

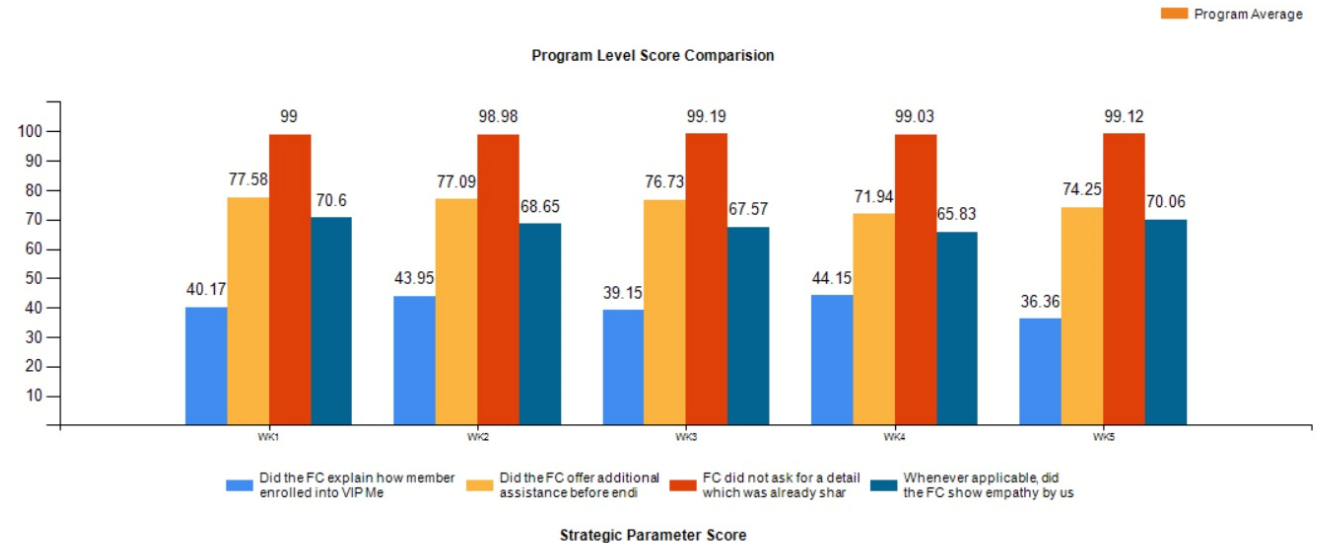
# The Experience Factor

## Igniting Performance with Deep Analytics

- Jim Iyob - Chief Customer Officer, Etech
- Shawndra Tobias - VP – CX, Etech
- Christopher Basile - VP - Call Center Operations, Phone.com



Manage Evaluate My Universe Reports Welcome, Demo Admin



# Meet our speakers for today



**Jim Iyoo**

Chief Customer Officer,  
Etech



**Shawndra Tobias**

VP – Customer Experience,  
Etech



**Chris Basile**

VP – Call Center Operations,  
Phone.com



## 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



# Agenda - What we will learn today?



## Why Speech Analytics?

- Benefits of Speech Analytics
- Why Speech Analytics initiatives fail?

## What are some of the Challenges?

- Understanding Customer Sentiments
- Agent Retention

## How to implement Speech Analytics?

- Understanding KPB, VOC Indexing
- Empowering Contact Center Agents by Integrated Coaching

## Building a Long-Term Strategy

- Transforming Experience through Analytics
- How to bridge the gap?
- Why Etech for Speech Analytics?

# Why Speech Analytics?



Identify Knowledge Gaps



Identify Market Insights



Distinguish and Quantify Coaching Needs



Improve Client Retention



Overall insights on in-depth level of performance



Actionable Insights into CX and Business Opportunities





## Cost Reduction

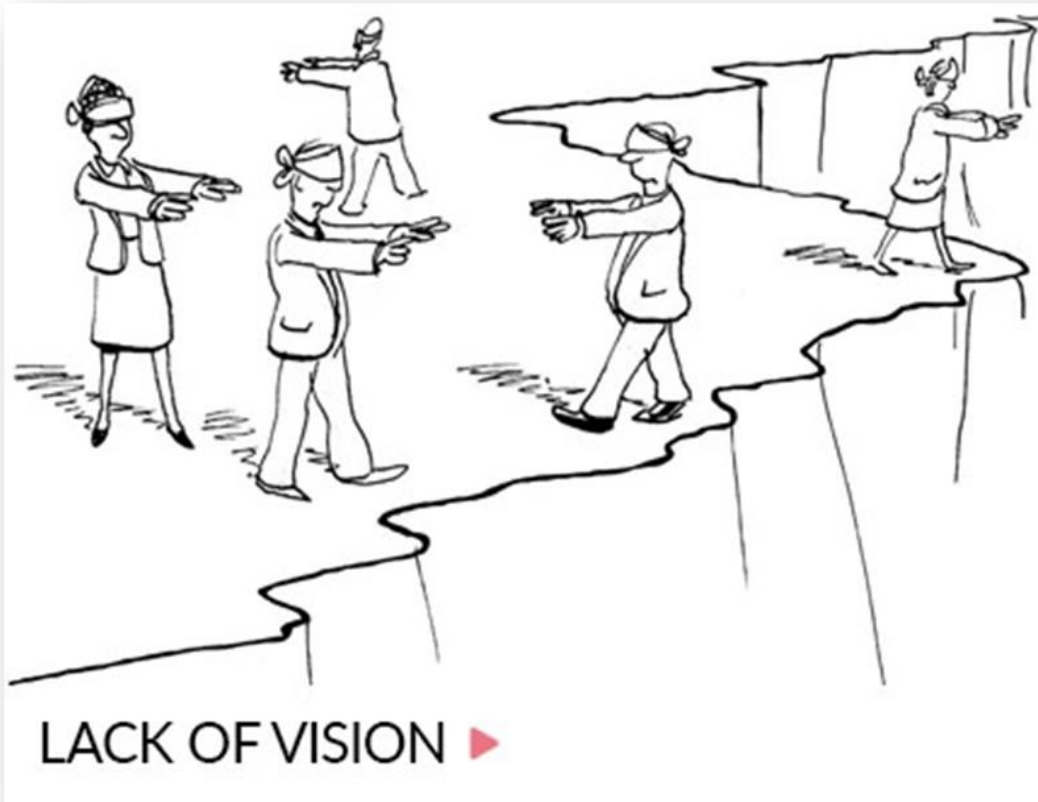
- Automated Compliance Monitoring
- Avoid non-compliance regulatory fines
- Reducing Call Volume, by identifying customer's reason for call
- Eliminate unnecessary call backs by improving FCR
- Upgrading the self-service through website and intelligently using IVR programs
- Reduced transfers and time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



