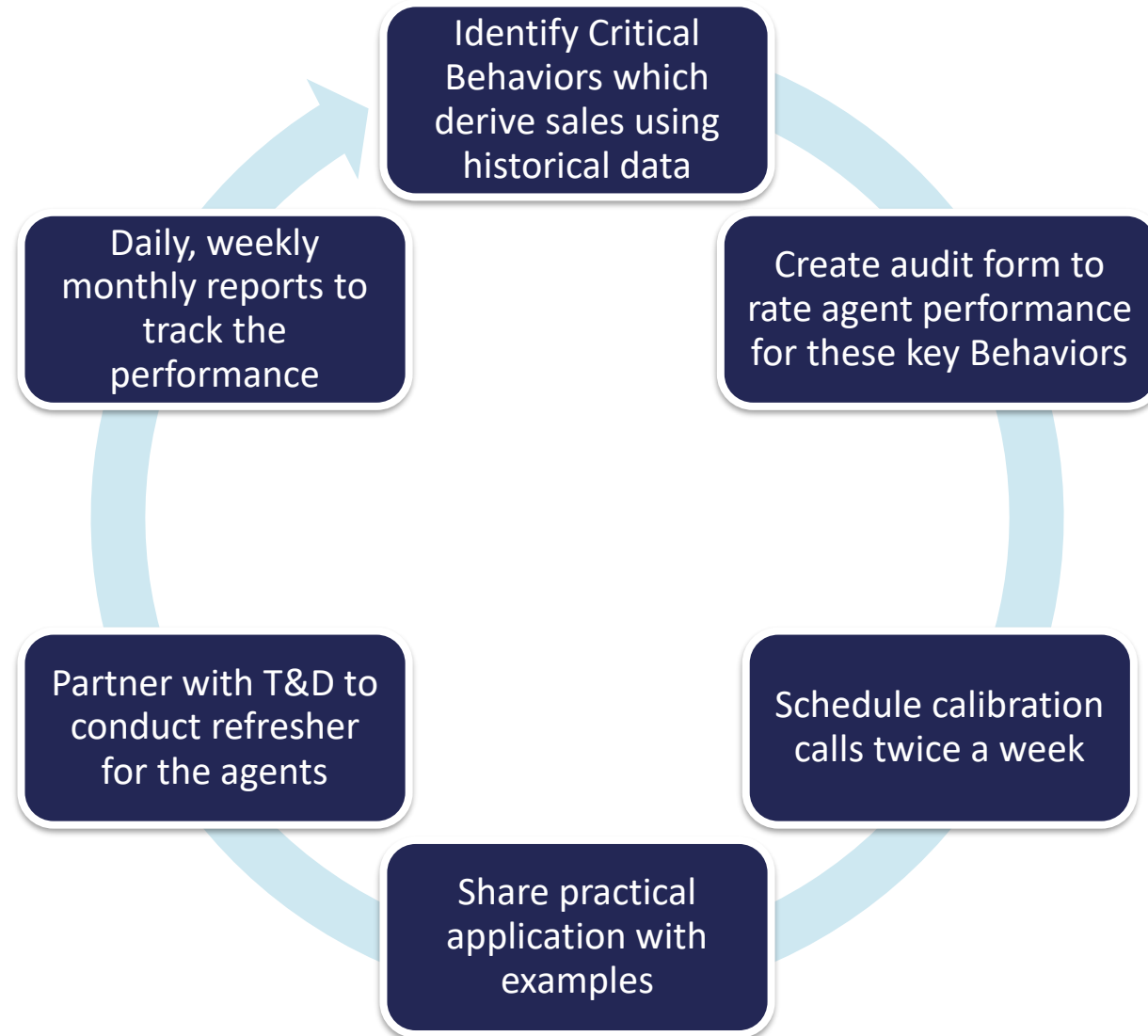
Current State: 42.30
AFS : 42.30%
Forecasted Revenue – \$182,4900

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

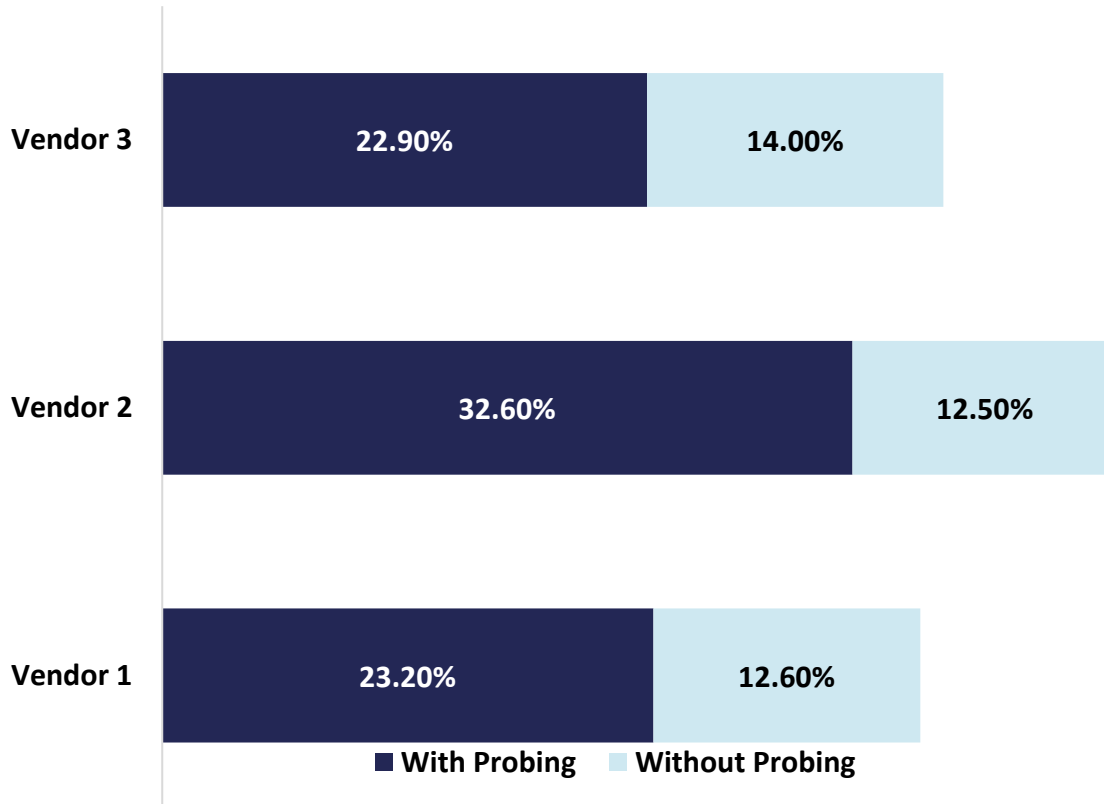
Improvement by +1% ▲
AFS: 43.30%
Forecasted Revenue: \$1,947,507

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

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



Sales Conversion Impact



➤ Discovery questions create opportunities to recommend additional products and services, overcome customers' objections. It helps the agent to understand customer requirement and recommend product accordingly

➤ Examples

- Can you describe your current data usage for me?
- What types of things do you use your phone for?
- May I ask what drew your interest in this device?
- What features are you looking for in your new phone?

Chat Flow – Pacesetters v/s Herd

Pacesetters

- Assurance of Help
- Loyalty Acknowledgement
- Discover customers requirement
- Recommendation
- Assume the sale
- Buy More Save More Accessory Bundle pitch
- Offering single accessory as a rebuttal
- Protection Plan pitch with benefits
- Providing rebuttals
- Recap order
- Asking for further assistance

Top agents believe in creating a positive first impression. They provide personalized assurance of help along with acknowledging their loyalty towards the brand

