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Remarkable Customer Experiences

Etech is a Certified minority owned BPO that combines AI analytics with human expertise to improve contact center performance. Our QEval® platform transforms interaction data into coaching priorities that drive measurable results in customer satisfaction and operational efficiency.
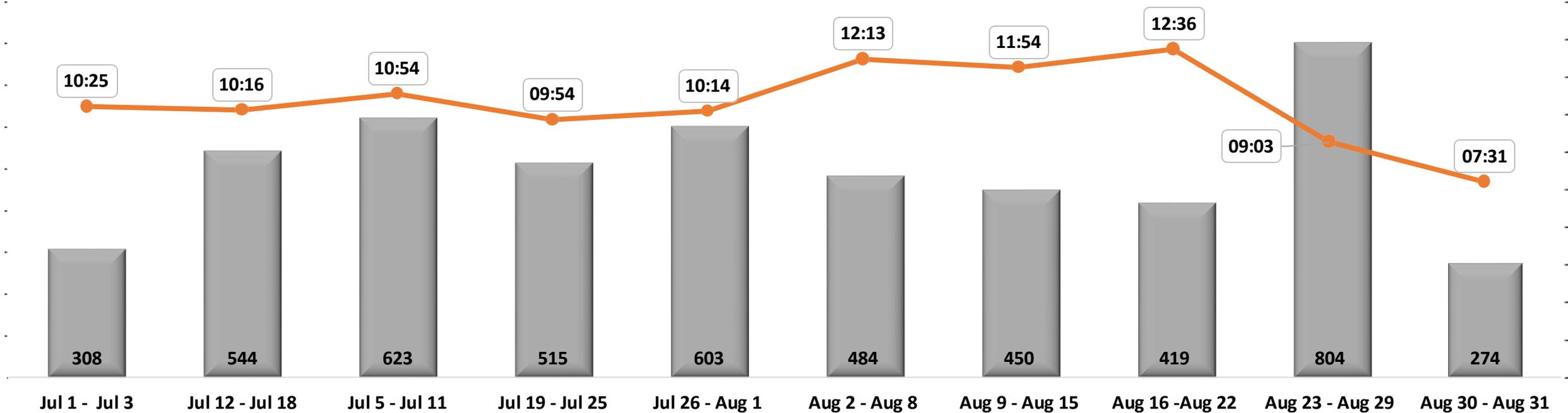
Agenda

1	Call Volume
2	AHT Analysis
3	Call Driver Analysis
4	Repeat Contact Analysis
5	Channel Switch - Analysis
6	Hold Analysis
7	CSAT Analysis
8	Percent Silence Analysis
9	Scorecard and Recommendations

Data Processing & Call Volume

Total Population	5,024
Filters Used	
Date	July 1 - August 31
Inclusions/Exclusions	N/A
Duration	N/A

Weekly Call Volume and Average Handle Time

	Jul 1 - Jul 3	Jul 12 - Jul 18	Jul 5 - Jul 11	Jul 19 - Jul 25	Jul 26 - Aug 1	Aug 2 - Aug 8	Aug 9 - Aug 15	Aug 16 -Aug 22	Aug 23 - Aug 29	Aug 30 - Aug 31
Total Calls	308	544	623	515	603	484	450	419	804	274
AHT	10:25	10:16	10:54	09:54	10:14	12:13	11:54	12:36 / 09:03		07:31

Total Calls ■ **AHT** ——
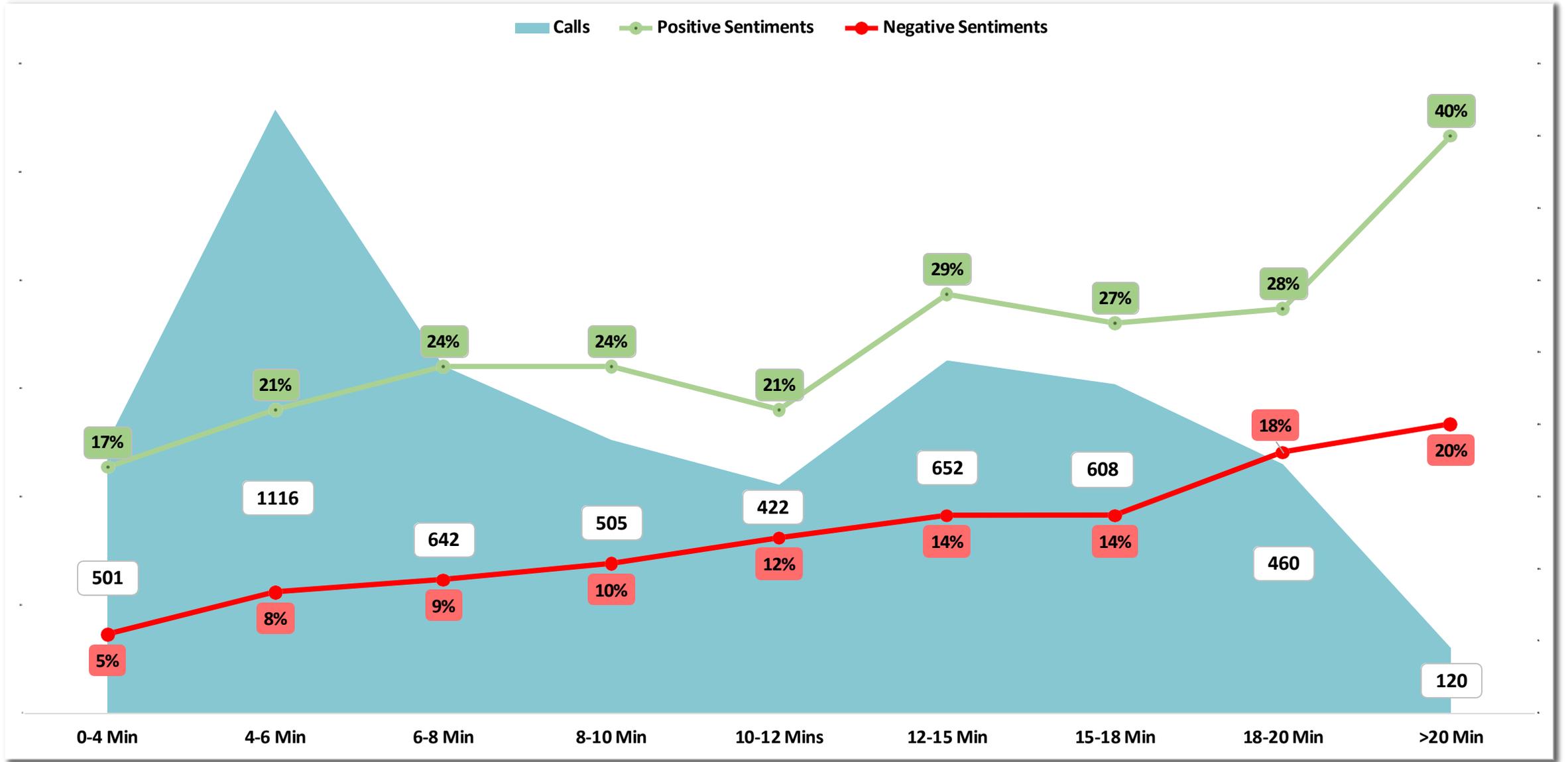
AHT Diagnostic

AHT Diagnostics– Top Call Reasons

Schedule: 0-4 Min: 2 | 4-8 Min: 12 | 8-12 Min: 7 | 12-15 Min: 2 | 16-20 Min: 7

Technical Issue: 0-4 Min: 7 | 4-8 Min: 20 | 8-12 Min: 2 | 12-15 Min: 5 | 16-20 Min: 3

New Admission: 0-4 Min: 91 | 4-8 Min: 385 | 8-12 Min: 323 | 12-15 Min: 412 | 16-20 Min: 409 | 20-25 Min: 54 | > 25 Min: 41

Enrollment Next steps: 0-4 Min: 6 | 4-8 Min: 41 | 8-12 Min: 36 | 12-15 Min: 20 | 16-20 Min: 25 | > 25 Min: 1

Modification: 0-4 Min: 2 | 4-8 Min: 30 | 8-12 Min: 15 | 12-15 Min: 13 | 16-20 Min: 20 | 20-25 Min: 2 | > 25 Min: 4

Financial Issues: 0-4 Min: 27 | 4-8 Min: 191 | 8-12 Min: 206 | 12-15 Min: 199 | 16-20 Min: 202 | > 25 Min: 3

Documentation: 0-4 Min: 14 | 4-8 Min: 102 | 8-12 Min: 67 | 12-15 Min: 58 | 16-20 Min: 63 | > 25 Min: 1

Class Information: 0-4 Min: 15 | 4-8 Min: 37 | 8-12 Min: 10 | 12-15 Min: 11 | 16-20 Min: 11 | 20-25 Min: 1

Legend: ■ 0-4 Min ■ 4-8 Min ■ 8-12 Min ■ 12-15 Min ■ 16-20 Min ■ 20-25 Min ■ > 25 Min

Etech Recommends:
Reducing non-Sales related calls when possible

Opportunity:
- Schedule inquiries
  These calls are potentially self-help via Student Portal