## Revenue Increase

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

# Why Speech Analytics Project Fail?

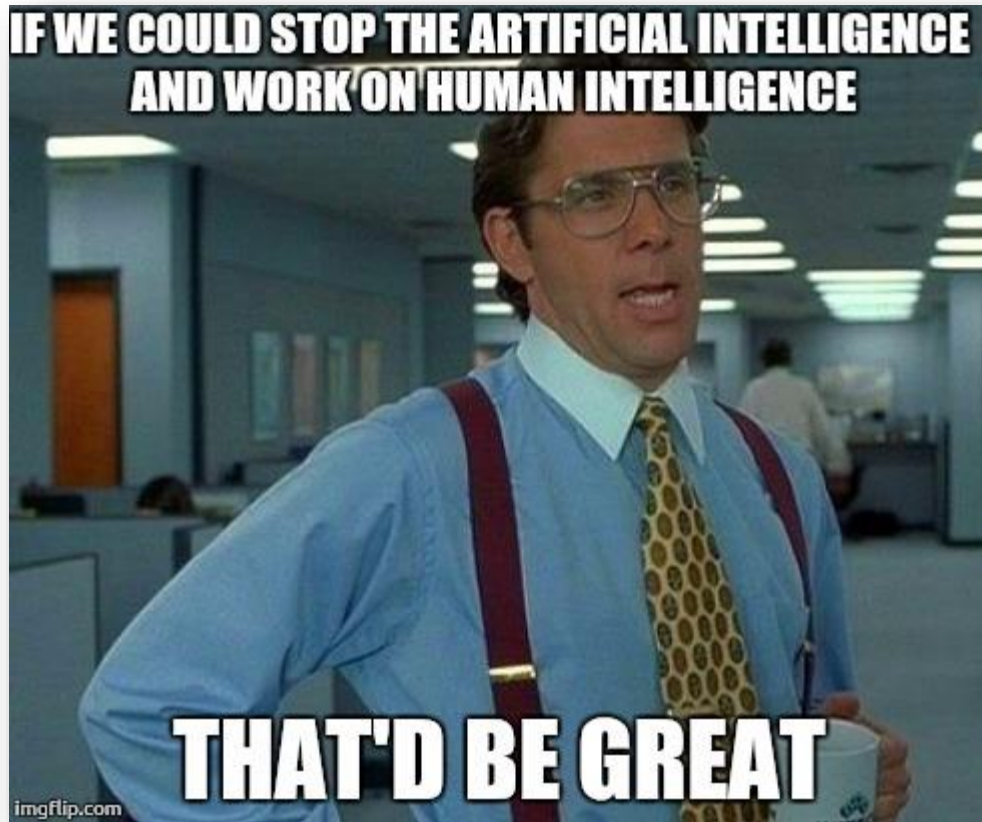


Shiny Toy Syndrome



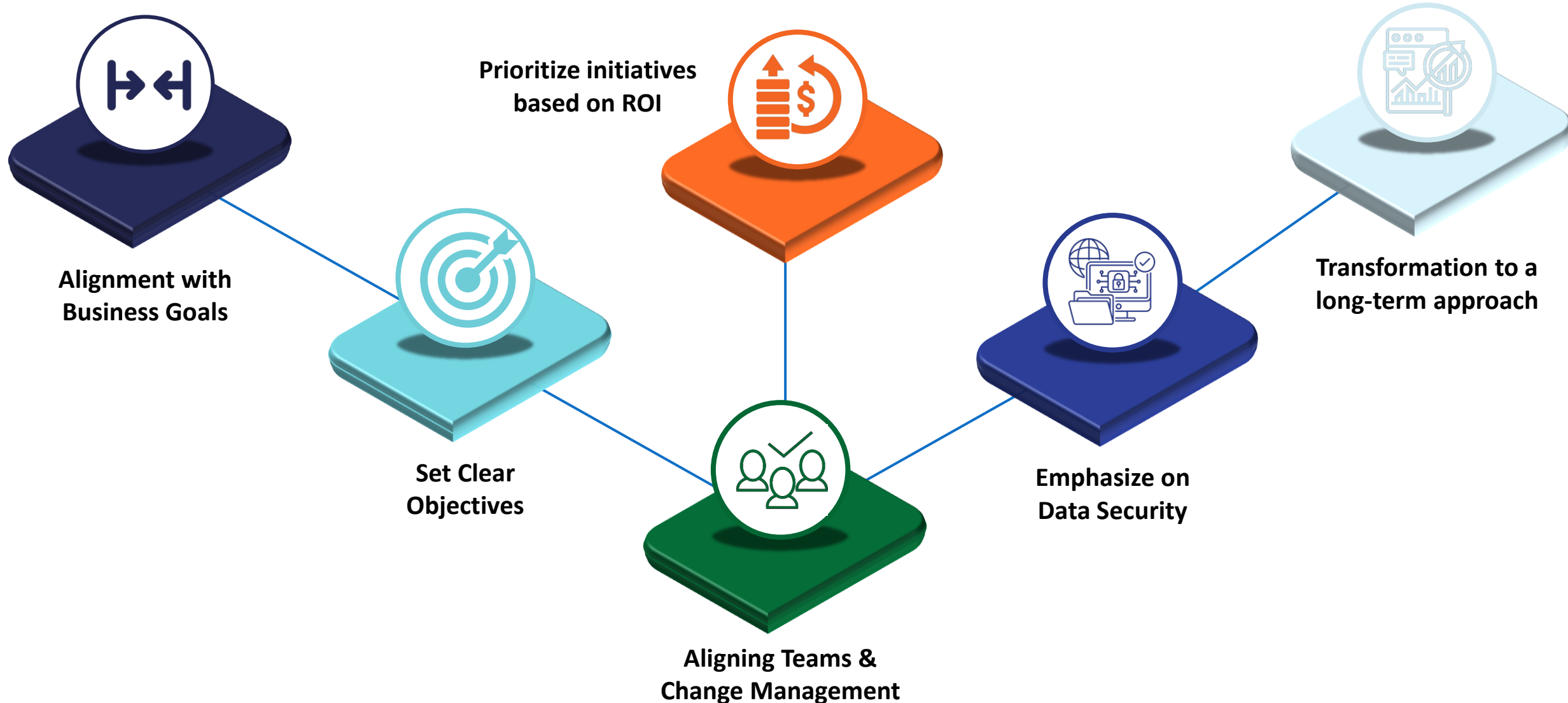
Expecting a Plug n Play Solution

# Lack of Operational Domain Expertise in Technology Partners



- Domain Expertise – How many interactions did the IT guy monitor?
- Deliver CX that matters – Relating the trends with real-life examples
- Comparing the Technology Point of View vs End User Point of View