Top agents explain the benefits of protection plan along with the pitch

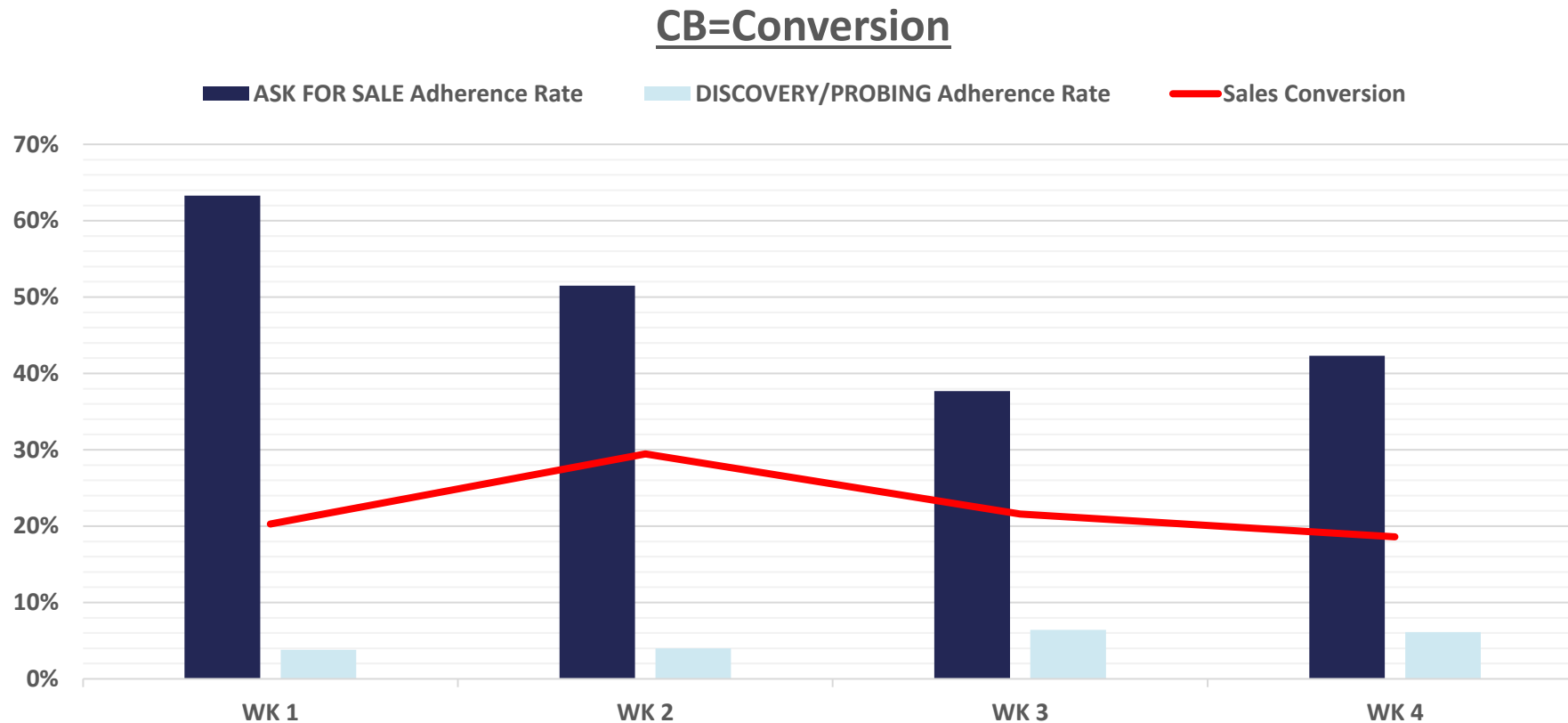
Rest of the agents do not try to overcome the objection for accessory and Protection plan

Herd

- Assurance of Help
- Asking clarification questions
- Recommendation
- Assume the sale
- Accessory pitch
- Protection Plan pitch
- Recap order
- Thank the customer for placing the order
- Asking for further assistance

Rest of the agents are more robotic in nature, more of order takers and misses out to explore additional opportunities in their conversation

- What is a 'Critical Behavior' or 'Key Performance Behavior'?
- Why is Critical Behavior Adherence important?





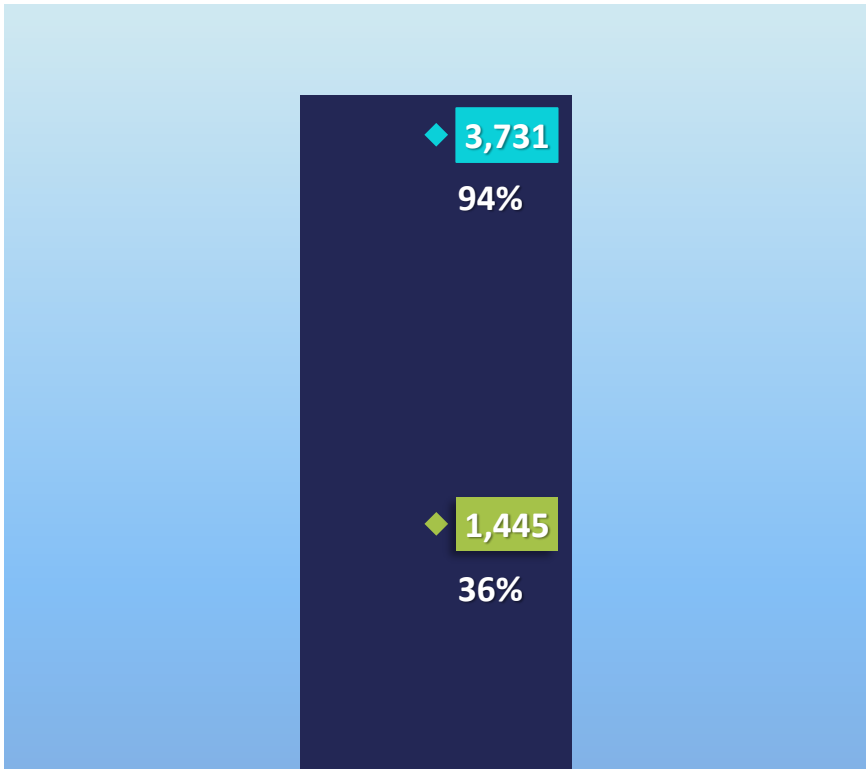
Etech + Vaspian Case Study

Using Speech Analytics powered by HI + AI

Negotiation



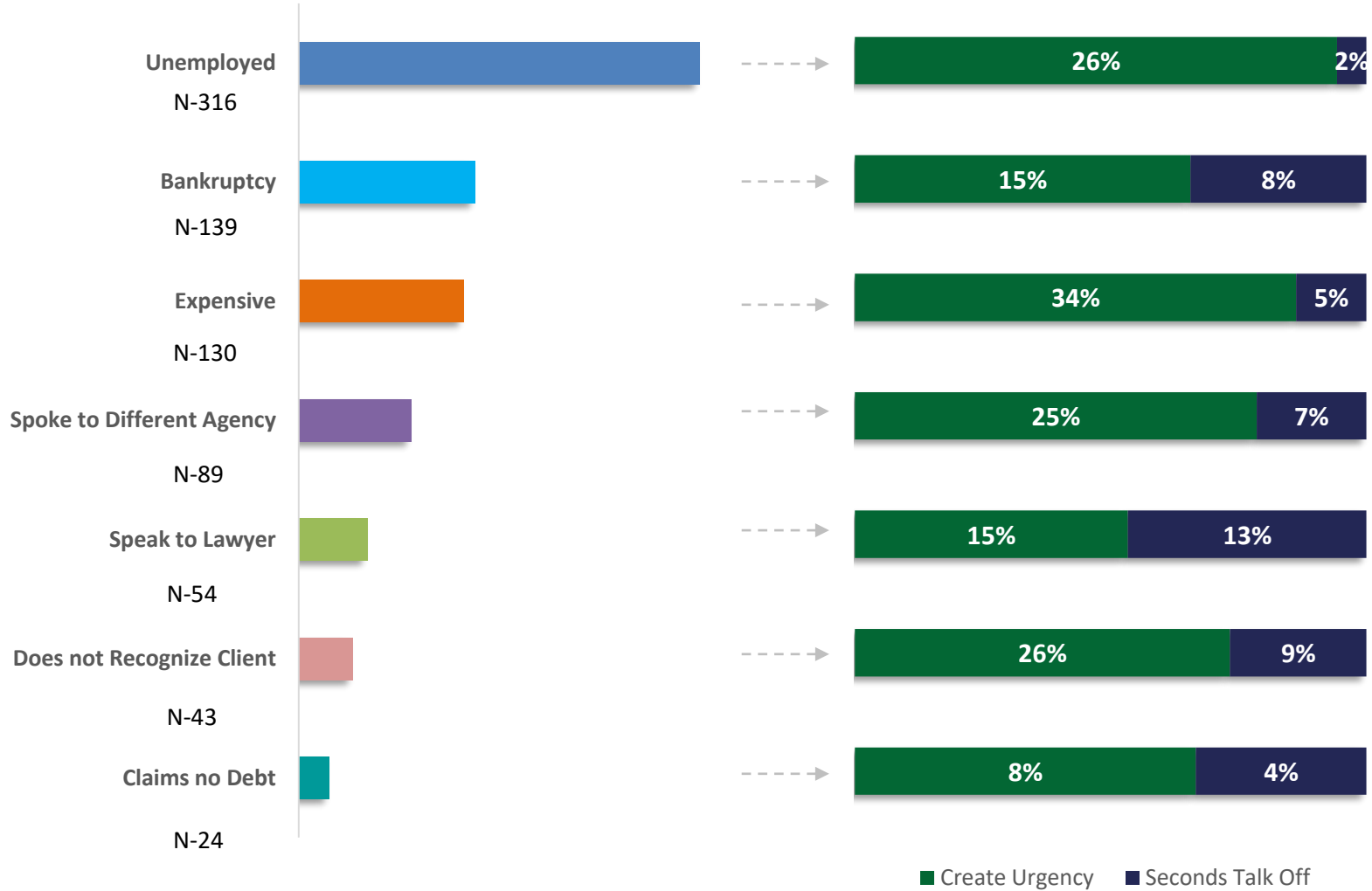
Payment Ladder



Negotiation Calls
 Balance in Full
 Offer Settlement

N – 3,964

Overall Negotiation 25.4%

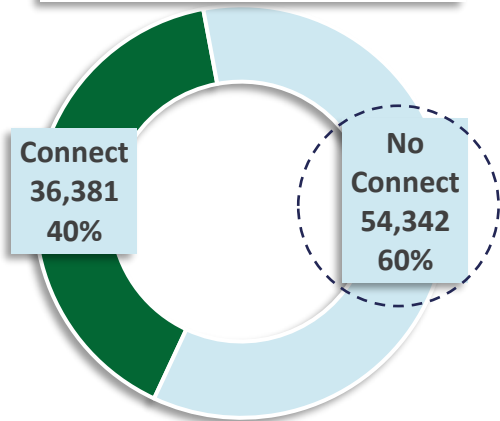


Create Urgency
 Seconds Talk Off

Unsuccessful Connect

Entire Population

Outbound

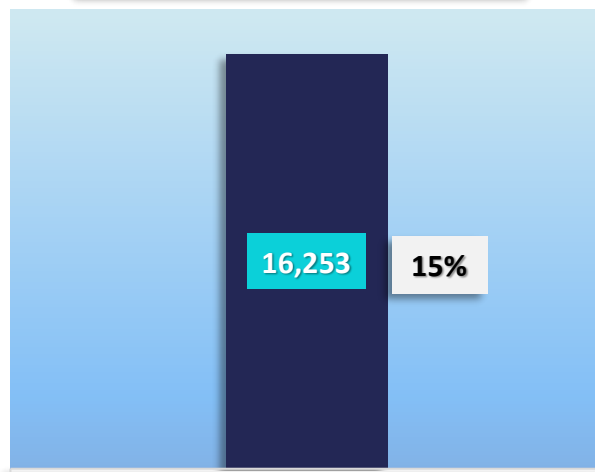


N-90,723

Agent Leaves Call back Number on 38%

2% Increase in agents attributing to leaving a Call back number on Unsuccessful connect calls compared to month of September

