



YOUR TRUSTED ADVISOR FOR

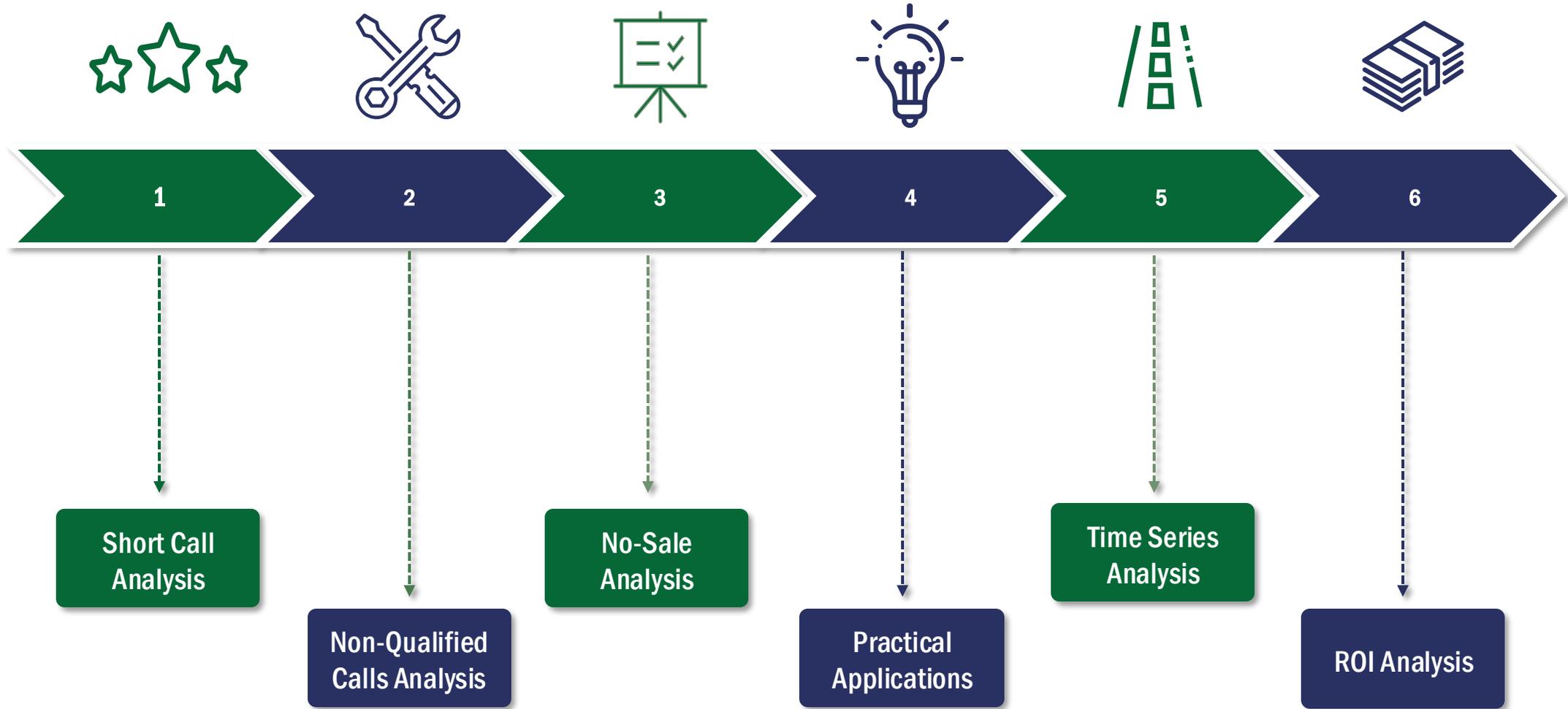
Remarkable Customer Experiences

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.