- Technical Support
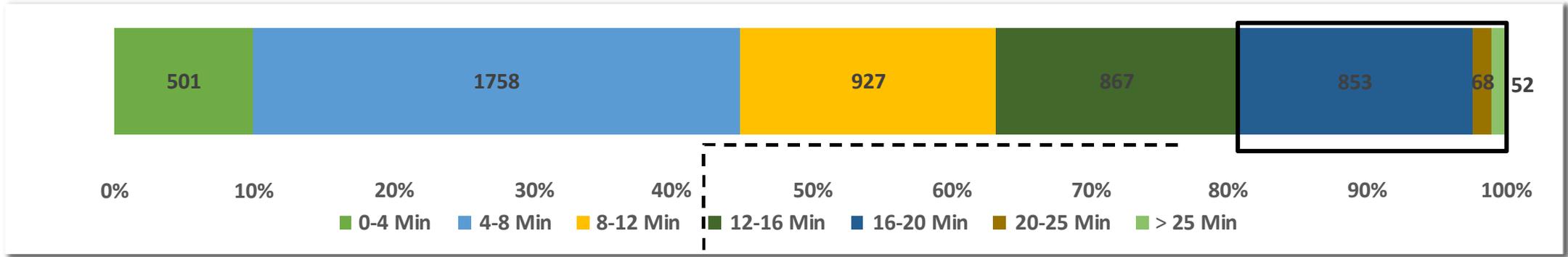 These calls should be routed to another unit when possible

Potential Revenue Impact:
47 additional sales calls
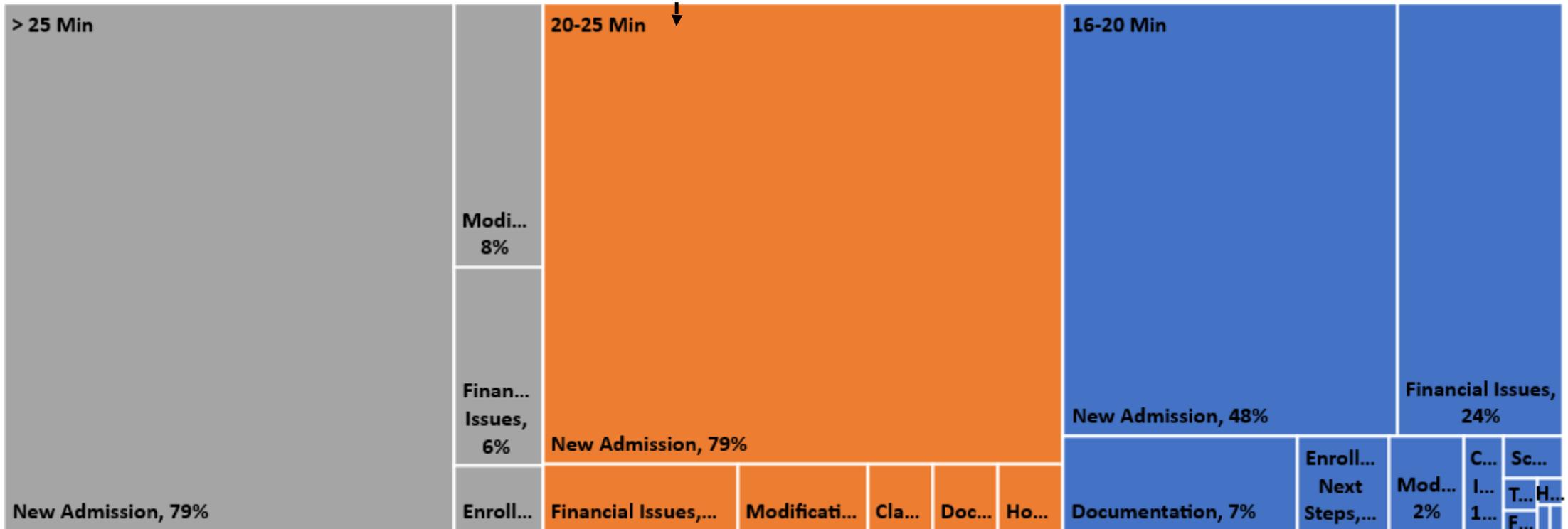10% conversion rate
$7,050,000 annual revenue

Revenue Calculator

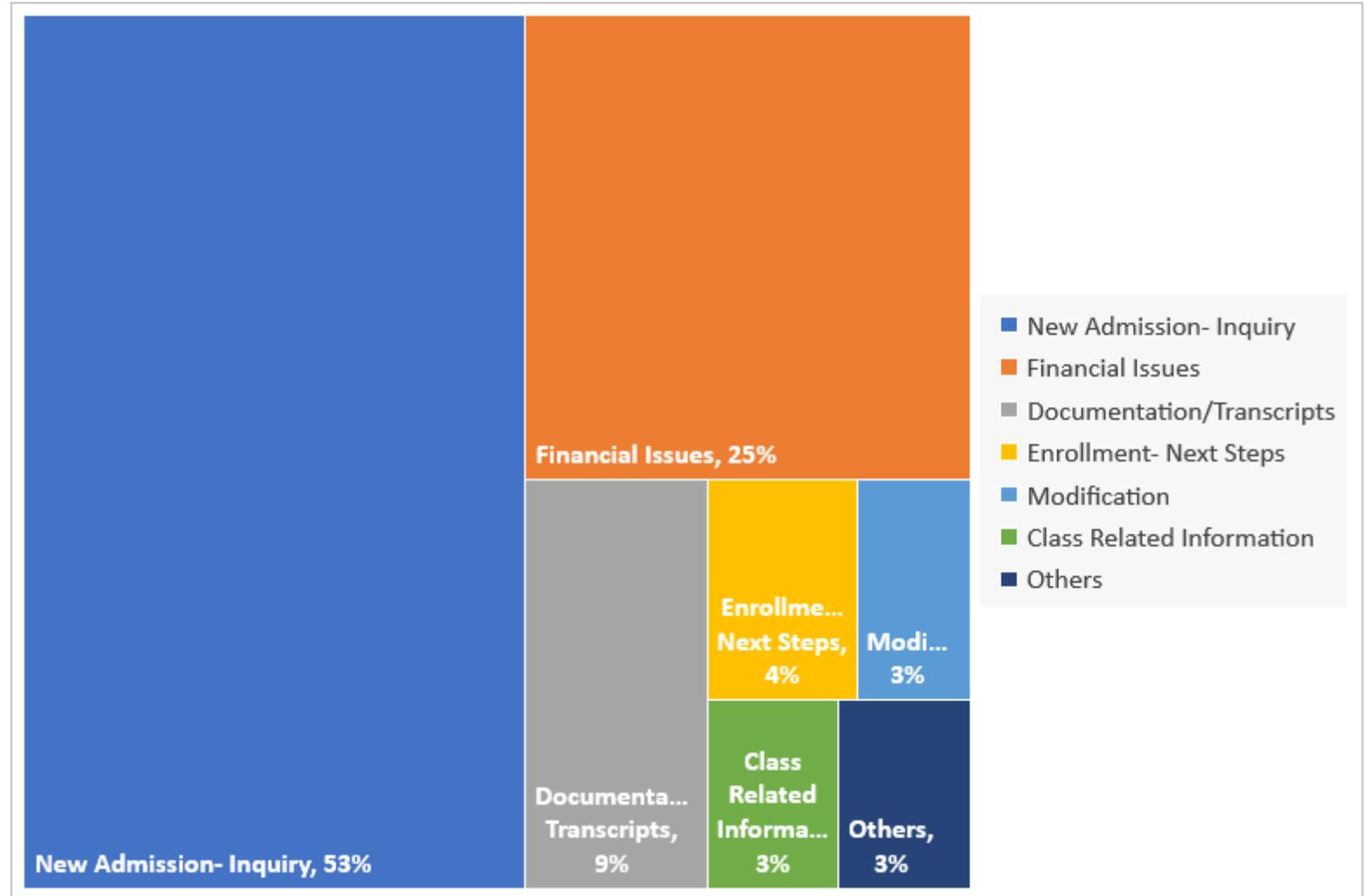# AHT Diagnostics – High AHT

Overall AHT

0-4 Min	4-8 Min	8-12 Min	12-16 Min	16-20 Min	20-25 Min	> 25 Min
501	1758	927	867	853	68	52

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

High AHT Vs Reason for Contact

> 25 Min
- New Admission, 79%
- Modi... 8%
- Finan... Issues, 6%
- Enroll...

20-25 Min
- New Admission, 79%
- Financial Issues,...
- Modificati...
- Cla...
- Doc...
- Ho...