Consumer Returning Call



N-107,724

October

15% Consumer calls us after receiving Voicemail

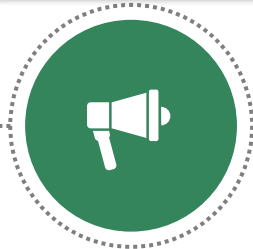
1% Decrease in call back receiving from customer observed compared to month of September

Collection Approaches

Give the debtor a clear choice of action



Convince the debtor that settling the loan amicably is better than pursuing court litigation



Get Payment

Educate the debtor of the credit policies and procedures of the creditor . For example: penalty charges will be imposed once payment is not done on time.

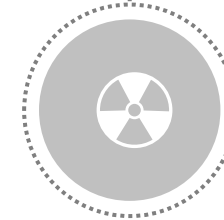


Firm persuasion done in a friendly atmosphere



Prefer a short repayment term to minimize risks of payment defaults

Assist the debtor if he has repayment problems with the end in view of formulating a mutually acceptable repayment plan



How to Fix

What to Fix

People

Train & Educate agents on Strategic behavior

Immediately address low hanging opportunities like **Strategic agent behavior: Voicemail, Branding (Greeting & Closing)**

Consent

Taking consent of a person before calling is very important and it helps the agents while dealing with consumer when they call.

Conduct Team Huddle for Quick Reinforcement daily – Collection & Resolution

Explain the importance of exhibiting all the Strategic behavior on potential complaints/Query calls

Promote

Online Payment

REGISTERING FOR ONLINE ACCESS ALLOWS YOU TO VIEW YOUR ACCOUNT INFORMATION 24 HOURS A DAY

- View your account balance
- Make payments
- Setup future payments

Alerts

HAVING ALERTS/REMINDER VIA EMAIL & MESSAGE PRIOR TO PAYMENT DATE WILL HAVE HASSLE FREE EXPERIENCE

Exhibit Strategic Behaviors on calls

- **Voicemail (Greeting & Closing)**
- **Consent**
- **Collection**



Overall Program QA Score

Date Type :-Call/Chat Date Date Range : 10/01/2021 To 10/31/2021 Total Evaluation : 18678

Client Name : Alliant Evaluation Form : Alliant - AI Voice Scorecard 1.1 Autofailure Evaluation : 0

Program : Alliant Location : ALL Sub Program : ALL

Agent Name : ALL Supervisor Name : ALL Partner Name : ALL



	Maximum Points	Total Possible Point	Total Scored	Performance (%)	Performance Bar	Status
Leave Voice Mail						
1. Did the agent leave Voice mail with call back details?	1	2295	578	25.19%	<div style="width: 25.19%;"></div>	●
Section Average		2295	578	25.19%	<div style="width: 25.19%;"></div>	●
Greeting						
2. Did the agent provide proper greeting?	1	16383	10966	66.94%	<div style="width: 66.94%;"></div>	●
3. Did the agent mention recording disclaimer	1	16383	6166	37.64%	<div style="width: 37.64%;"></div>	●
4. Did the agent identify as Debt Collector?	1	16383	4525	27.62%	<div style="width: 27.62%;"></div>	●
Section Average		49149	21657	44.06%	<div style="width: 44.06%;"></div>	●
Verification						
5. Did the agent acquire consumers name?	1	16383	2476	15.11%	<div style="width: 15.11%;"></div>	●
6. Did the agent state current creditor name? (is client name)	1	16383	2005	12.24%	<div style="width: 12.24%;"></div>	●
7. Did the agent state original creditor name?	1	16383	2131	13.01%	<div style="width: 13.01%;"></div>	●
8. Did the agent verify Date of birth?	1	16383	5035	30.73%	<div style="width: 30.73%;"></div>	●
9. Did the agent verify Last four digit of social security?	1	16383	3071	18.75%	<div style="width: 18.75%;"></div>	●
Section Average		81915	14718	17.97%	<div style="width: 17.97%;"></div>	●
Consent						
10. Did the agent seek consent to use consumers phone number for future communication and notification purpose?	1	6345	322	5.07%	<div style="width: 5.07%;"></div>	●
Section Average		6345	322	5.07%	<div style="width: 5.07%;"></div>	●
Share Information						
11. Did the agent share the Balance to be paid?	1	6345	2952	46.52%	<div style="width: 46.52%;"></div>	●
Section Average		6345	2952	46.52%	<div style="width: 46.52%;"></div>	●
Ownership						
12. Did the agent exhibit willingness to assist?	1	16383	5135	31.34%	<div style="width: 31.34%;"></div>	●
13. Did the agent acknowledge consumer's concern	1	16383	12026	73.41%	<div style="width: 73.41%;"></div>	●

	Maximum Points	Total Possible Point	Total Scored	Performance (%)	Performance Bar	Status
Courtesy						
14. Did the agent talk over consumer?	1	16383	16205	98.91%	<div style="width: 98.91%;"></div>	●
15. Did the agent demonstrate active listening (Avoid repeating the consumer for information)	1	16383	15889	96.98%	<div style="width: 96.98%;"></div>	●
16. Did the agent exhibit professional behaviour throughout the call?	1	16383	16336	99.71%	<div style="width: 99.71%;"></div>	●
Section Average		49149	48430	98.54%	<div style="width: 98.54%;"></div>	●
Hold						
17. Did the agent follow correct hold procedure?	1	16383	129	0.79%	<div style="width: 0.79%;"></div>	●
Section Average		16383	129	0.79%	<div style="width: 0.79%;"></div>	●
Collection						
18. Did the agent ask for payment in full before offering settlement amount/Payment plan?	1	6345	158	2.49%	<div style="width: 2.49%;"></div>	●
19. Did the agent offer settlement amount?	1	638	247	38.71%	<div style="width: 38.71%;"></div>	●
20. Did the consumer agree for payment?	1	6345	333	5.25%	<div style="width: 5.25%;"></div>	●
21. Did the agent create urgency for payment?	1	6345	1093	17.23%	<div style="width: 17.23%;"></div>	●
21.1 If Not, Did the Agent attempt to convince the consumer?	1	5252	154	2.93%	<div style="width: 2.93%;"></div>	●
21.2 If Not, Did the agent attempt to speak to other person apart from consumer? (Second Talk off)	1	5252	269	5.12%	<div style="width: 5.12%;"></div>	●
22. Did the agent provide confirmation number after scheduling the payment	1	333	189	56.76%	<div style="width: 56.76%;"></div>	●
Section Average		30510	2443	8.01%	<div style="width: 8.01%;"></div>	●
Resolution						
23. Did the agent ask clarifying questions to better understand the scenario?	1	16383	6557	40.02%	<div style="width: 40.02%;"></div>	●
Section Average		16383	6557	40.02%	<div style="width: 40.02%;"></div>	●
Closing						
25. Did the agent provide proper closing?	1	16383	5522	33.71%	<div style="width: 33.71%;"></div>	●
Section Average		16383	5522	33.71%	<div style="width: 33.71%;"></div>	●
QA Score Without Auto Failure		307623	120469	39.16%	<div style="width: 39.16%;"></div>	●



Practical Application






Section	Scenario	Practical Application 1	Practical Application 2	Current %	Previous %
Voicemail	Call Reason	This is miles from Zach with the light Capital management calling regarding the business matter in my office is open you get resolved	My name is Jessie Burke that I am with the long of Capital management some following up with you regarding a business matter in my office receive directly concerning yourself as of today, you still have not made any statements Nora notified us as to your intentions regarding the situation.	52%	26%
	Call Back Number	Please give me a call back at ###-###-####.	Call me back Robert my office number is ###-###-####	22%	21%
Greeting	Recording Disclaimer	I just need to inform you the call may be recorded for quality and training purposes.	The call may be recorded for quality and training purposes.	48%	49%
	Identify Debt Collector	It is a communication with a debt collector in attempt to collect a debt and any information.	This is an attempt to collect a debt by a debt collector.	59%	78%
Verification	Current Creditor Name	This is in regards to our client C K is Prime investments	It's owned by security credit Services. You have a balance of	47%	44%
	Original Creditor Name	We are doing a review regarding smart P leasing sign to lease an agreement with them.	They purchased an account that you had with a company called check and go they has gone and sent that through their normal collections process	17%	11%
	Verify SSN	The last four of your social security number	I just need to either for a date of birth or last four the social verified.	68%	71%