AI Business Insights

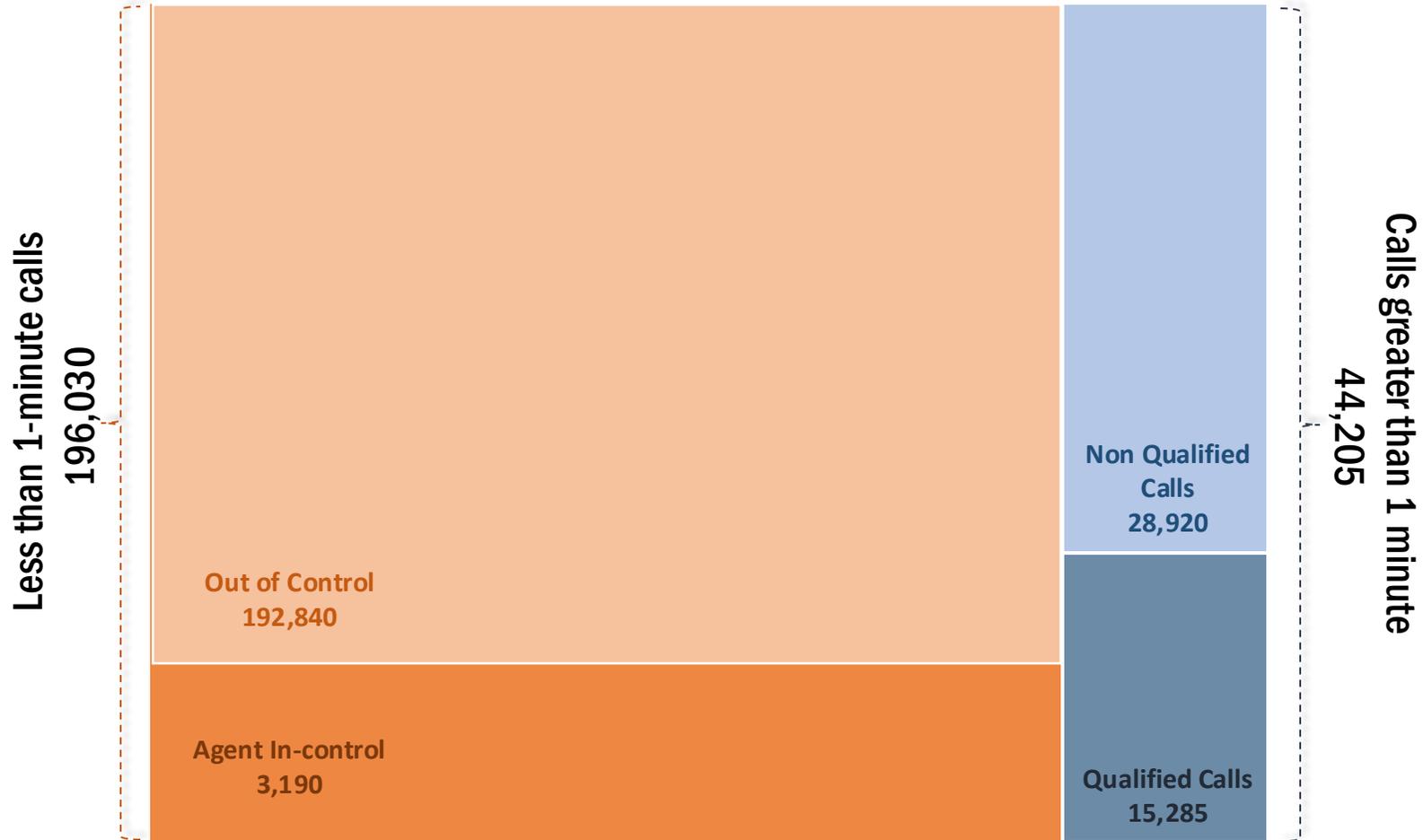


Agenda



Call Volume

Call Volume - 240,235 | August 15 - October 15



Agent In-Control: Where agent did not make any effort to hold the customer when customer mentioned he/she was not interested within first 30 seconds of the call