16-20 Min
- New Admission, 48%
- Financial Issues, 24%
- Documentation, 7%
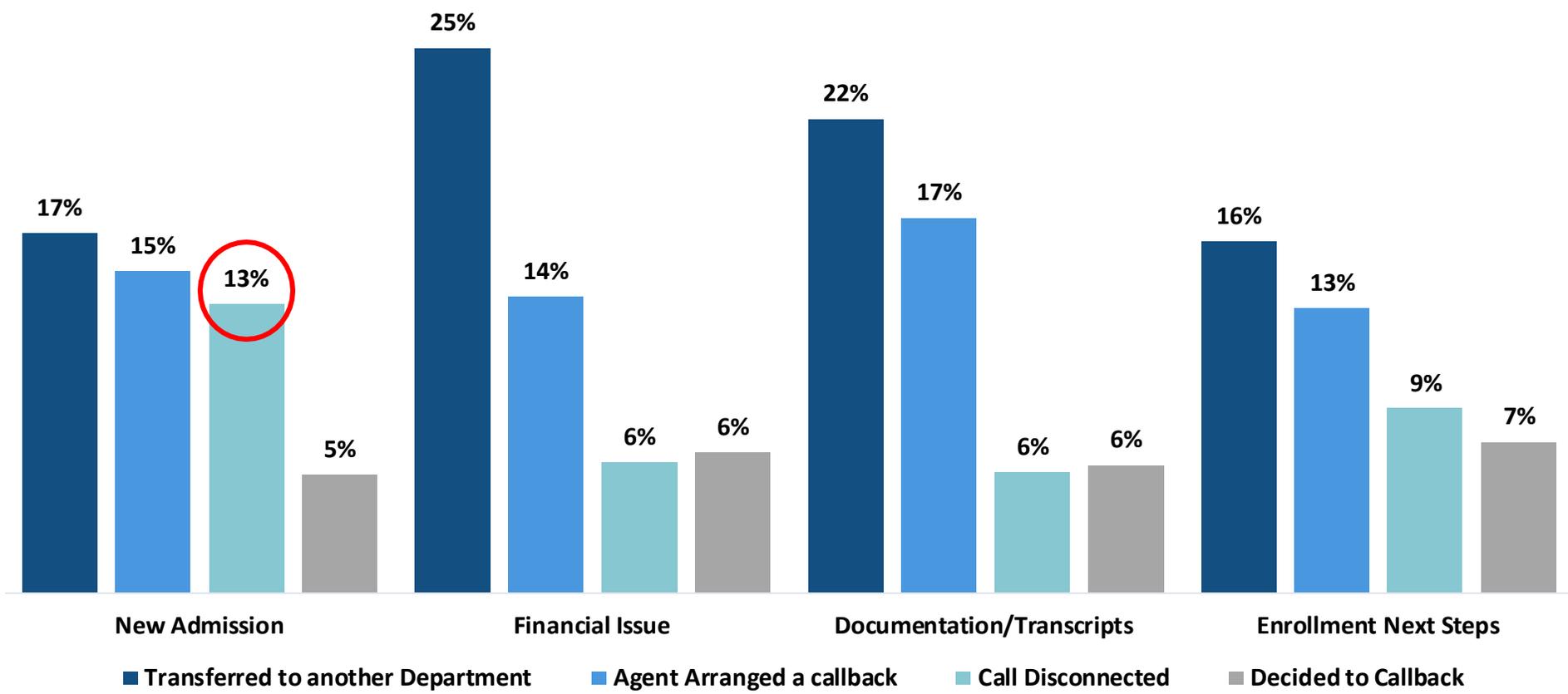- Enroll... Next Steps,...
- Mod... 2%
- C... I... 1...
- Sc...
- T... H...
- F...

Call Drivers

- We were able to determine the call drivers on 66% calls out of the total of 5,024

- The 732 (22%) of identified calls should be focused on as an area for opportunity to improve student satisfaction and reduce non-sales volume

Financial Issues, 25%

Enrollme... Next Steps, 4%

Modi... 3%

Documenta... Transcripts, 9%

Class Related Informa... 3%

Others, 3%

New Admission- Inquiry, 53%

- New Admission- Inquiry
- Financial Issues
- Documentation/Transcripts
- Enrollment- Next Steps
- Modification
- Class Related Information
- Others

No FCR Reasons: Top Call Drivers

New Admission
- 17% Transferred to another Department
- 15% Agent Arranged a callback
- 13% Call Disconnected
- 5% Decided to Callback

Financial Issue
- 25% Transferred to another Department
- 14% Agent Arranged a callback
- 6% Call Disconnected
- 6% Decided to Callback

Documentation/Transcripts
- 22% Transferred to another Department
- 17% Agent Arranged a callback
- 6% Call Disconnected
- 6% Decided to Callback

Enrollment Next Steps
- 16% Transferred to another Department
- 13% Agent Arranged a callback
- 9% Call Disconnected
- 7% Decided to Callback

Legend:
- ■ Transferred to another Department
- ■ Agent Arranged a callback
- ■ Call Disconnected
- ■ Decided to Callback

Etech Recommends:
Confirming a callback number on every call.

Opportunity:
1758 New Admission calls
- 53% of the time agents didn't confirm the student's phone number to callback.
- 13% of those calls dropped and missed opportunity to call back

Potential Revenue Impact:
229 calls dropped
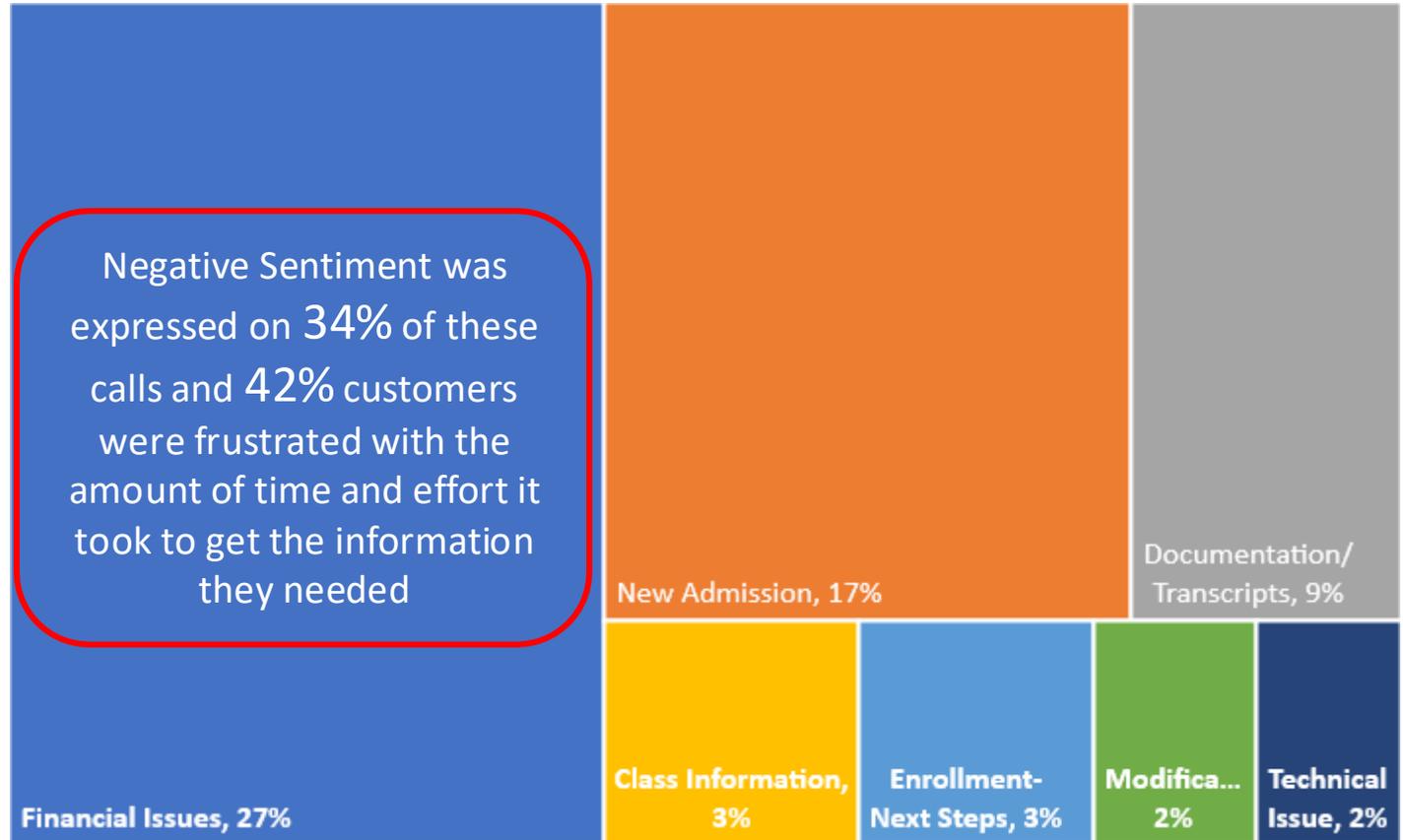10% conversion rate
$34,281,000 annual revenue