Velocity - Heat Map



Agents	VM Calls	Voicemails	Total (Exclude VM) Calls	Greeting	Verification	Consent	Share Information	Ownership	Courtesy	Hold	Collection	Resolution	Closing
Keith Jones	0	NA	31	92.5%	51.6%	6.5%	93.5%	66.1%	90.3%	42.9%	6.0%	77.4%	22.6%
Khaner Smith	0	NA	9	96.3%	33.3%	0.0%	77.8%	66.7%	96.3%	0.0%	15.0%	77.8%	44.4%
Lisa Wisniewski	0	NA	1	33.3%	40.0%	0.0%	0.0%	50.0%	100.0%	NA	0.0%	0.0%	100.0%
Melvin McGowan	0	NA	1	66.7%	40.0%	0.0%	0.0%	50.0%	100.0%	NA	33.3%	0.0%	0.0%
Myles fronczak	0	NA	4	75.0%	65.0%	0.0%	50.0%	62.5%	100.0%	0.0%	0.0%	25.0%	100.0%
Myslene Doresthan	0	NA	3	100.0%	66.7%	0.0%	100.0%	66.7%	100.0%	NA	15.4%	100.0%	33.3%
Nora Jackson	0	NA	16	81.3%	47.5%	0.0%	81.3%	68.8%	100.0%	0.0%	9.5%	75.0%	18.8%
PAM MORAN	0	NA	2	100.0%	60.0%	100.0%	100.0%	100.0%	100.0%	0.0%	22.2%	100.0%	50.0%
Paris Clark	1	0.0%	6	83.3%	46.7%	0.0%	33.3%	58.3%	94.4%	0.0%	14.8%	66.7%	33.3%
Rahiem Jefferson	0	NA	9	92.6%	51.1%	0.0%	100.0%	88.9%	85.2%	0.0%	15.4%	77.8%	44.4%
Robert Harris	0	NA	15	91.1%	48.0%	0.0%	86.7%	66.7%	100.0%	0.0%	9.0%	60.0%	26.7%
Scott Benedick	0	NA	2	50.0%	30.0%	0.0%	100.0%	75.0%	100.0%	NA	0.0%	100.0%	50.0%
Tiffany Andrzejak	0	NA	3	77.8%	46.7%	33.3%	33.3%	83.3%	100.0%	0.0%	7.7%	66.7%	33.3%
Valerie LaCour	0	NA	2	66.7%	80.0%	0.0%	50.0%	50.0%	83.3%	NA	0.0%	50.0%	0.0%
Veronica Duran	0	NA	5	53.3%	20.0%	0.0%	40.0%	50.0%	100.0%	NA	33.3%	60.0%	20.0%
Walter May	0	NA	3	88.9%	73.3%	0.0%	100.0%	100.0%	88.9%	NA	0.0%	NA	33.3%

Range	Color
0% - 40%	Red
40% - 70%	Orange
70% - 90%	Light Green
>90%	Dark Green

Period	September'21	October'21	Variance
Total population	114,311	115,254	 0.82%
Alliant Score Card	19,378	18,678	 3.61%
Right Party Contact (RPC)	6,290	6,345	 0.87%

Process

- ❖ Strategic Categories – Created categories after analyzing collection calls
- ❖ Automates score cards



Observation

Agent Mandates

- ❖ Drop on collection mandates related to Compliance, EOD and Negotiation is observed when compared the performances on monthly basis

Conversion

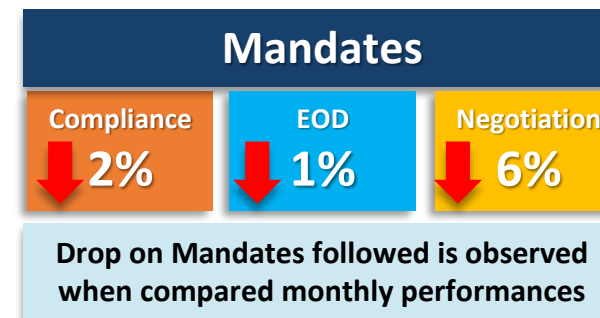
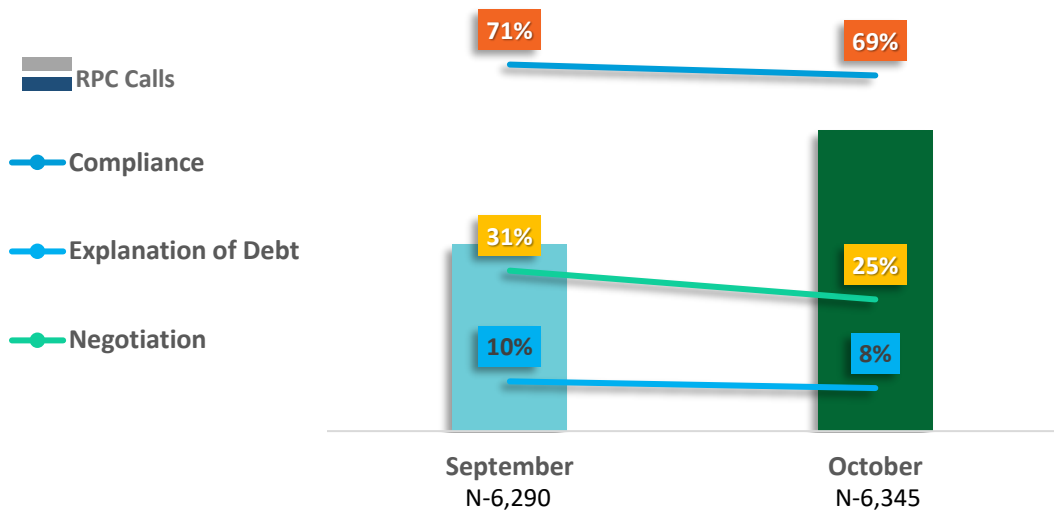
- ❖ Creating Urgency proved to improve the conversion rate drastically
- ❖ Data suggest when performed these strategic behavior conversion increases



Recommended Action Item

- ❖ **Train & Educate agents on Strategic behavior**
Immediately address low hanging opportunities like Creating Urgency
- ❖ **Conduct Team Huddle for Quick Reinforcement daily – Compliance, EOD and Negotiation**
Conduct pre-shift and post-shift Huddles to explain the importance of exhibiting all the Mandates on calls