- How to make data actionable & meaningful?

# How to successfully execute Speech Analytics?



# AI without HI: What do you think about this picture?



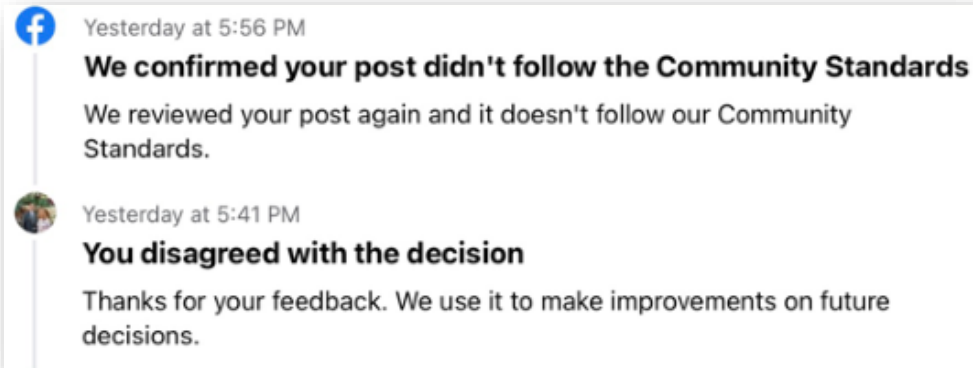
# OLD AGE

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?

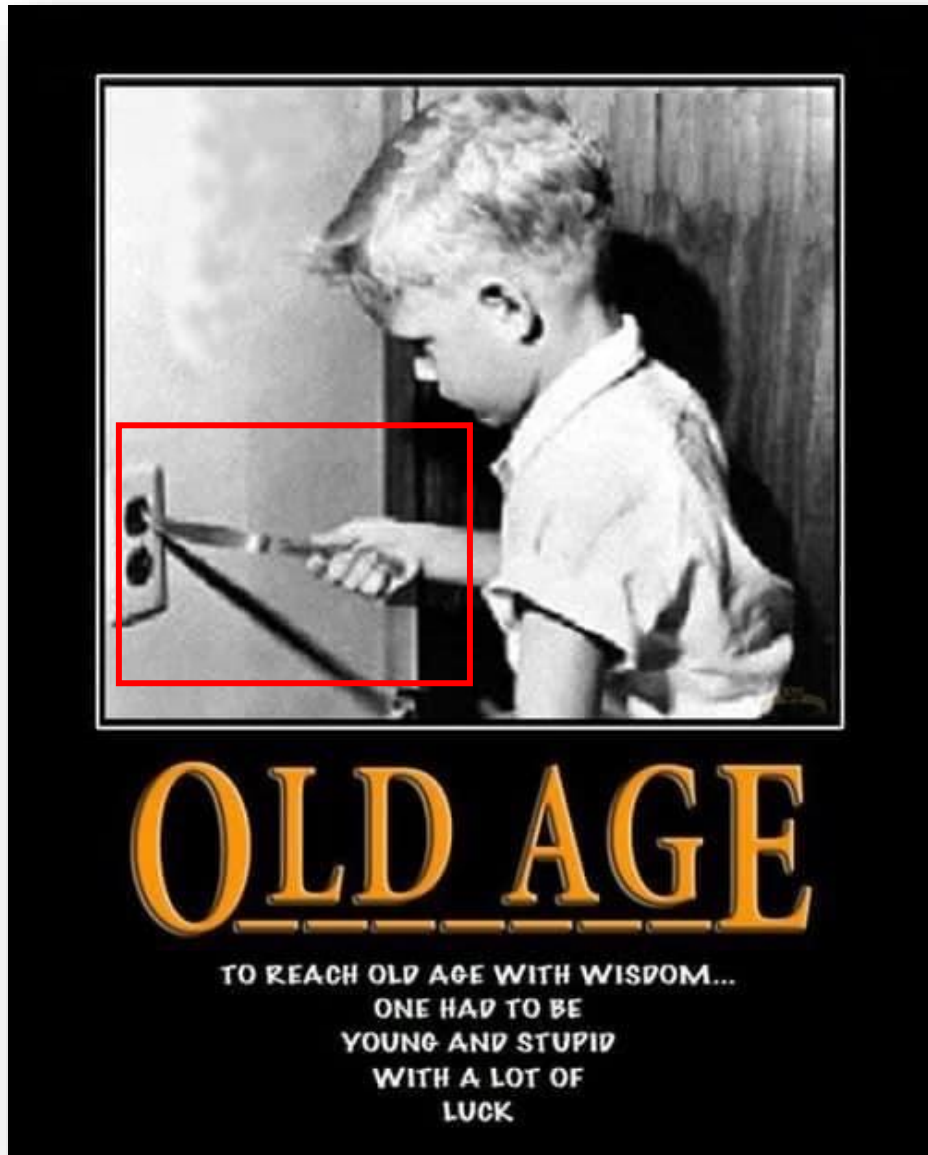


Facebook thinks it is against their community standards.



I appealed against this decision and they disagreed

# AI without HI: What do you think about this picture?



Machine Learning without Human Intelligence equals Censorship too!