Revenue Calculator
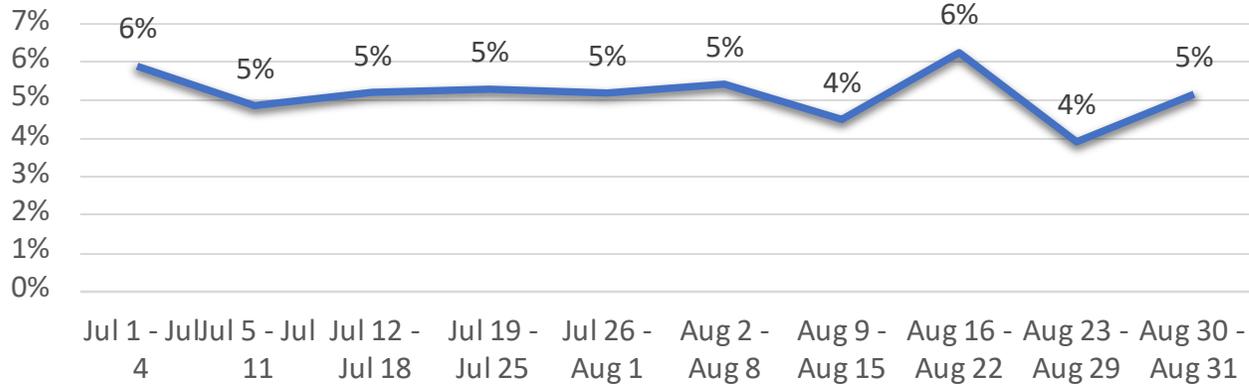
Repeat Contact Analysis

91%, 4,562
9%, 464

■ First time caller   ■ Repeat Caller
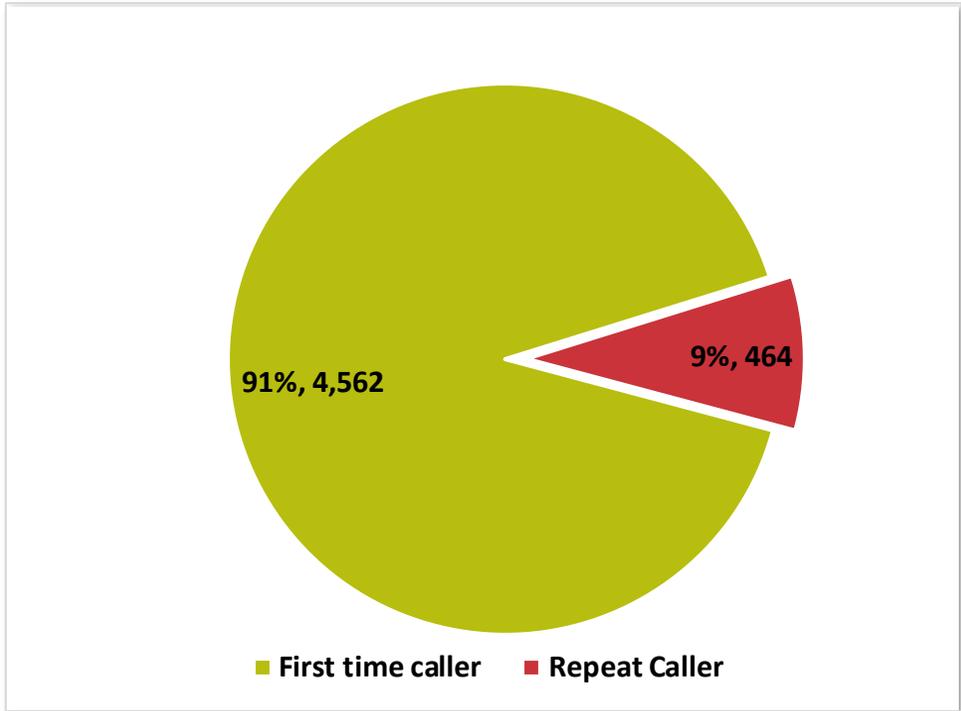
Repeat Contact VS **Call Reason**

Negative Sentiment was expressed on **34%** of these calls and **42%** customers were frustrated with the amount of time and effort it took to get the information they needed

Financial Issues, 27%

New Admission, 17%

Documentation/ Transcripts, 9%

Class Information, 3%

Enrollment-Next Steps, 3%

Modifica..., 2%

Technical Issue, 2%

Channel Switch Analysis

Identified **251 calls** from the total population wherein customers had to switch channels (from website to chat to email to call) for Issue Resolution – **5%**

Channel Switch Calls%

Chart data points:
- Jul 1 - Jul 4: 6%
- Jul 5 - Jul 11: 5%
- Jul 12 - Jul 18: 5%
- Jul 19 - Jul 25: 5%
- Jul 26 - Aug 1: 5%
- Aug 2 - Aug 8: 5%
- Aug 9 - Aug 15: 4%
- Aug 16 - Aug 22: 6%
- Aug 23 - Aug 29: 4%
- Aug 30 - Aug 31: 5%

❑ *Major Reasons for Channel Switch*

- *Unable to find information in Student Portal*
- *Online information incorrect / needs help*
- *New student needing additional information after visiting website*

Unable to find information in Student Portal

I need my ID… it wasn't that long when I looked on the website yesterday

I'm looking through my student portal… I need a letter or some type of verification… stating that I am currently enrolled in school…

Online information incorrect / needs help

I was on there two days ago… looked on the fulfill website I
realized what they did was…
singled out for September which is not what I wanted so that my graduation is postponed…

New student needing additional support after visiting website

I don't wanna wait to go to campus… found XXX and I've heard of it so I figured I'd put in my information to talk to you guys… I went on your website and I looked up the different degrees that I could get… not sure if the schedule or not but it's got like twenty-seven different classes…

Hold Analysis

Hold Calls- Bifurcation

N= 355

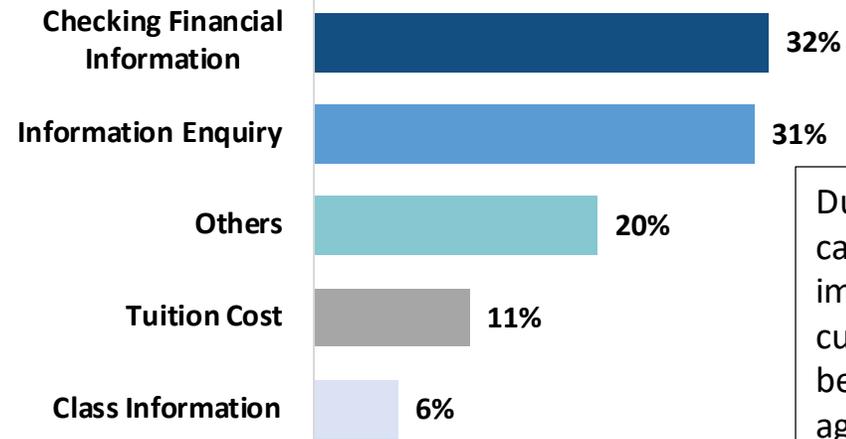|	
66	
289	
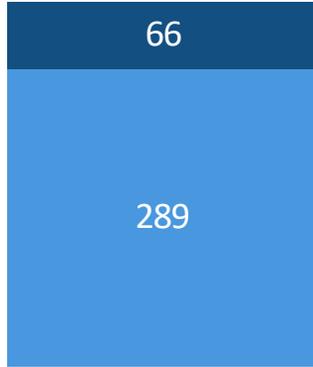
81% of calls were kept on hold to transfer to another department

- ■ On Hold to Transfer
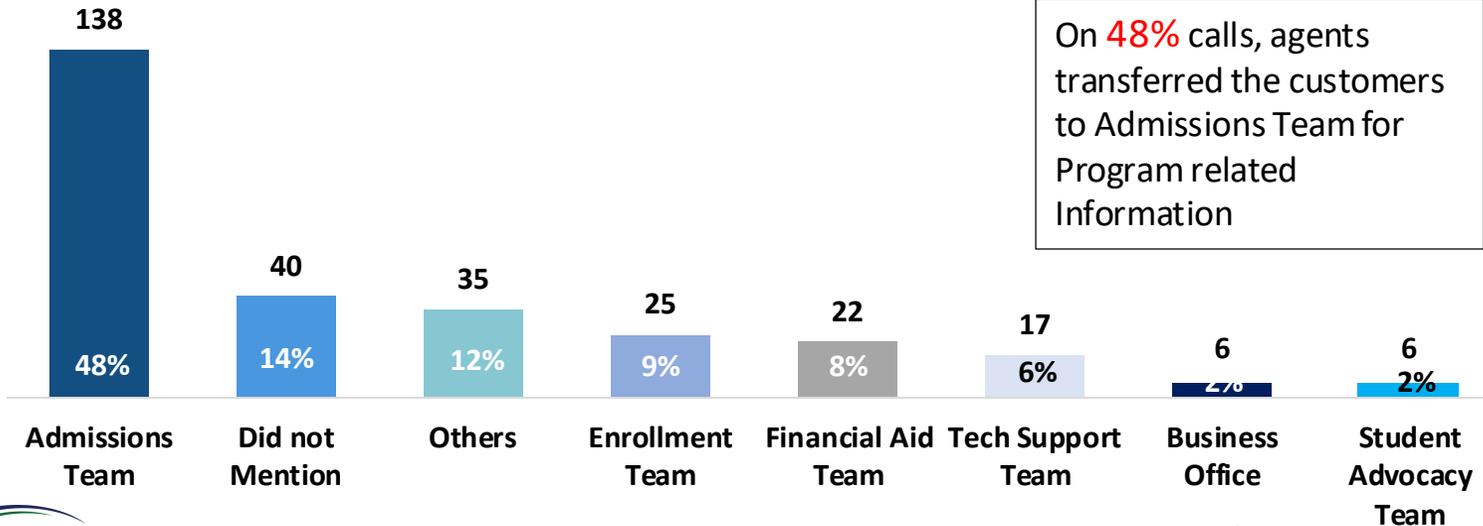- ■ On Hold to check Information