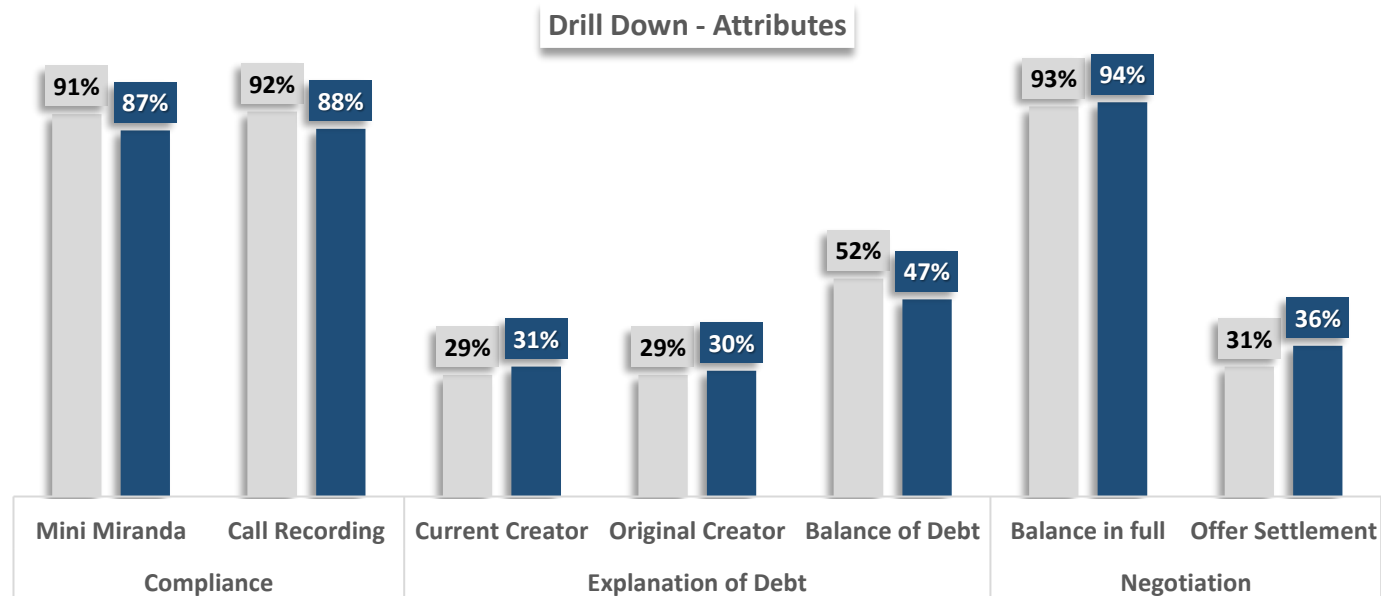
Mandates

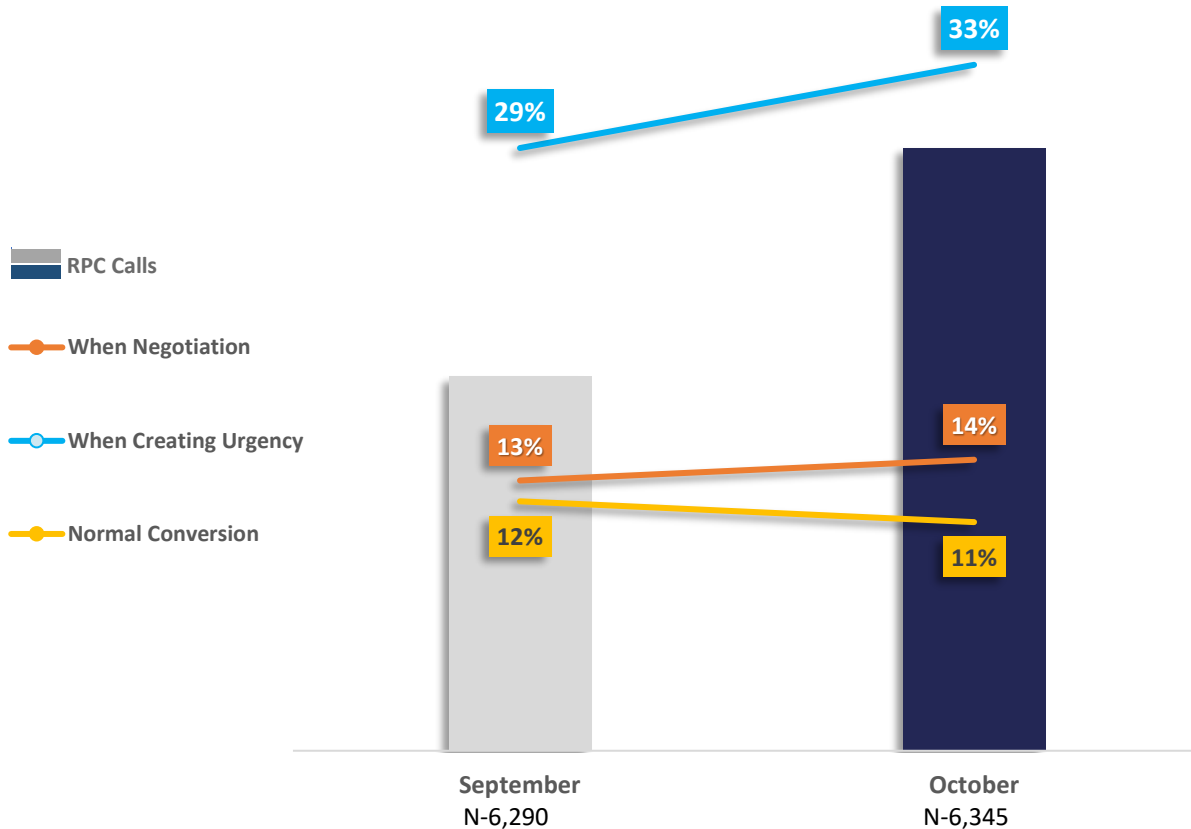


Drill Down - Attributes

Offer Settlement and Balance in full showed positive sign of improvement

However, rest attributes showed a drop in performance





Strategic Driver of Conversion

Overall Conversion With Negotiation

↓ 1%

Overall Conversion When Creating Urgency

↑ 4%

Conversion Impact

- **Conversion strategic behavior – Creating Urgency**
 - Increase by **17%** and **22%** for respective month of September and October is evident
 - Normal conversion show drop by **1%** when compared to October.

Omni channel Integration

Data Processing & Analytics

Actionable Insights

Dialer



Audio



Email



Chat



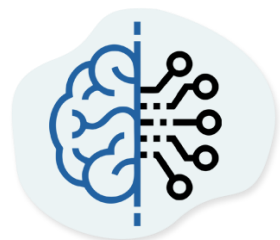
Text



CRM



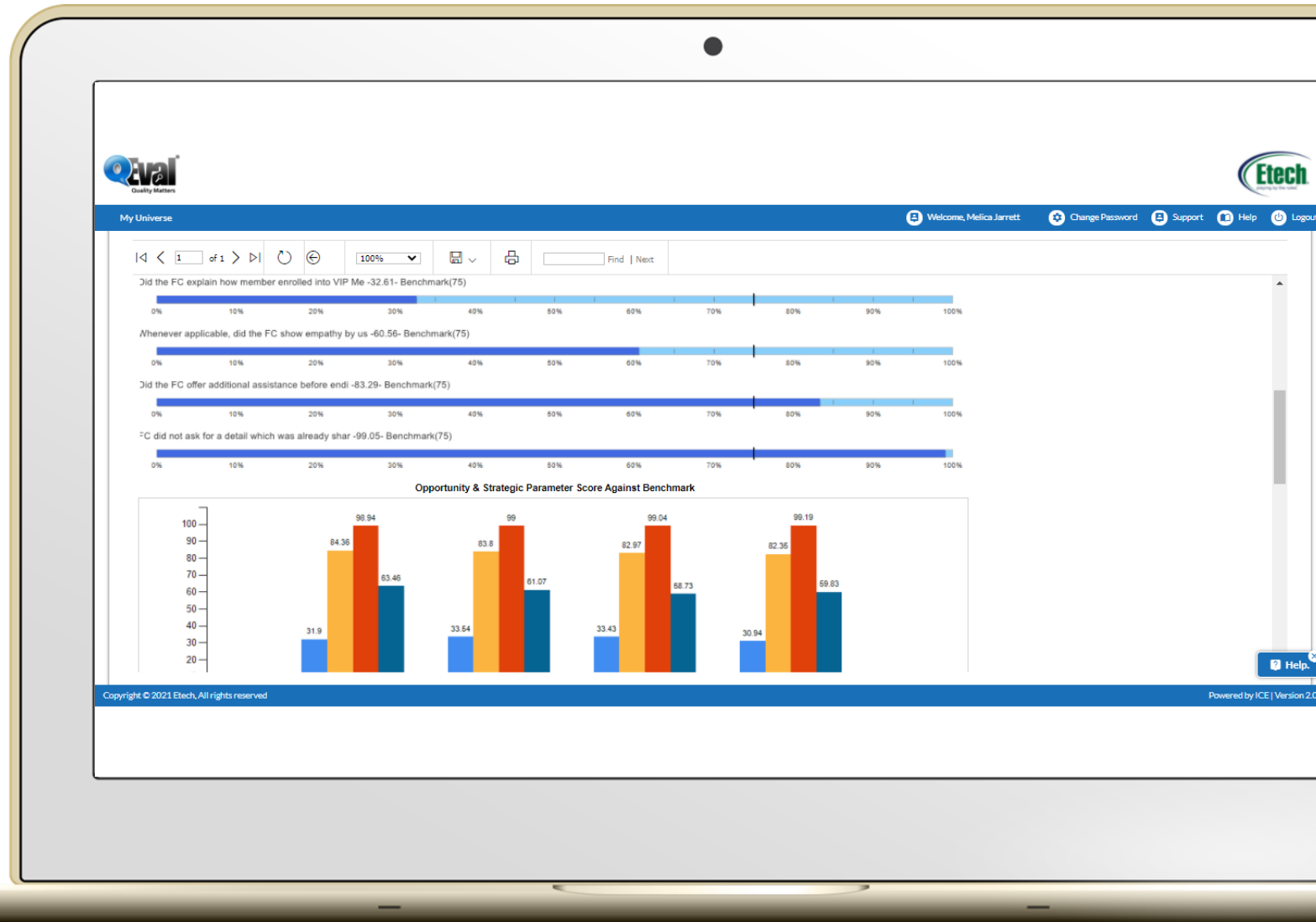
Survey



- ✓ Performance Recommendation to Agent
- ✓ Coaching Recommendations for Supervisors
- ✓ Automated Training Assignment
- ✓ Real-Time Alerts
- ✓ Tailored Dashboards
- ✓ Sentiment Analysis
- ✓ Coaching Effectiveness Module
- ✓ Real-Time Reporting
- ✓ VOC Analysis
- ✓ Business Insights