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 Iyob**  
You shared this on your profile  
CLOSED · Apr 19, 2022

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

# This is fine for Facebook's Machine Learning: Because Birds don't Kill

 **Jim Iyob**  
May 15 at 5:49 PM · 🧑🏻‍🤝‍🧑🏻

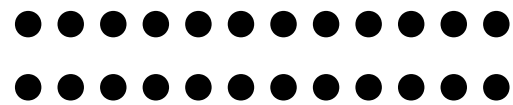
...  
You know it's a rough neighbourhood  
when you see a bird with an ankle  
monitor carrying a knife...



🤔👍 You, Shawndra Tobias, Jeanne Shuell and 9 others      1 Comment

😂 Haha      💬 Comment

If it looks like a duck,  
walks like a duck and  
quacks like a duck...



according to  
Facebook's Machine Learning,  
it is in fact, a squirrel.



**Etech**®

playing by the rules™



## 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.**

# 20 Minutes of AI



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

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) A: 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) A - 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) 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) 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)

# Putting it all together

## 1. Data



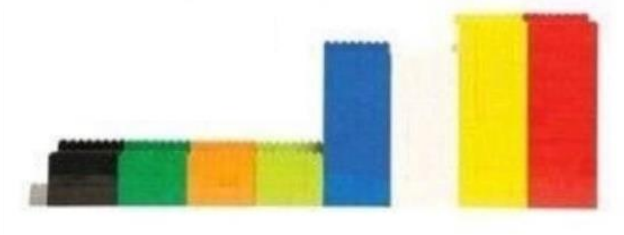
## 3. Arranged



## 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

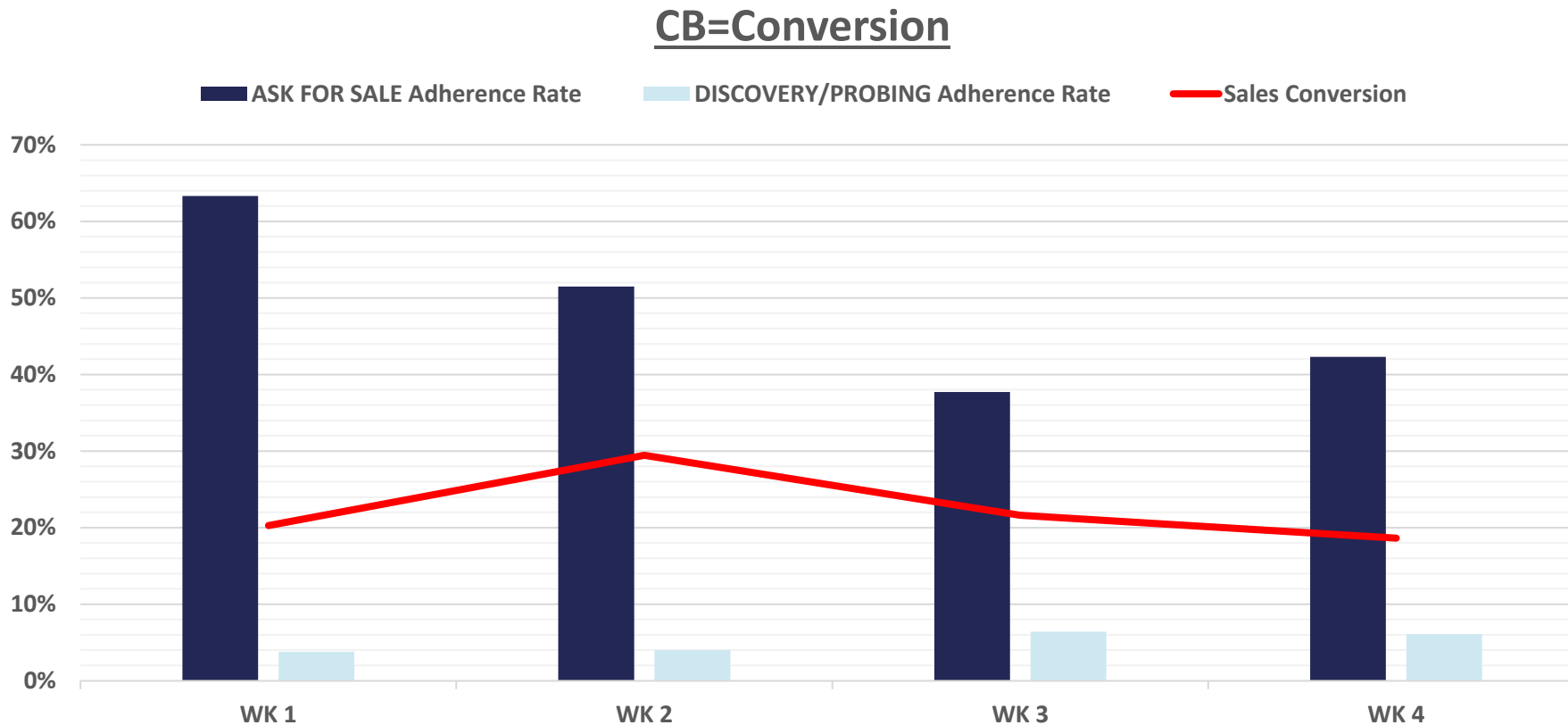
- Amount of data generated
- Online & Offline Transactions
- In kilobytes or terabytes
- Saved in records, tables, files