Check Information- Reasons

N= 66

Reason	Percent
Checking Financial Information	32%
Information Enquiry	31%
Others	20%
Tuition Cost	11%
Class Information	6%

Due to **Technical Issue, 66%** calls got disconnected immediately after placing the customer on hold. This might be one of the reasons that agents prefer to use mute button instead of hold

On Hold to Transfer- Department Name

N= 289

Department	Count	Percent
Admissions Team	138	48%
Did not Mention	40	14%
Others	35	12%
Enrollment Team	25	9%
Financial Aid Team	22	8%
Tech Support Team	17	6%
Business Office	6	2%
Student Advocacy Team	6	2%

On **48%** calls, agents transferred the customers to Admissions Team for Program related Information

Outliers- Transfer Calls

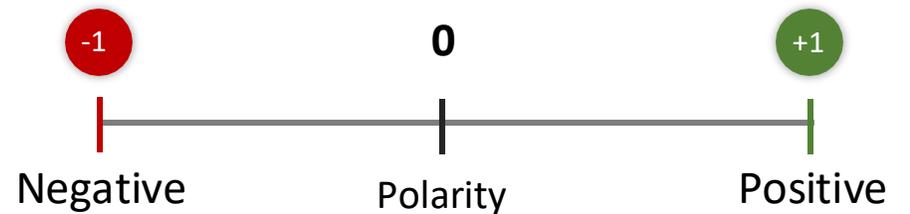| Agent Name	Total Calls	Calls Transferred	Calls Transferred%
Fernanda	31	18	58%
Celeste	24	14	58%
Destiny	21	12	57%
Jeffrey	27	13	48%
Isaiah	43	16	37%

Methodology

CSAT Analysis

Supervised Classification Model based on
Hatzivassiloglou, V. and McKeown, K.R. (1997) Model of
Sentiment Orientation.

*Eliminated "0" from results as it will introduce involuntary bias in the system where we are assuming every customer should display one or the other kind of sentiment on the call hence zero signifying an absence. In this scenario it will only boast the denominator/overall population count and skew actual CSAT scores.

● Seeded contextual training sets to maintain relevance

Keywords

Context Based Classification

Word Frequency

Intent

Colocation
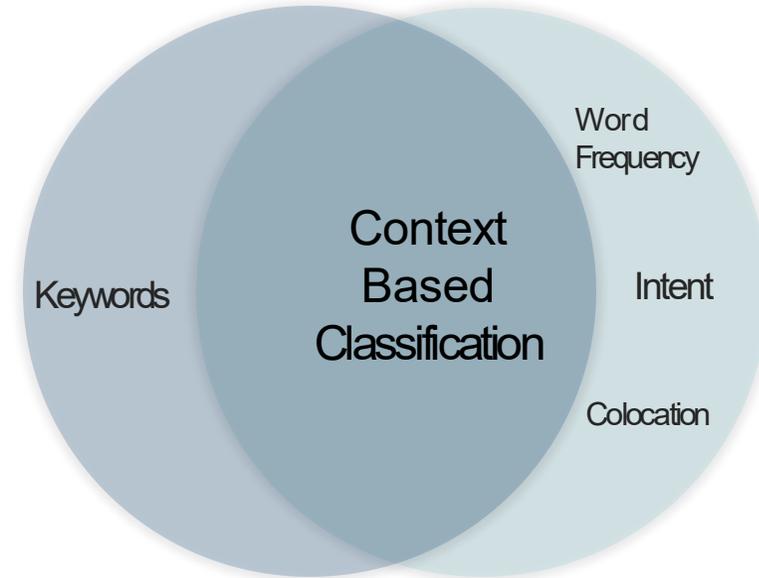
● Introduced Static Polarity of either -1 or +1 to eliminate any bias*

-1   0   +1

Negative   Polarity   Positive

CSAT Analysis

CSAT Analysis

1,450
Positive Sentiment

561
Negative Sentiment

44%   CSAT SCORE

Out of **561** calls, on **25%** calls, students showed frustration as their issue was not resolved and there was no callback/reply

Scenario 1: Team- Not Available to Assist

1: Agent: It looks like they are unavailable unfortunately they aren't in on the weekends

2: Agent: Team is unavailable and the best way to contact them to send them an email. I can't really do anything

Recommendation: Consider expanding department availability or create internal FAQ/KB

Scenario 2: Callback- Promised and Never Received

1: Customer: They'll call me back and it's been twenty-four hours, I haven't received any callback

2: Customer: They told me they could call me back, but I still didn't get a callback

Recommendation: Create a callback system that includes automated scheduling or create an outbound team

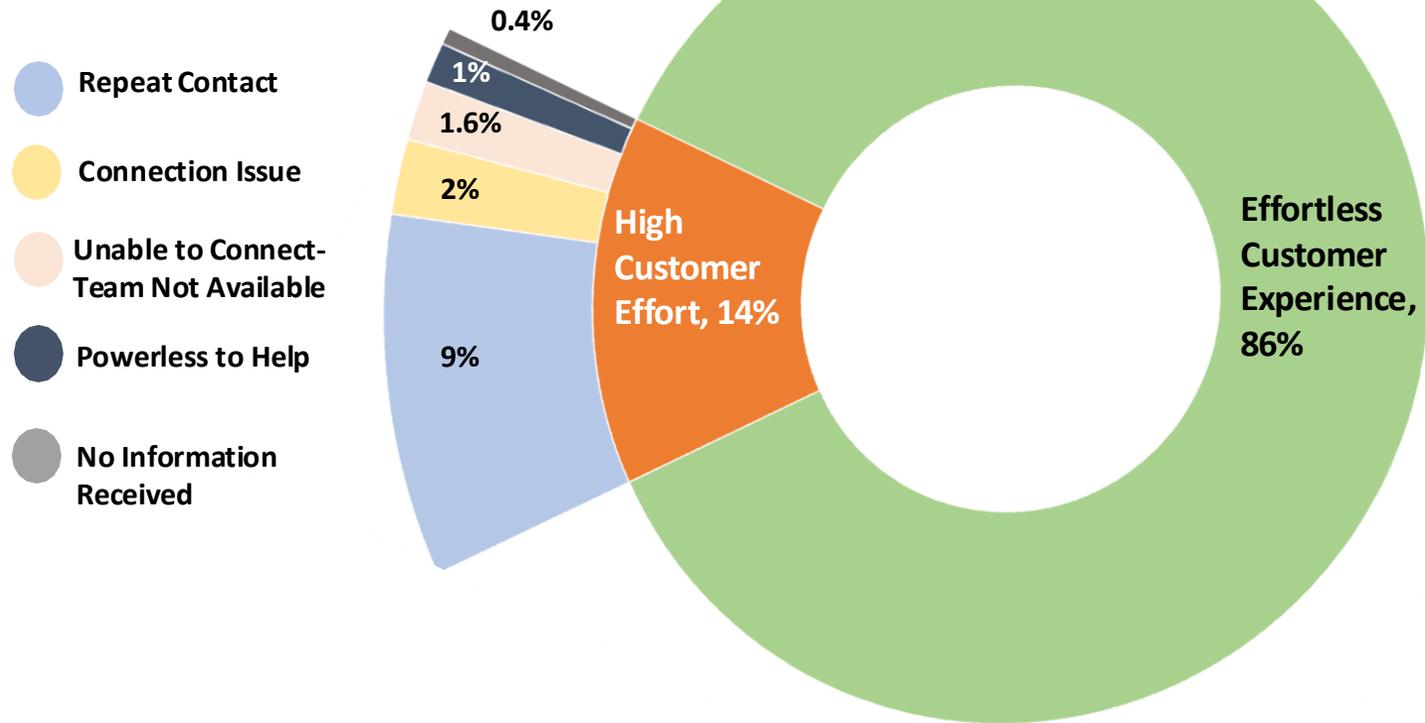### Scenario 3: Repeat Contact- Called Several Times and No Resolution

1: Customer: I spoke with several different people so the reason for my concern is that I'm supposed to be starting on August Third

2: Customer: I have called many times and every time I call; they ask me to wait and I don't want to wait anymore