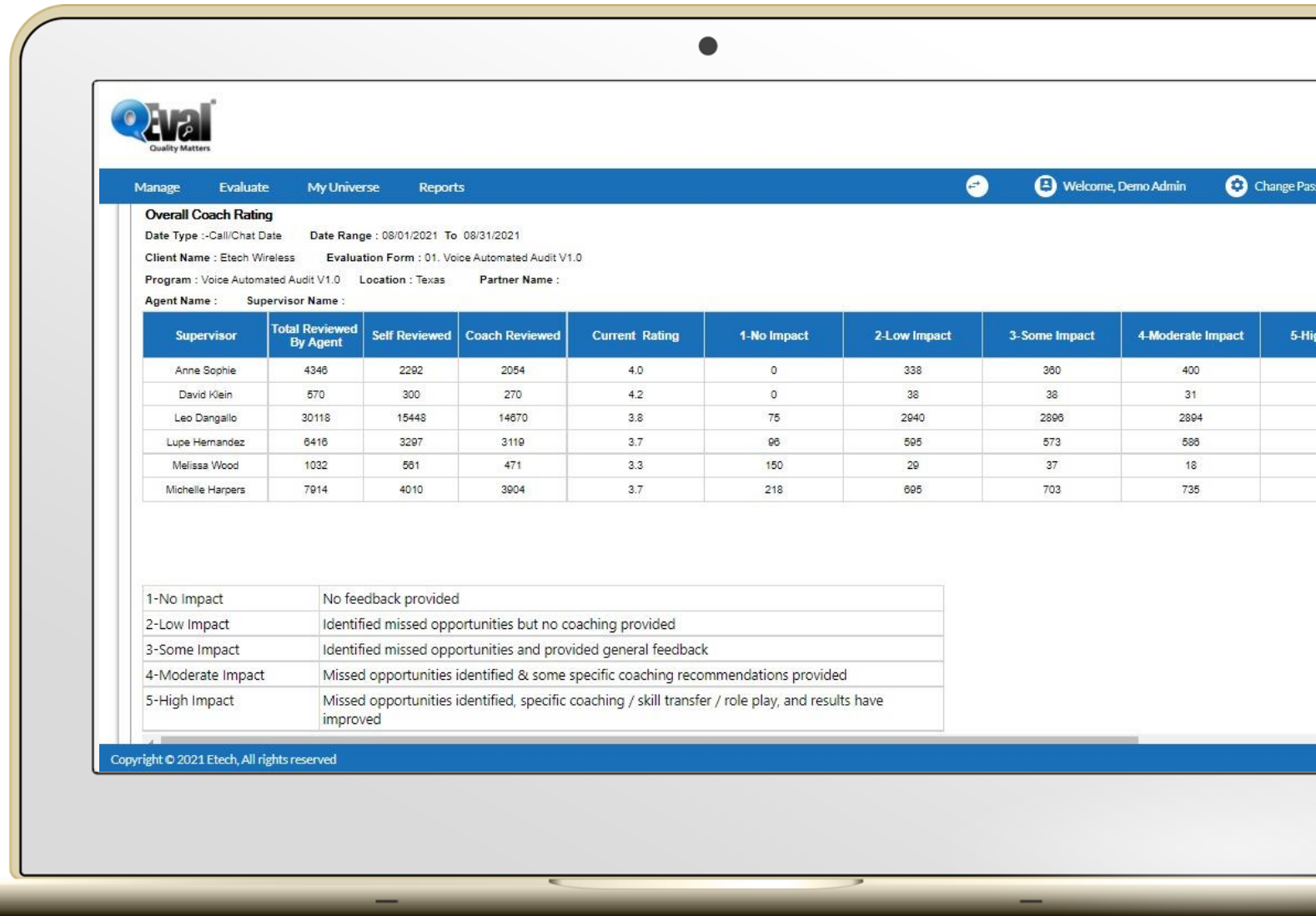
360-degree view of Agent Performance

- Support your contact center agents
- Track individual or team performance
- Identify & fix issues in real-time
- Stay ahead of compliance violations



Listen to your agents

- Empower agents to rate coaches
- Drill down to individual coaching performance for different time periods



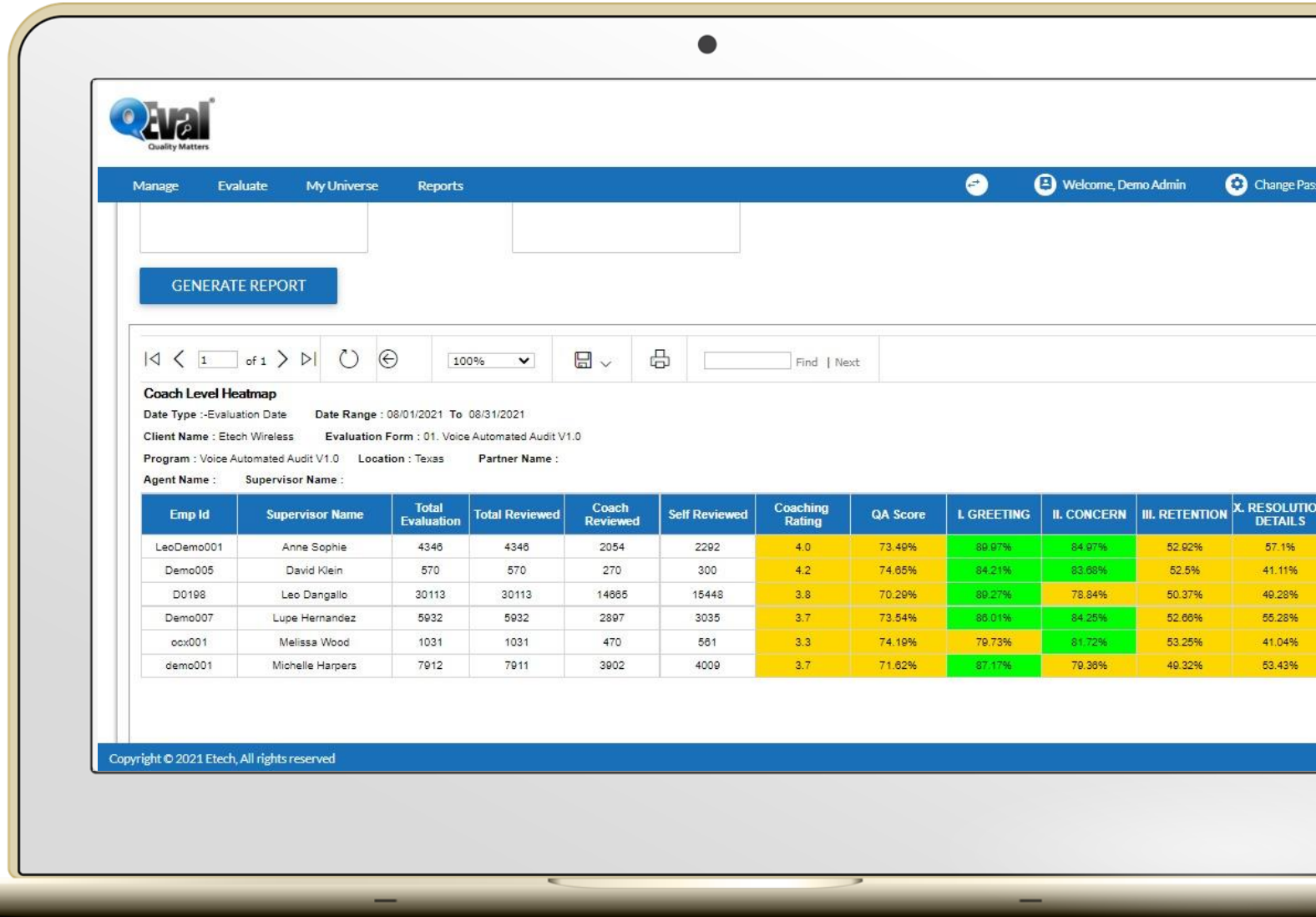
The screenshot displays the QVAL Quality Matters dashboard. At the top, there is a navigation bar with 'Manage', 'Evaluate', 'My Universe', and 'Reports'. Below this, the 'Overall Coach Rating' section is visible, showing filters for Date Type (Call/Chat Date), Date Range (08/01/2021 to 08/31/2021), Client Name (Etech Wireless), Evaluation Form (01. Voice Automated Audit V1.0), Program (Voice Automated Audit V1.0), Location (Texas), and Partner Name. A table below lists coaching data for various supervisors, including columns for Total Reviewed By Agent, Self Reviewed, Coach Reviewed, Current Rating, and impact levels (1-No Impact, 2-Low Impact, 3-Some Impact, 4-Moderate Impact, 5-High Impact). A legend at the bottom explains the impact levels: 1-No Impact (No feedback provided), 2-Low Impact (Identified missed opportunities but no coaching provided), 3-Some Impact (Identified missed opportunities and provided general feedback), 4-Moderate Impact (Missed opportunities identified & some specific coaching recommendations provided), and 5-High Impact (Missed opportunities identified, specific coaching / skill transfer / role play, and results have improved). The footer of the dashboard reads 'Copyright © 2021 Etech, All rights reserved'.

Supervisor	Total Reviewed By Agent	Self Reviewed	Coach Reviewed	Current Rating	1-No Impact	2-Low Impact	3-Some Impact	4-Moderate Impact	5-High Impact
Anne Sophie	4346	2292	2054	4.0	0	338	360	400	
David Klein	570	300	270	4.2	0	38	38	31	
Leo Dangallo	30118	15448	14670	3.8	75	2940	2896	2894	
Lupe Hernandez	6416	3297	3119	3.7	96	595	573	588	
Melissa Wood	1032	581	471	3.3	150	29	37	18	
Michelle Harpers	7914	4010	3904	3.7	218	695	703	735	

1-No Impact	No feedback provided
2-Low Impact	Identified missed opportunities but no coaching provided
3-Some Impact	Identified missed opportunities and provided general feedback
4-Moderate Impact	Missed opportunities identified & some specific coaching recommendations provided
5-High Impact	Missed opportunities identified, specific coaching / skill transfer / role play, and results have improved

Identify areas for improvement

- Analyze Coaching Effectiveness
- Root Cause Analysis





Robert Beasley

CEO - Tethr

Over the past 20 years, Robert has assisted U.S. and international tech companies in the areas of market assessment, strategy development, partnerships and sales force optimization.