### Variety

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

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

Analysis of **147,962**  
Customer Interactions



# 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.

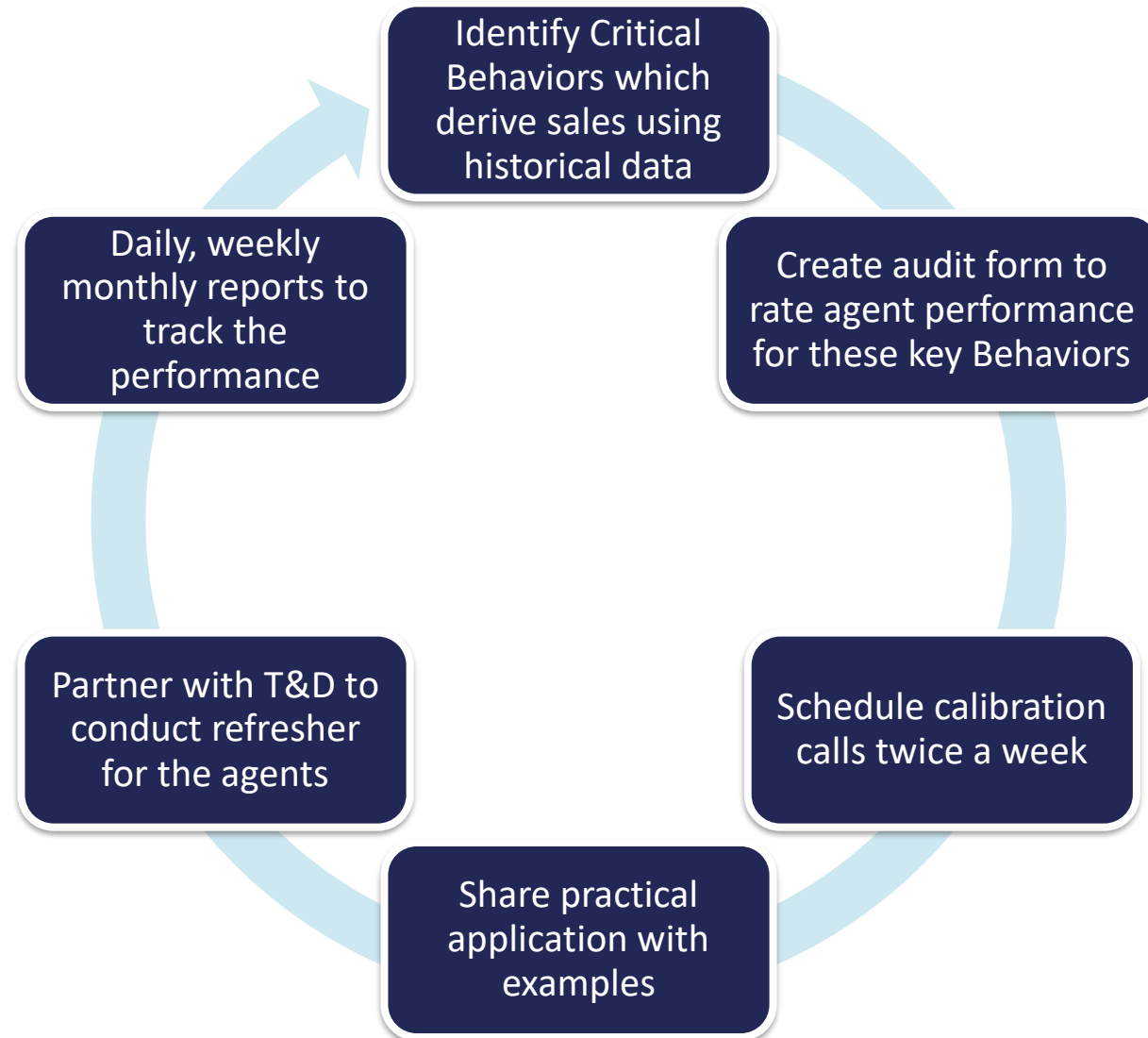
No Core Team. Onboarding Fresh Team Members.

Offshore Center. English is Second Language.

AI-Powered Speech Analytics for **Proactive** performance management:

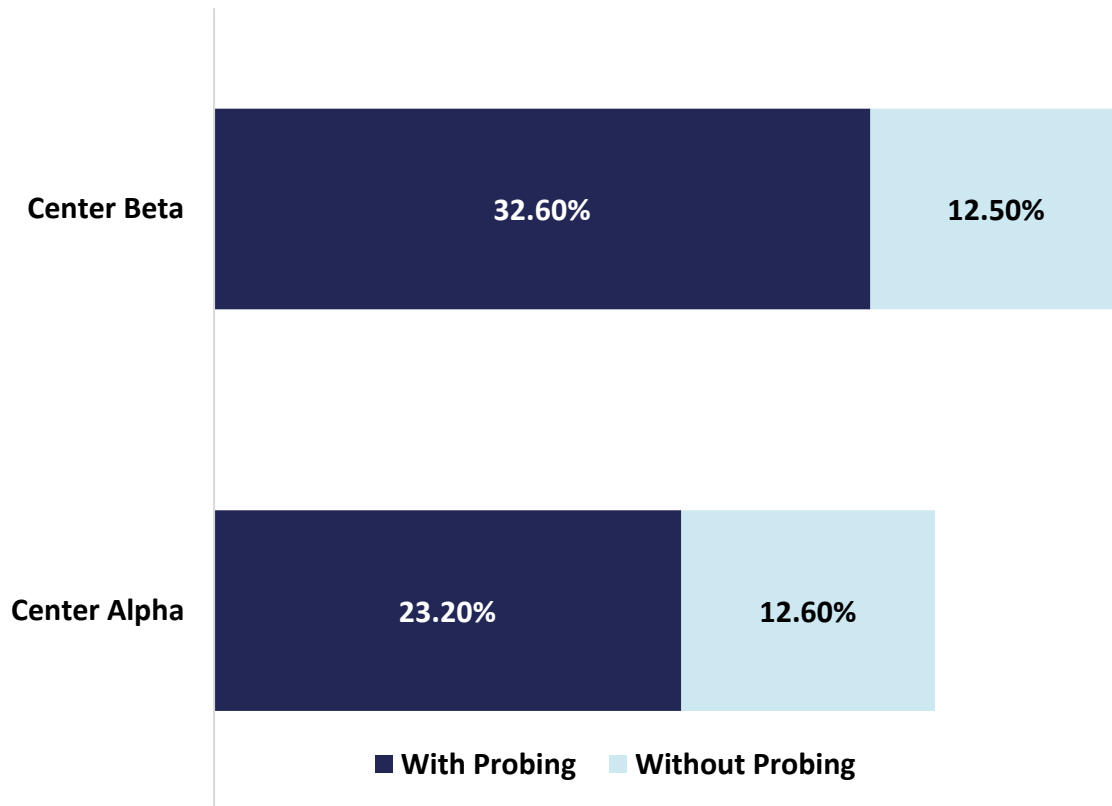
- Design Training
- Nesting
- First 30 Performance Management

# What and How?



# Correlation between Critical Behaviors and Conversion

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?