Recommendation: Expand the availability for additional staff who can receive calls and monitor the callbacks scheduled are completed
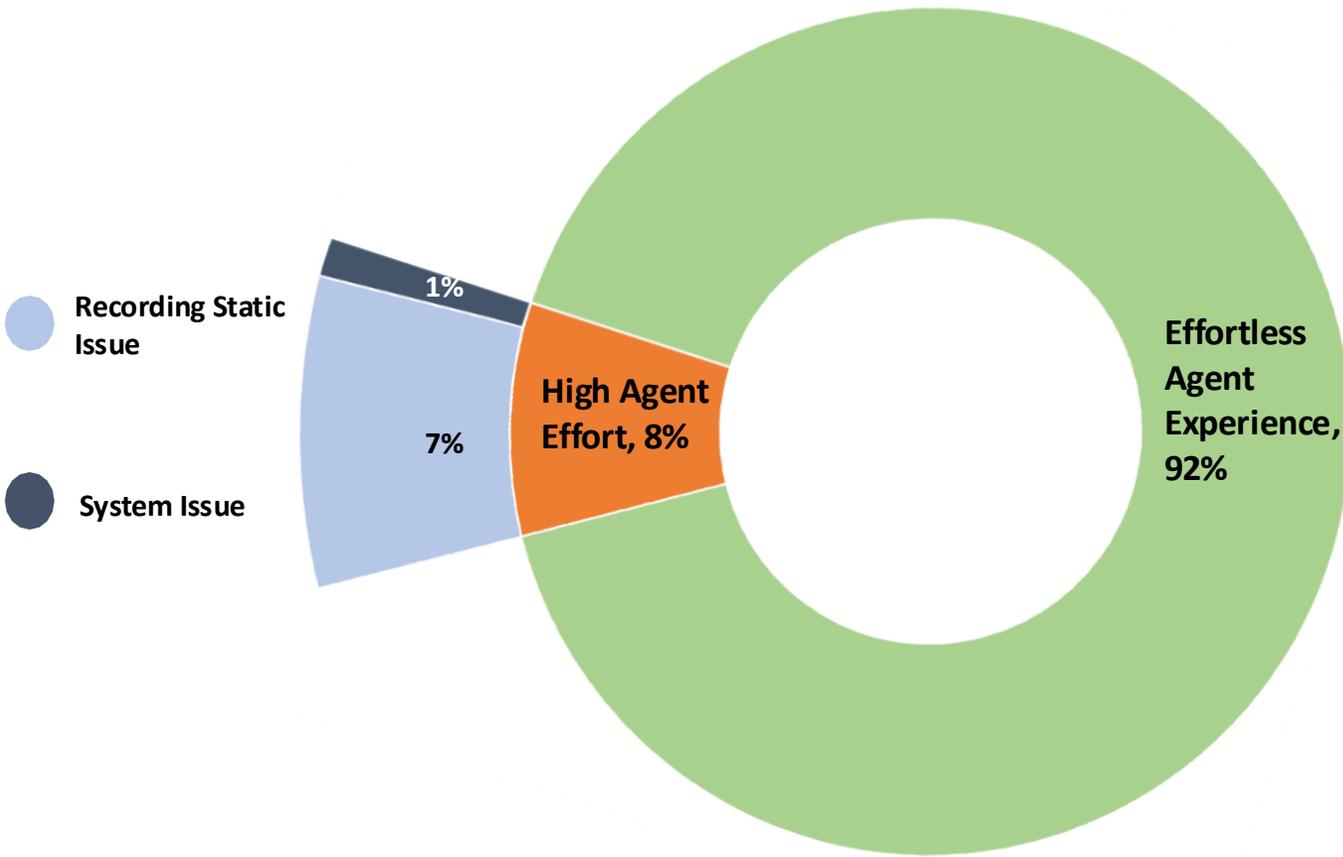
Customer Effort

N= 5024

Legend:
- Repeat Contact
- Connection Issue
- Unable to Connect-Team Not Available
- Powerless to Help
- No Information Received

0.4%
1%
1.6%
2%
High Customer Effort, 14%
9%
Effortless Customer Experience, 86%

144 calls|23% of the High Customer Effort volume came from the customers calling in regarding their Financial Issues
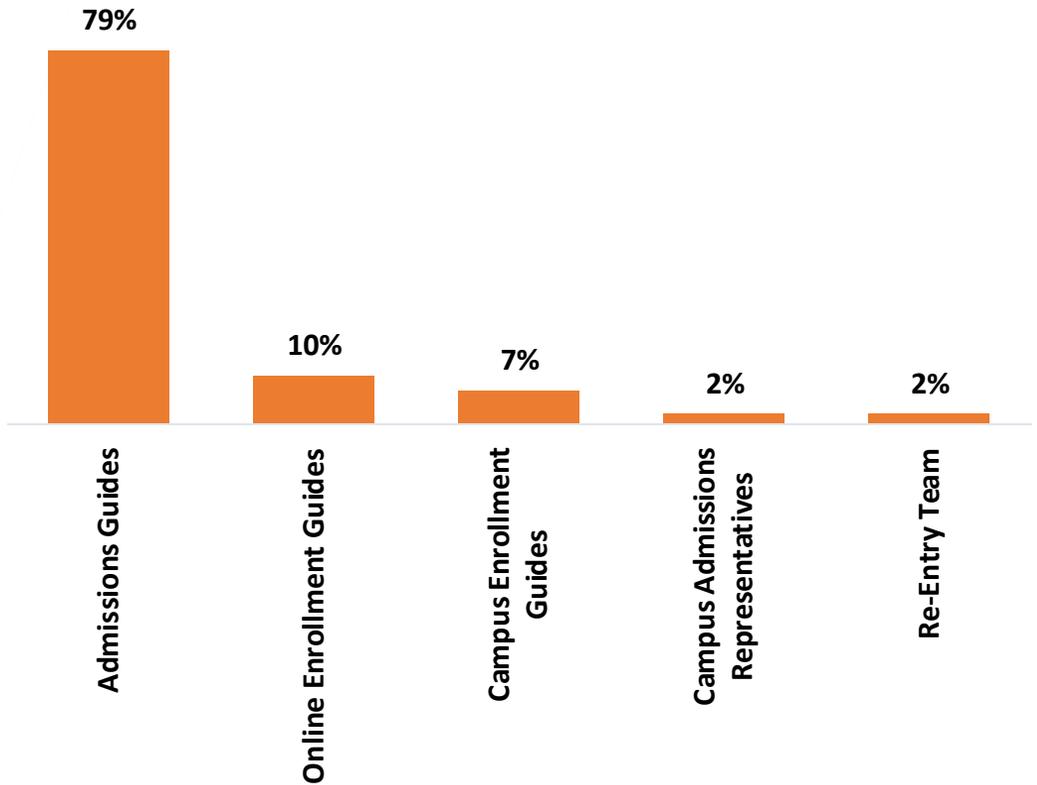
Etech Recommends:
Highlighting information regarding Scholarship, Special Benefits, FAFSA and Tuition Cost on the Student Portal

Agent Effort

Recording Static Issue

System Issue

1%

7%

High Agent Effort, 8%

Effortless Agent Experience, 92%

Agent Effort Calls – Queue Level

79% Admissions Guides

10% Online Enrollment Guides

7% Campus Enrollment Guides

2% Campus Admissions Representatives

2% Re-Entry Team

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Percent Silence Analysis

Meets Expectation Range	Needs Improvement Range	Unacceptable Range
0-46%	47%-63%	Above 63%
4,237 calls	525 calls	262 calls
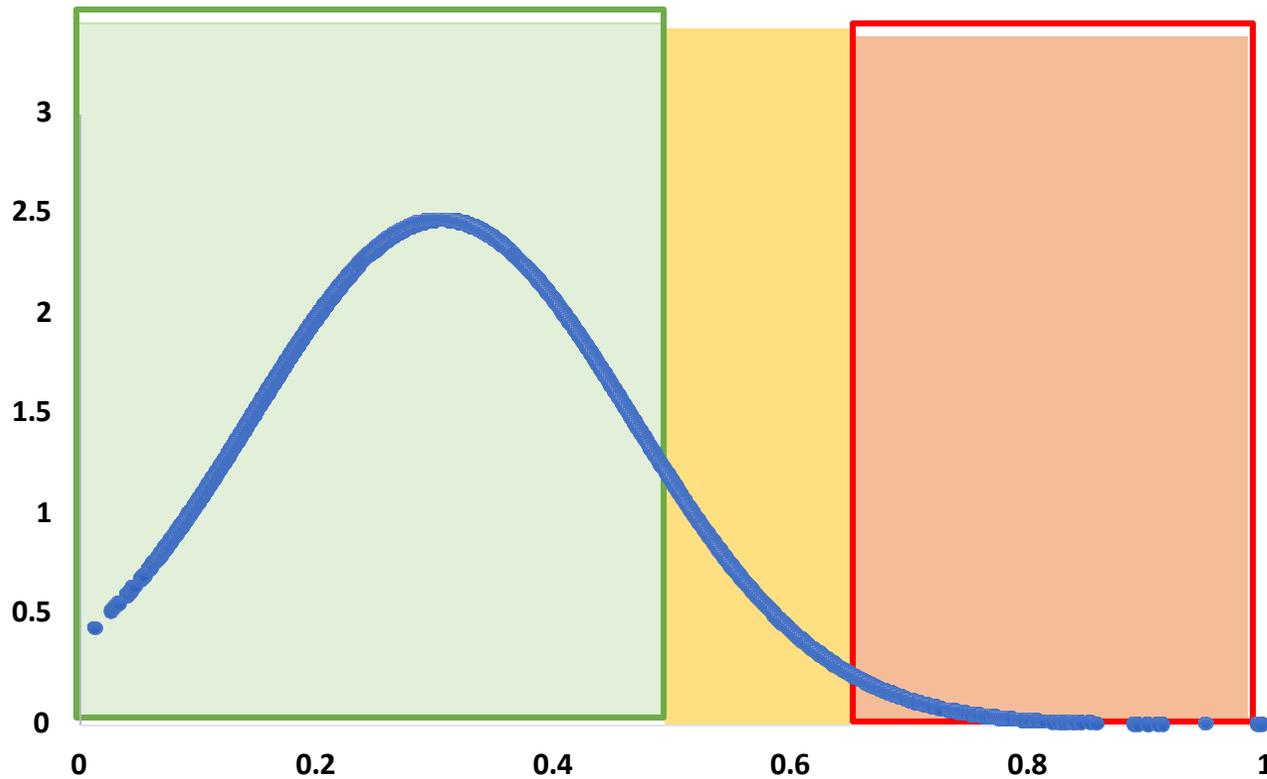
Top Offenders- Unacceptable Range