robert.beasley@tethr.com

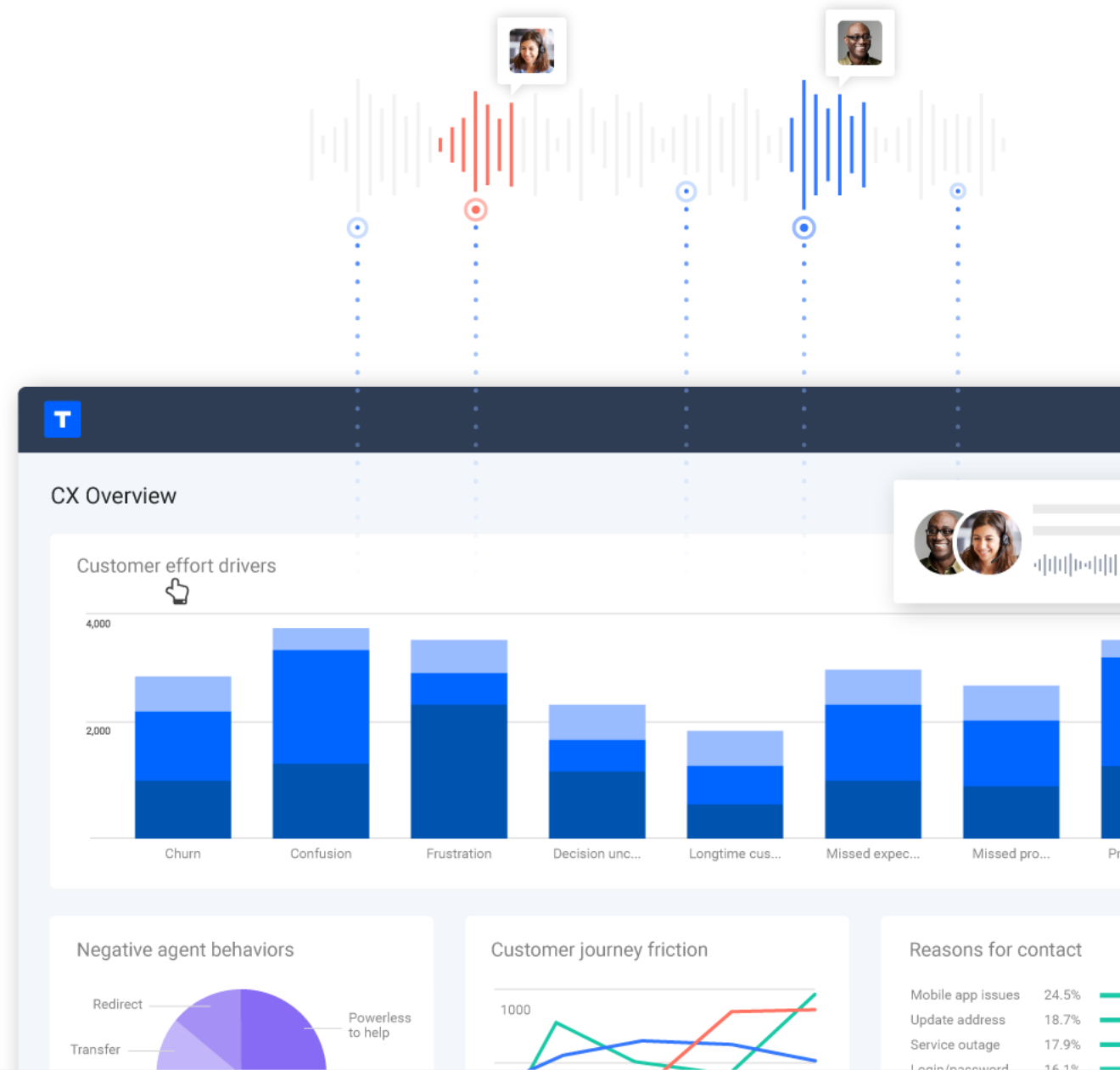


[linkedin.com/in/robert-beasley-79b960/](https://www.linkedin.com/in/robert-beasley-79b960/)

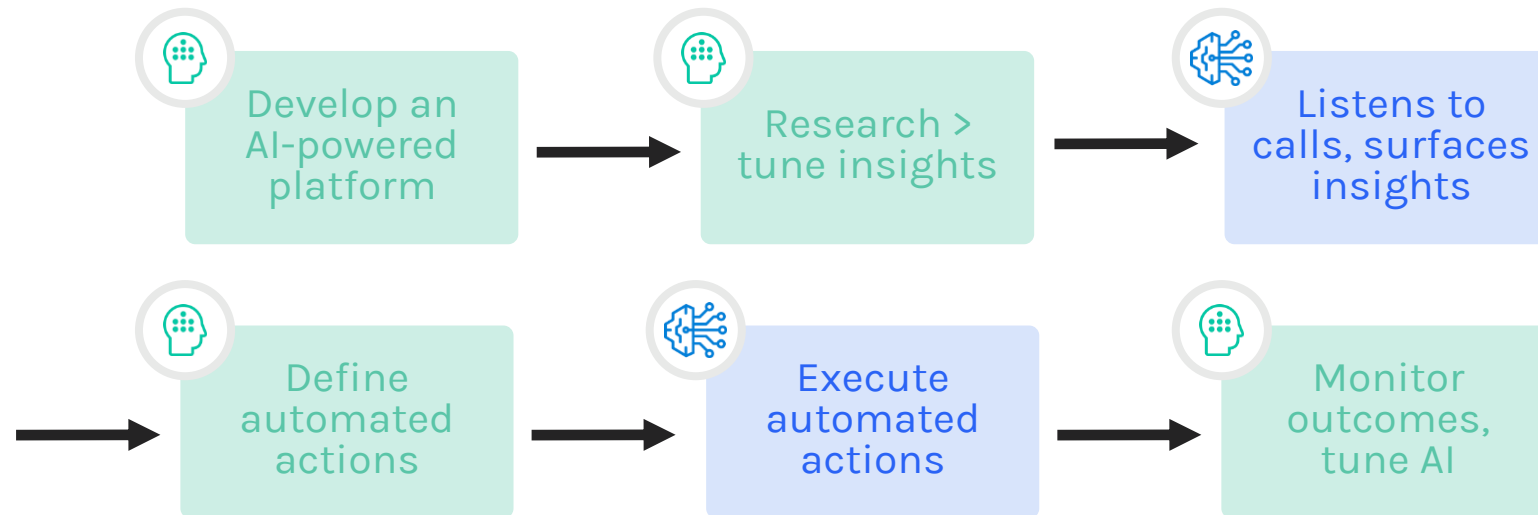


Conversation Analytics & Actioning Platform

Robert Beasley, CEO



Tethr: Conversation analytics & actioning platform



Human Intelligence (HI)



Artificial Intelligence (AI)

End state

Conversation Analytics & Actioning Platform

Conversations

Voice

Five9 inContact
NICE Red Box 8x8
talkdesk GENESYS
aws twilio zoom
audiocodes

Chat

freshworks aws
NUANCE
salesforce LIVEPERSON
Five9 DRIFT
zendesk



Prescriptive Dashboards
Churn, Sales, Cost, Agent Performance, Effort, CX

Executive Summaries
Agent Daily Digest
via email, slack, teams

Microsoft Teams slack

Automated Actions
Email, Task, Case, Survey, Coaching

qualtrics XM salesforce QEval Quality Matters

AI

27%

54%



Etech®

playing by the rules™



What would it take for you to believe?

- What's more realistic? 1 or 100?
- What's more actionable? 1 or 100?
- What's worth your time? 1 or 100?

When something goes wrong:

- How did it happen? The machine was not properly taught by the humans. Only answer.
- When does this REALLY matter? If it's statistically valid AND a reasonable response to the formed hypothesis and line of query
- When does it not?

Are you telling or being told? Vision check -

- Adaptation (Adaptability) is 100% dependent on Human Intelligence and the willingness/courage to put on a different set of glasses
- Are you evangelizing the benefits of using data to make intelligent performance decision or are you accepting that 1 is greater?

Bridging the gap between...



Performance Monitoring

- Quality Scores
- Long training sessions
- Finding challenges
- Evaluating a sample of calls

Technology

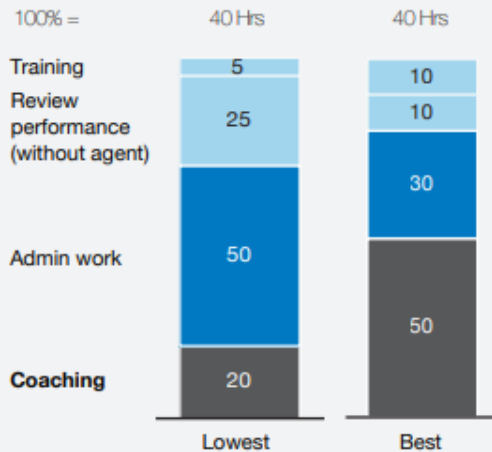
Performance Management

- Direct Feedback
- Targeted coaching
- Identifying opportunities
- Scalability - Evaluating 100% of customer interactions

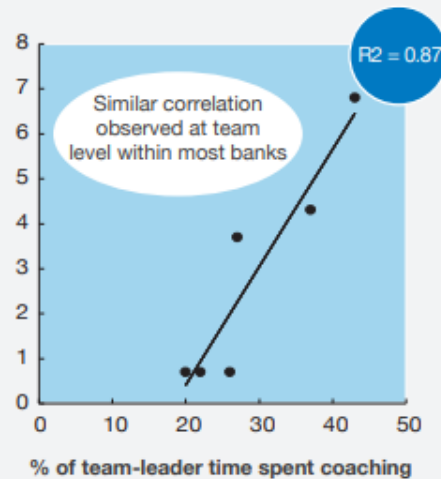
Exhibit 1

More coaching leads to more sales.

Team-leader time allocation
%



Sales-conversion rate for all products
%



In mature service-to-sales centers, this is closer to 50%-70%

Why is coaching crucial in 2021?