# Interaction 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

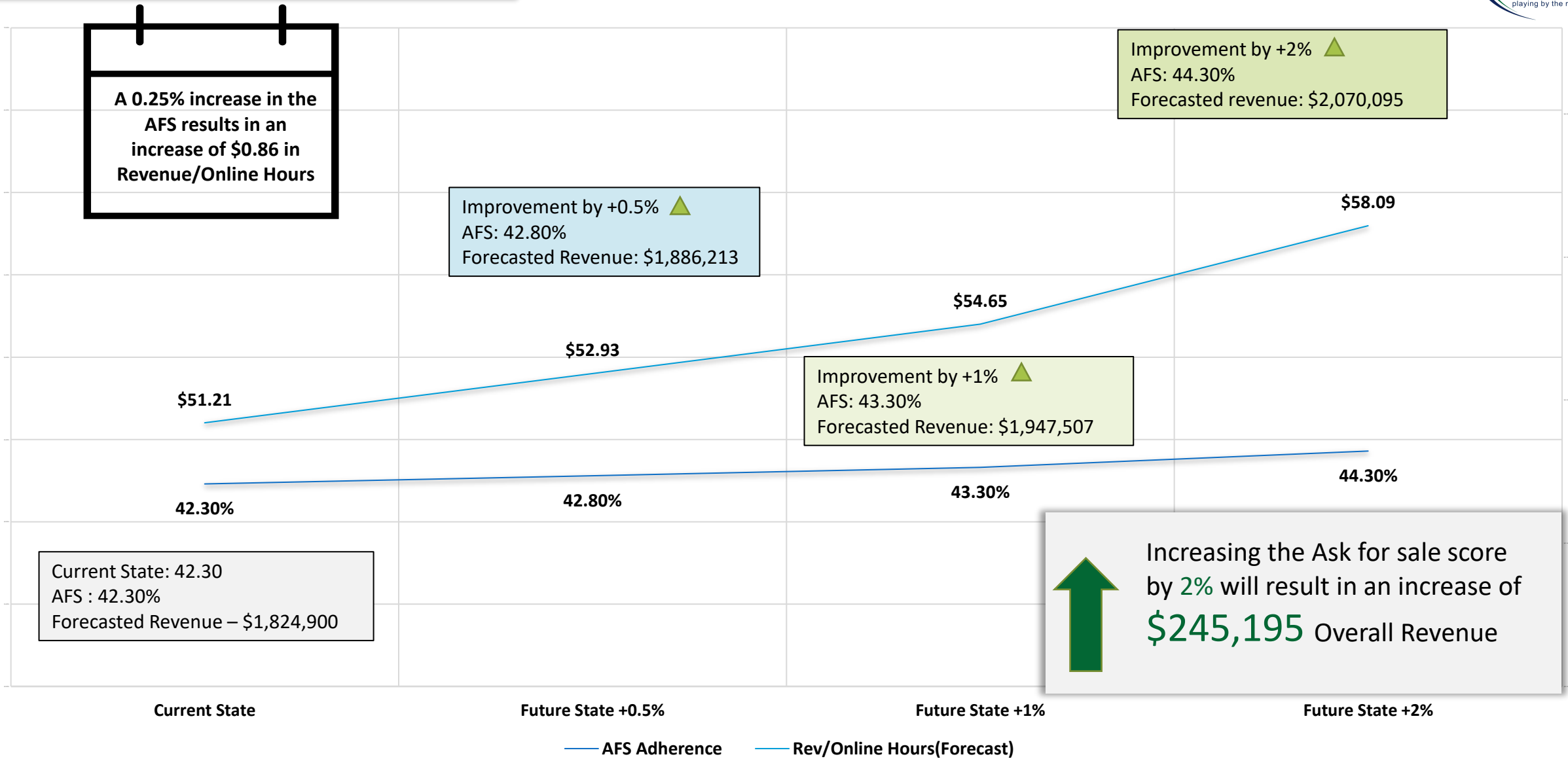
Rest of the agents do not try to overcome the objection for accessory and Protection plan

## 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

# Predicting the Future Based on Past



# Cascading Effects: The Great Resignation



## Center Alpha

The Sustained Retention Rate is 94.20%

Absence of brand experts because of less tenured team members.

High expenditure on recruiting, training and onboarding.

Struggle with Workforce Management and pays penalty on Schedule Adherence

**Leadership**

**Campaign**

**Language**

**Technology**

## Center Beta

The 90-Day Retention Rate is 97.39%

A proficient team of brand experts

Low expenditure on recruiting and onboarding.