Agent Name	Total Calls	Unacceptable Range Calls	Unacceptable Range Calls%
Chris	51	21	41%
Amish	24	15	63%
Eurecan	49	15	31%
Takena	26	9	35%
Amanda	31	8	26%

Common factors

- Records research/access
- Using silence instead of placing call on hold

Recommended- Sales Scorecard

Sr. No	Parameters	Rating
	Section 1 - SETTING EXPECTATIONS	
1	Did the agent greet the student and share his/her role?	Yes, No
2	Did the agent clearly set the expectations and the purpose of this call?	Yes, No
	Section 2 - CONFIRMING DETAILS	
3	Did the agent confirm the program name with the student?	Yes, No
4	Did the agent confirm the start date with the student?	Yes, No
	Section 3 - UNDERSTANDING THE STUDENT	
5	Did the agent effectively identify the motivation of the student?	Yes, No
6	Did the agent identify student's needs and wants?	Yes, No
7	Did the agent identify what the student already knows about the program?	Yes, No
	Section 4 - BRANDING & PROVIDING SOLUTIONS	
8	Did the agent effectively add value to the program and university?	Yes, No
9	Did the agent effectively discuss the curriculum with the student?	Yes, No
10	Did the agent effectively discuss about the possible funding options?	Yes, No
	Section 5 - NEXT STEP	
11	Did the agent effectively discuss the upcoming schedule?	Yes, No
	Section 6 - BEST PRACTICES	
12	Was the agent able to effectively build rapport with the student?	Yes, No
13	Did the agent effectively probe/identify potential concerns of the address and further address it.	Yes, No
14	Did the agent schedule timely follow up?	Yes, No
15	Did the agent ask for referrals?	Yes, No
	Section 7 - COMPLIANCE	
16	Did the agent state the recording disclosure? (for OB call only)	Yes, No
17	Did the agent provide any inaccurate information or solution?	Yes, No
18	Did the agent mislead the student in any manner on the call?	Yes, No

Sales Scorecard
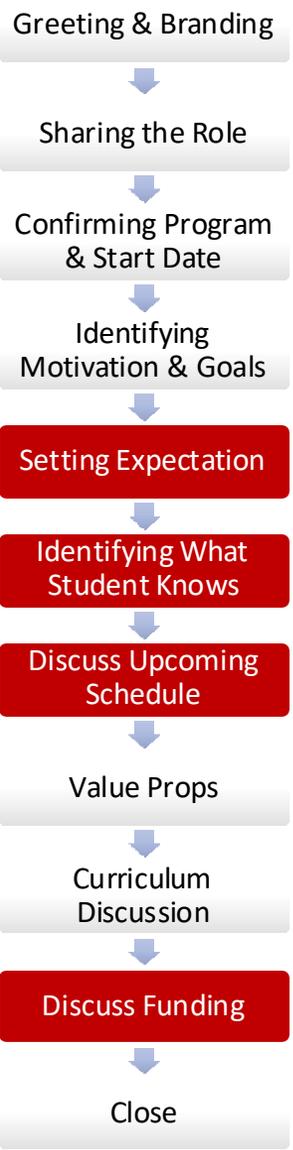
Recommended- Customer Service Scorecard

Sr. No	Parameters	Rating
1	Did the agent greet the student?	Yes, No
2	Did the agent clearly set the expectations and the purpose of this call? (if applicable)	NA, Yes, No
3	Was the student's concern(s) properly acknowledged by the agent? (if applicable)	NA, Yes, No
4	Did the agent confirm the details of the student?	Yes, No
5	Did the agent confirm the program name with the student?	Yes, No
6	Did the agent confirm the start date with the student?	Yes, No
7	Did the agent provide steps/assistance based on the student's current status/concern?	Yes, No
8	Did the agent probe effectively (if required) to find best possible solution?	NA, Yes, No
9	Was the agent able to successfully provide solution to the student's concern?	NA, Yes, No
10	Did the agent transfer the student to relevant department/person?	Yes, No
	IF ATTENDING A NEW STUDENT	
10	Did the agent create a profile for the student?	Yes, No
11	Did the agent confirm if the student is looking to student online or on-campus?	Yes, No
12	Did the agent probe to check if the student is eligible for benefits?	Yes, No
13	Did the agent perform basic admissibility check?	Yes, No
	COMPLIANCE	
14	Did the agent read the 'Consent to call' disclosure? (for new student's only)	Yes, No
15	Did the agent state the recording disclosure? (for OB call only)	Yes, No
16	Did the agent provide any inaccurate information or solution?	Yes, No
17	Did the agent mislead the student in any manner on the call?	Yes, No

Customer Service Scorecard
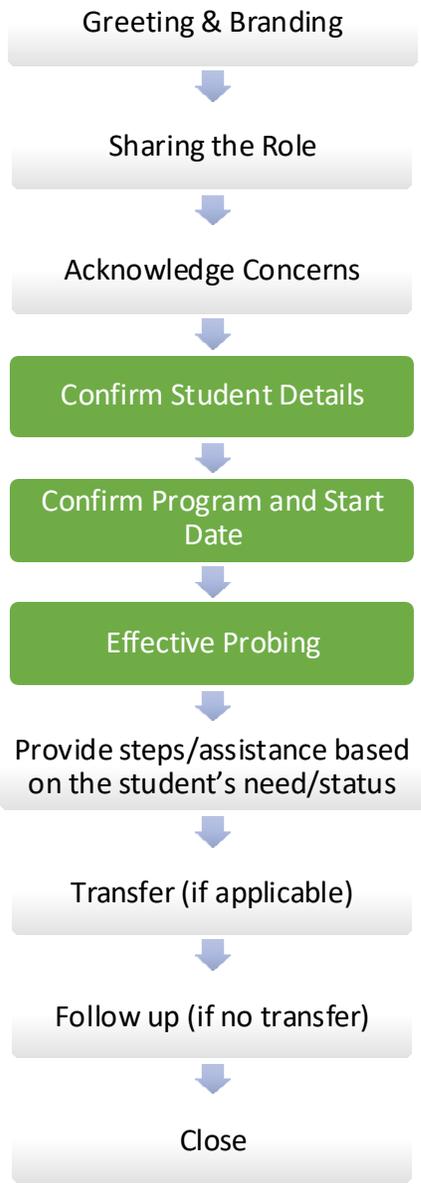
Recommended- Call Flow- Sales

Current Call Flow

Excessive Dead Air on Entire call

After sharing the role, agent should set the right expectation with the student

- Greeting & Branding
- Sharing the Role
- Confirming Program & Start Date
- Identifying Motivation & Goals
- Setting Expectation
- Identifying What Student Knows
- Discuss Upcoming Schedule
- Value Props
- Curriculum Discussion
- Discuss Funding
- Close

Before discussing the upcoming schedule, agent should discuss the curriculum and funding options

Suggested Call Flow

Effective Probing helps to understand and handle the customer issue effectively

- Greeting & Branding
- Sharing the Role
- Acknowledge Concerns
- Confirm Student Details
- Confirm Program and Start Date
- Effective Probing
- Provide steps/assistance based on the student's need/status
- Transfer (if applicable)
- Follow up (if no transfer)
- Close

No Dead Air on the Entire Call

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Recommended- Call Flow- Service

Current Call Flow

Excessive Dead Air on Entire call

Effective Probing is missing before providing any details to the customer

- Greeting & Branding
- Confirming Purpose of call (primarily for outbound)
- Acknowledge Concerns
- Provide Steps/Assistance based on the Student's need/status
- Confirm Program and Start Date
- Confirm Student Details
- Transfer (if applicable)
- Close

Agent should confirm the student and course details before providing any assistance