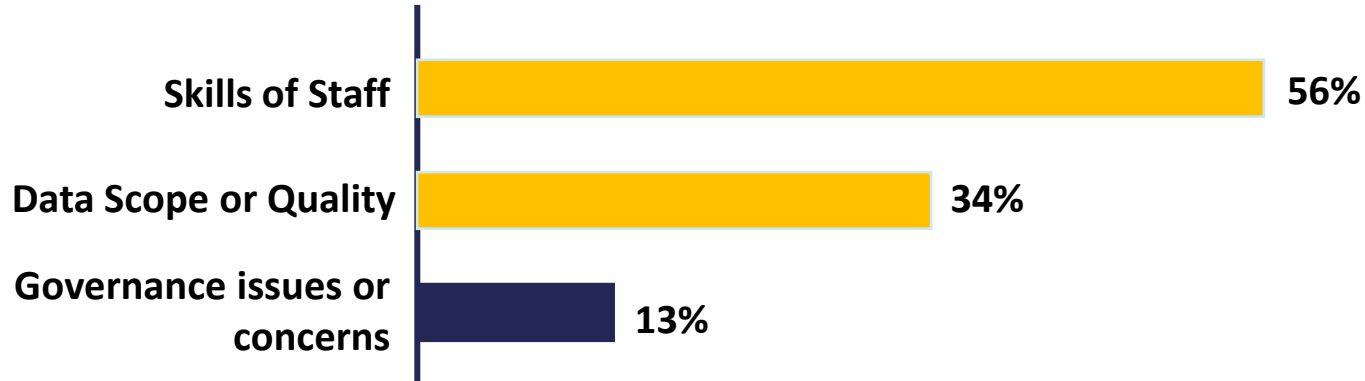
- Move beyond the traditional approach of 'Sampling' – Mine all data
- 'CX' is the key differentiator
- Ever-evolving customer behavior
- Millennials and Generation Z becoming major part of customer base
- Reducing attrition & retaining talent
- Changing market dynamics
- Team Upskilling

Source: [Smarter call-center coaching for the digital world](#)

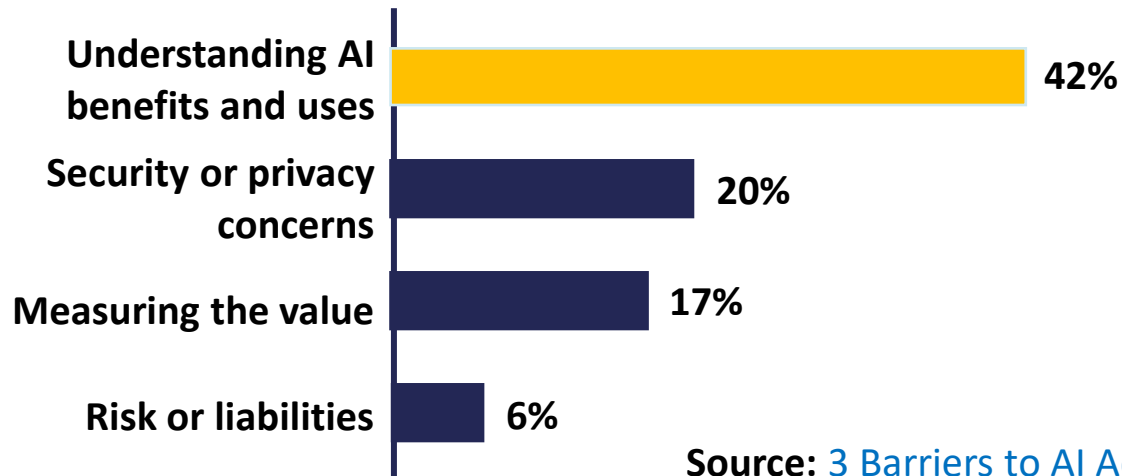
Top 3 Challenges to AI/ML Adoption



Enterprise maturity



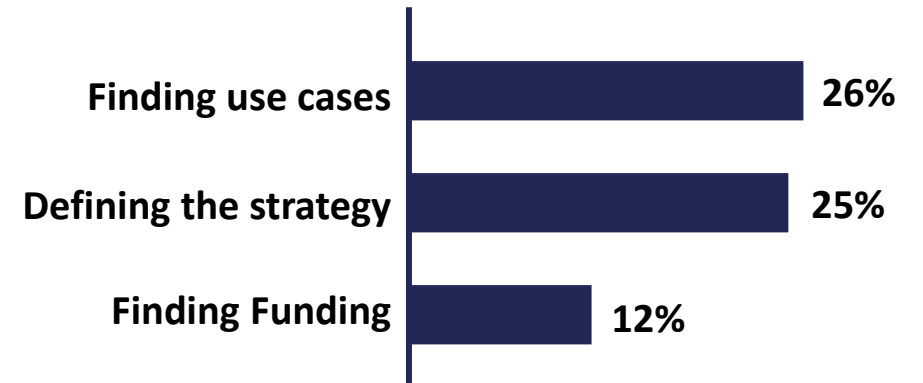
Fear of Unknown



Source: [3 Barriers to AI Adoption, Gartner](#)

Data quality derived from AI

Finding a starting point



Vendor strategy



Don't Coach the Call, Coach the Skill



Set objectives and goals for the entire organization



Analyze your data & establish baseline measurements



Prioritize your initiatives based on their ROI



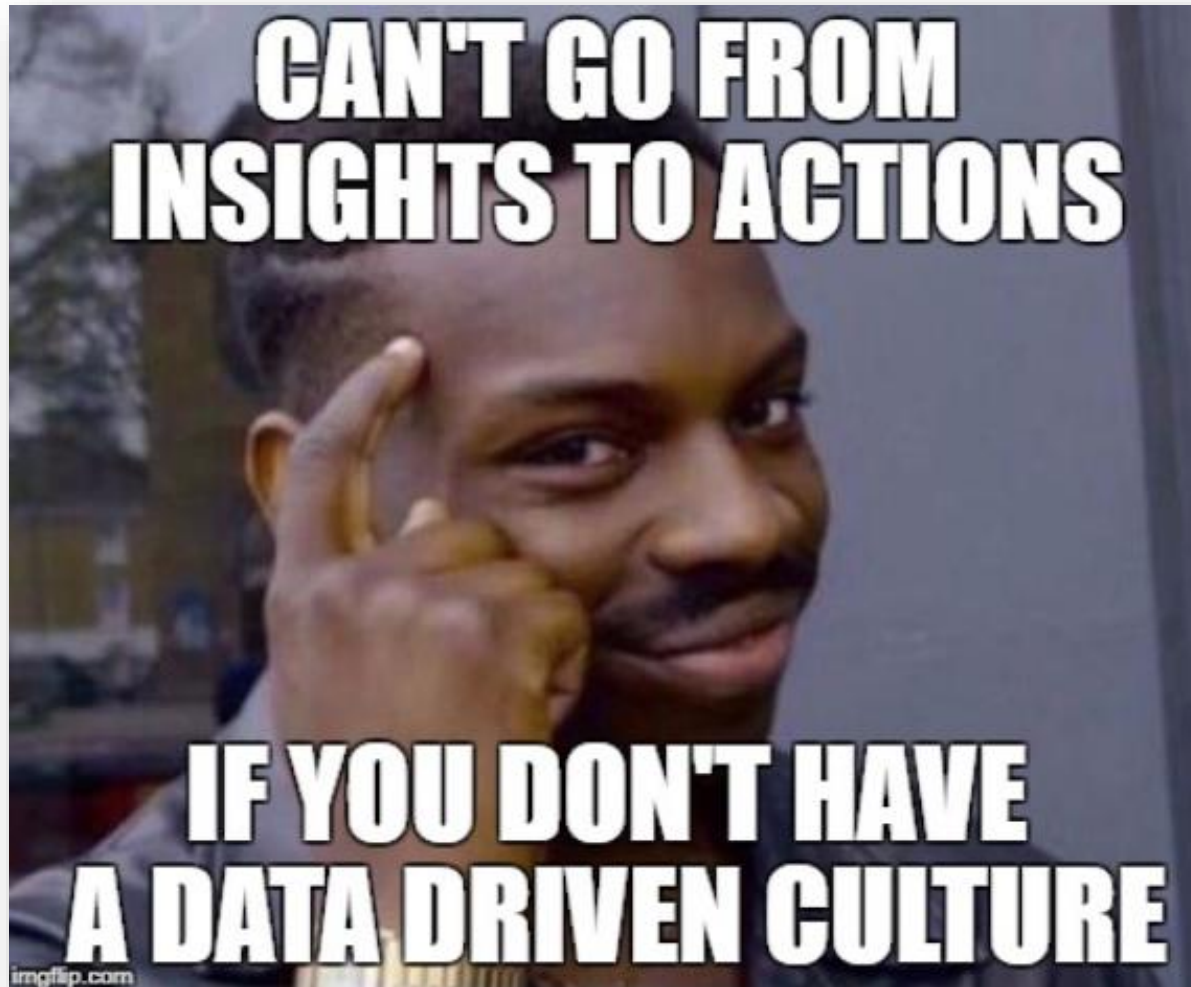
Develop a plan of action to put your findings to use across the organization



Ensure collaboration across the enterprise



Empower your teams by making them aware of the advantages and capabilities of Speech Analytics software



- You need FUNCTIONAL expertise, and not AI expertise to turn your insights, ACTIONABLE.
- Complex challenges are not **Reporting**.
- 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 meta data equals surgical output.
- Translating the data in an **intuitive, easy to use and understand UI format, visualization that is easy to access and ACTIONABLE.**



Jim Iyoob

Chief Customer Officer,
Etech



Shawndra Tobias

VP – Customer Experience,
Etech



Robert Beasley

Chief Executive Officer,
Tethr



Brian Hurley

Chief Executive Officer,
Vaspian