Using Effectiveness Rating and Big Data Performance Management

# 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%**

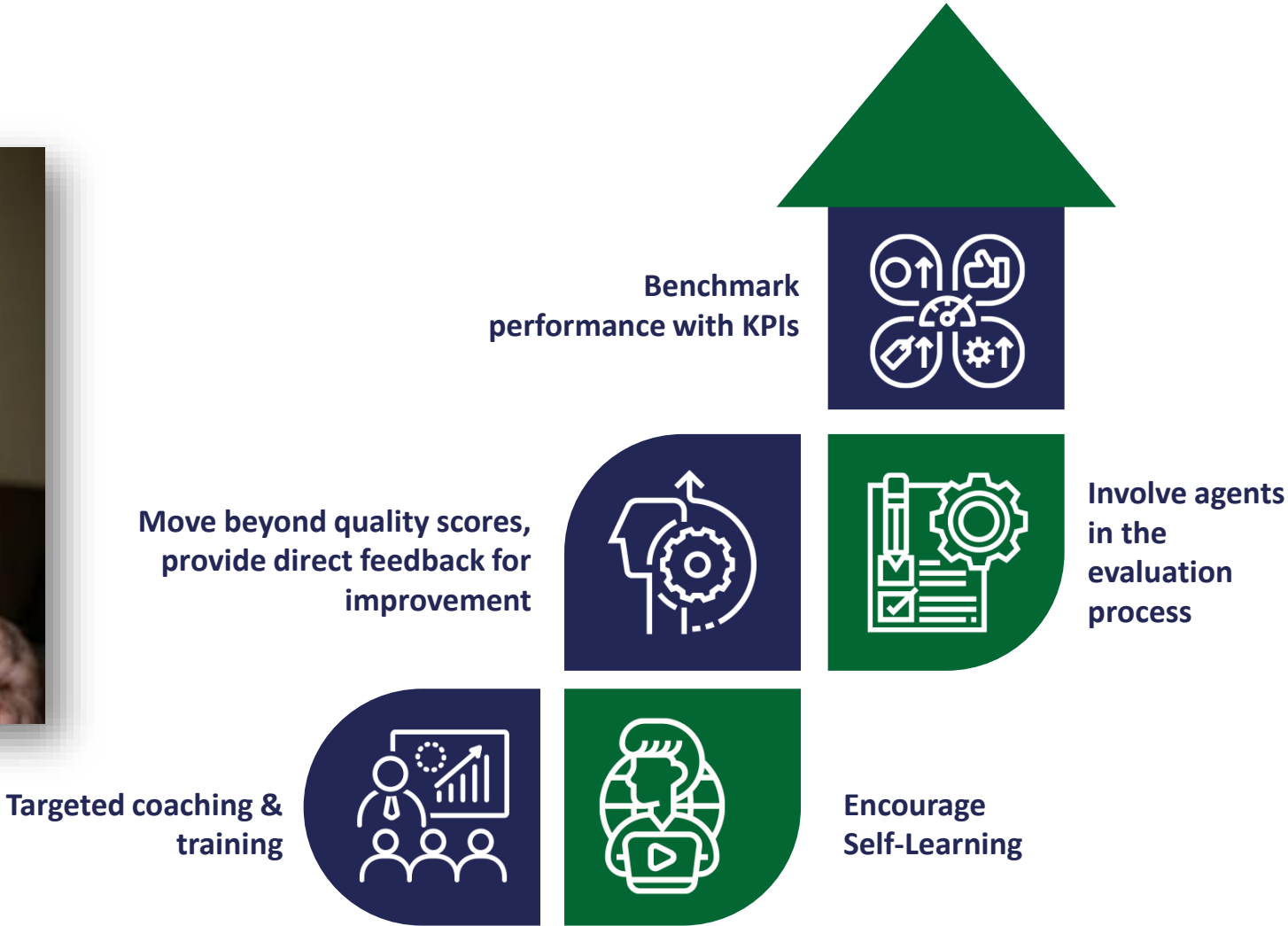


**Etech**®

playing by the rules™



# Do I really need Speech Analytics?



# Great, makes sense as a leader, 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**

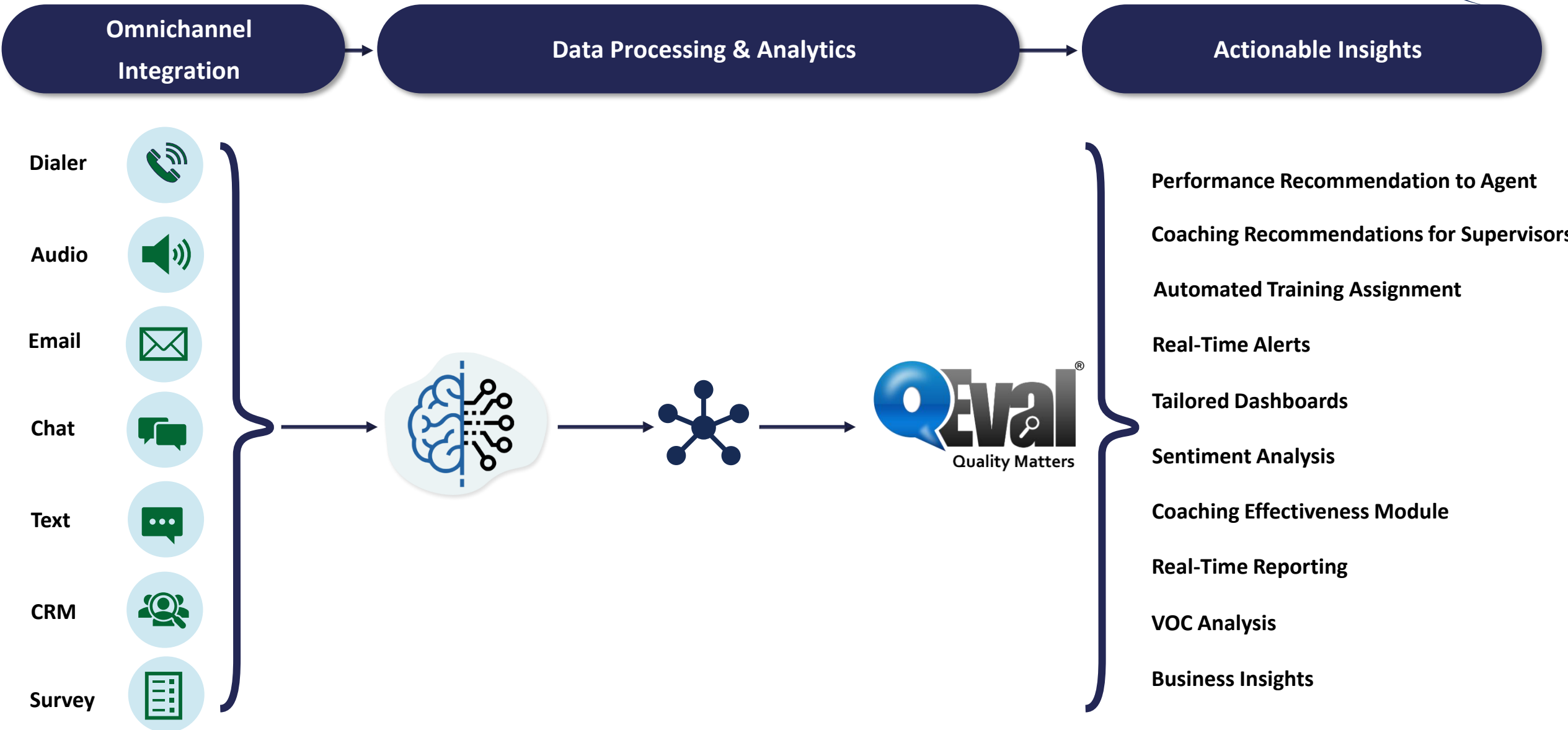


**Etech**®

playing by the rules™



# Transforming Scores to Insights



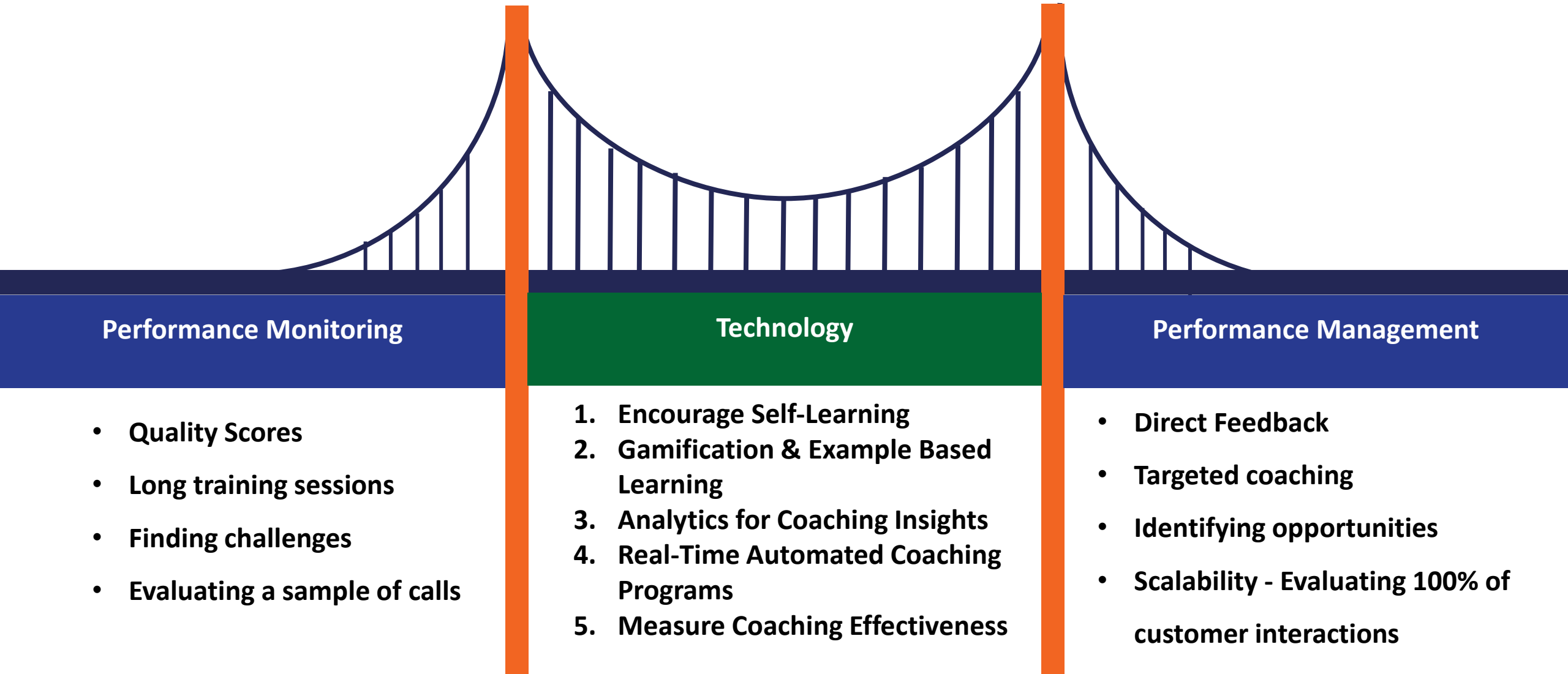


- You need FUNCTIONAL expertise, and not AI expertise to turn your insights, ACTIONABLE.
- Complex challenges are not **Reporting**.
- Complex and bad data destroys the integrity, introduces risk and promotes bad/inaccurate decision making
- Does your data tell a story, is it consumable and usable at 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.**