Suggested Call Flow

- Greeting & Branding
- Confirming Purpose of call (primarily for outbound)
- Acknowledge Concerns
- Confirm Student Details
- Confirm Program and Start Date
- Effective Probing
- Provide Steps/Assistance based on the Student's need/status
- Transfer (if applicable)
- Follow up (if no transfer)
- Close
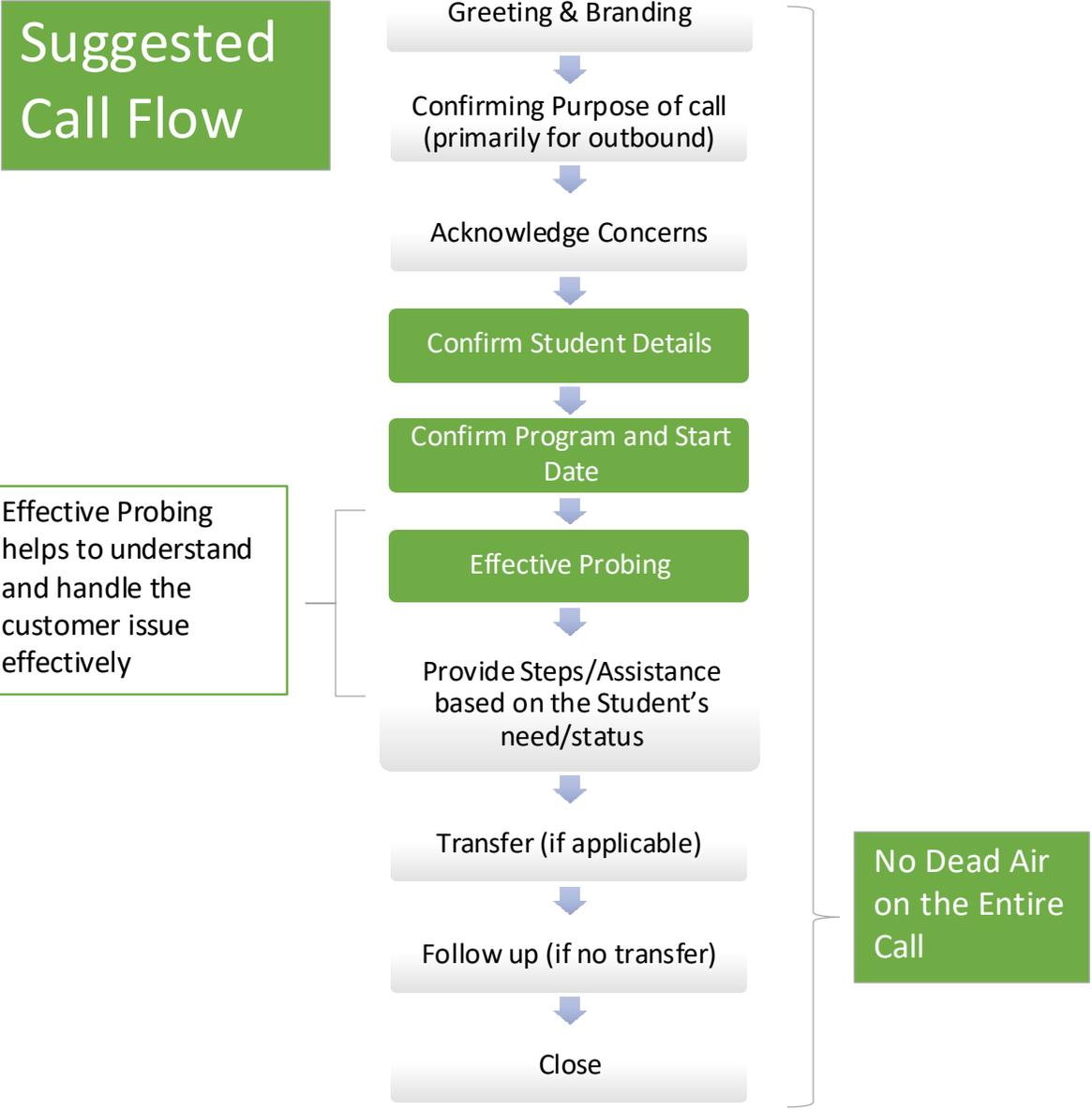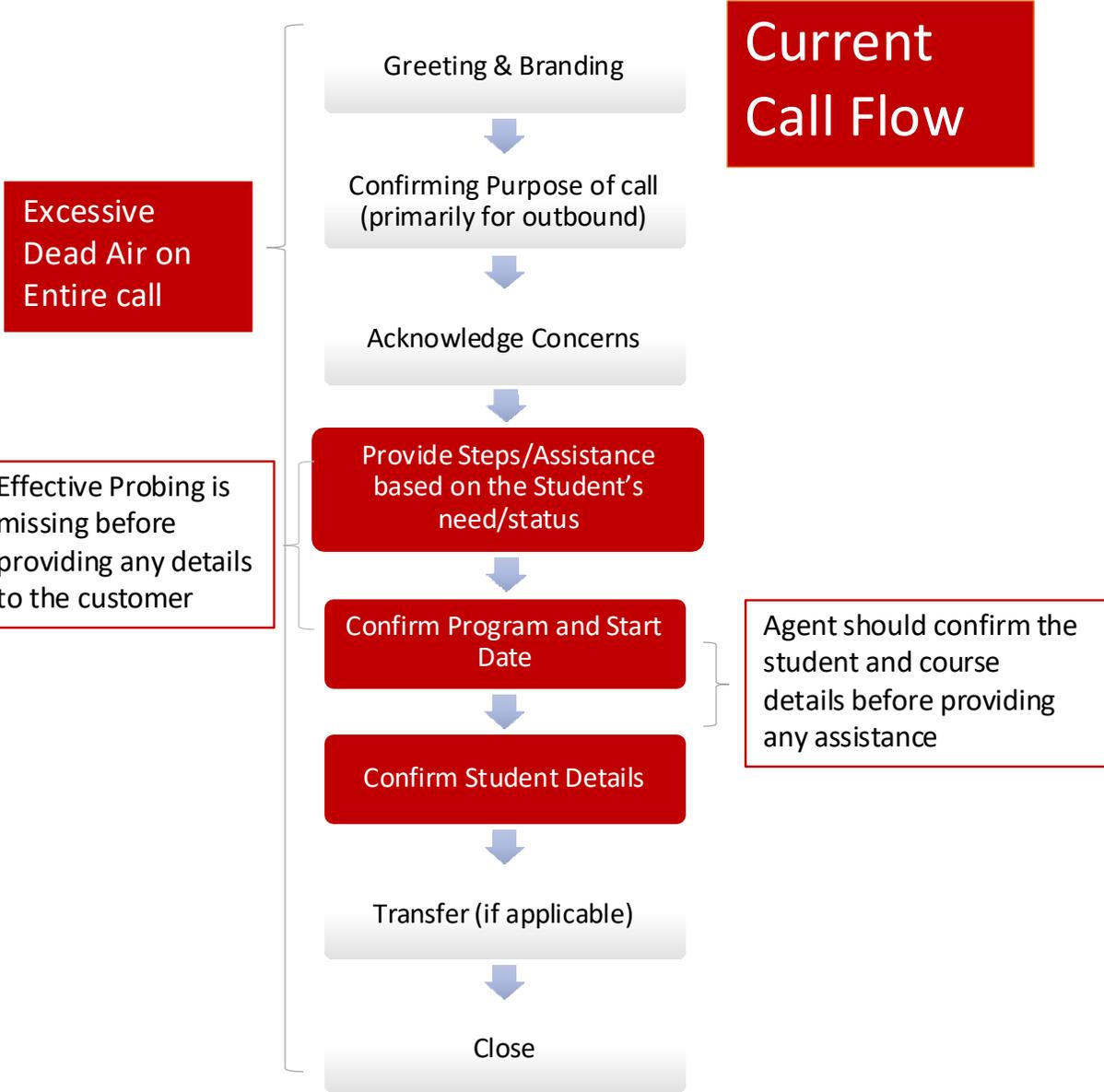
Effective Probing helps to understand and handle the customer issue effectively

No Dead Air on the Entire Call

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Recommendations- Summary

#1: Actionable Next steps

- **Focus on the outliers**
  - Look for incremental change by starting with the smaller groups of calls first, such as calls longer than 20 minutes or low value service calls being managed by the sales teams
- **Review agent system speeds and access**
  - Reduces hold/silence time on calls and improves the overall call experience
  - Improves call quality

#2: Key Performance Indicators (KPI)

- **Average Handle Time**
  - Data suggests 12-15 minute calls are optimal for building rapport and moving to the next steps of enrollment
- **Agent follow up completion and effectiveness**
  - Directly affects CSAT and excitement to complete enrollment
  - Are callbacks being properly assigned and completed in CRM
- **Call flow and suggested language adherence**
  - Recap issue at regular intervals to ensure the caller is getting questions assigned
  - Improves coaching opportunities

#3: Additional Opportunities

- **Review technology**
  - Look for more ways to add self-help forms and issue resolution to Student Portal, make sure it is updated regularly
  - Consider expanding IVR to include more routing options
- **Proactive knowledgebase for Agents**
  - Centralizes answers for commonly asked questions related to call drivers
  - Improves the Agent Experience with education and removes powerless to help reasons
- **Team alignments**
  - Admissions Guides - Increases opportunities for dropped calls during transfers and improves the experience by reducing the number of people students speak to
    - Expand use as support team
    - Possible realignment to other teams
  - Expand Department Hours of Operation – Improves CSAT and Student Experience
    - Service teams should be available as often as sales teams are

Jim Iyoob
President –ETS Labs/
Chief Revenue Officer –Etech

Thank You!

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To make a remarkable difference for each other, our customers, and within our communities.