# Integrated Agent Coaching

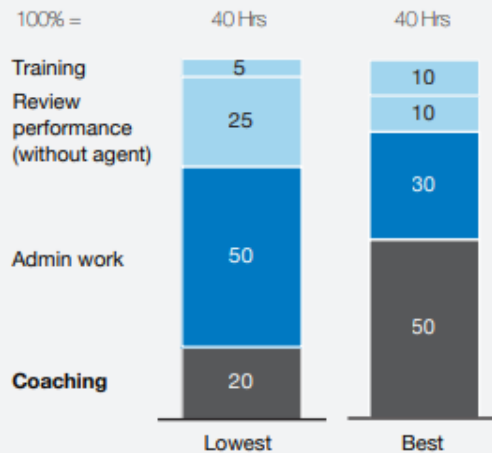


# How do I fix my retention?

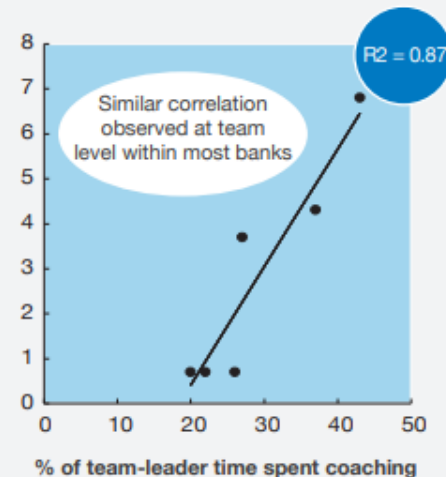
Exhibit 1

## 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 2022?

- 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](#)

# Don't Coach the Call, Coach the Skill

## Prioritizing ROI

Prioritize your initiatives based on their ROI

## Analyzing Data

Analyze your data & establish baseline measurements

## Goal Setting

Set objectives and goals for the entire organization



## Awareness

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

## 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

# Ask the Experts...



Jim Iyooob

Chief Customer Officer,  
Etech



Shawndra Tobias

VP – Customer Experience,  
Etech



Chris Basile

VP – Call Center Operations,  
Phone.com





[info@etechgs.com](mailto:info@etechgs.com)



936-371-2640