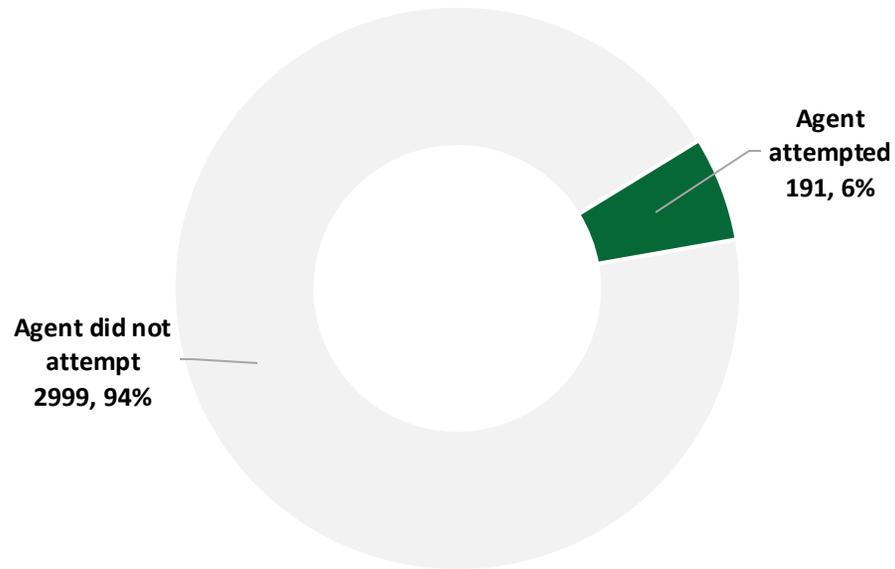
Call ID:
5B0F35747CCA4E8291D8CE09208A4D06
Customer: Yeah, not interested. Thank you.
Agent: Alright, Mr. Robert..

A photograph of a call center environment. In the foreground, a woman with long dark hair in a ponytail, wearing a blue sweater and a headset, is seated at a desk. Behind her, a blonde woman in a black top is pointing at a computer monitor. In the background, another agent is visible at a desk. The scene is brightly lit with large windows. A dark grey diagonal overlay covers the left side of the image, containing white text.

**Less Than 1 Minute
Calls (In Scope
Calls) 3,190**

Short Calls Analysis – Broker Effort

Broker Effort Breakdown



Successful Ancillary Enrollment

8% of calls where agents made and attempt to pitch ancillary; it **converted into Enrollment**.

Agent Effort Present: 191 out of 3190 in control calls

Conversion to Enrollment: 15 calls out of 190

Agent effort missing: On 2999 calls

Potential Enrollment missed in a month: **120 Enrollments**

Potential Revenue Lost per year: **\$1,656,000**

QEval Hierarchical Reporting

Manager 2	Manager 1	Supervisor	Agent	QA Score Without Auto Failure
Alexis	Kayla	Aaron	Brian Barker	39.32%
			Donata Ferguson	46.50%
			Jontay Johnson	52.87%
			Lakisha Smith-Valentine	59.31%
		Camilla	Jamilia Tucker	50.99%
			Jasmine Williams	63.38%
			Kimberly Washburn	46.74%
			Ollisha Odom	45.67%
	Martin	Javin	Renea Rogers	32.94%
			Maria Frederick	45.16%
			Nikki-Ann Crawford	64.41%
			Sebastian Rivera-Estevez	37.29%
		Jeremy	Stacy DeAngelo	42.65%
			Benjamin Alan Sampson	52.41%
			Dwayne Dandy	47.82%
			Jai-Shri Richards	48.56%
	Beth	Katherine r	Tammy Tobi	51.25%
			Dacoiya Burton	45.55%
			Jeetendra Dash	50.01%
			John Beard	52.85%
		Leslie	Stephanie Carter-Rose	57.77%
			Chaquana Mcclam	40.44%
			Krystal Nice	42.15%
			Laura Moss	45.91%
		Lois	Laura Villa Mota	57.95%
			Shae Reiser	51.37%
			Aishat Ojo	40.34%
			Albert Taylor	43.95%
		Daja King	44.45%	
		Jeremiah Jenner	33.27%	
		Trevelle Stewart	51.28%	

Workload Assignment

Edit Workload Contact

Client Name: Medicare Enroll
Program Name: Sales Report

WorkLoad Contact Name: Medicare Enroll_Sales

Filter: Select Filter
Filter Value: Select

Filter Value	Action
10	Delete

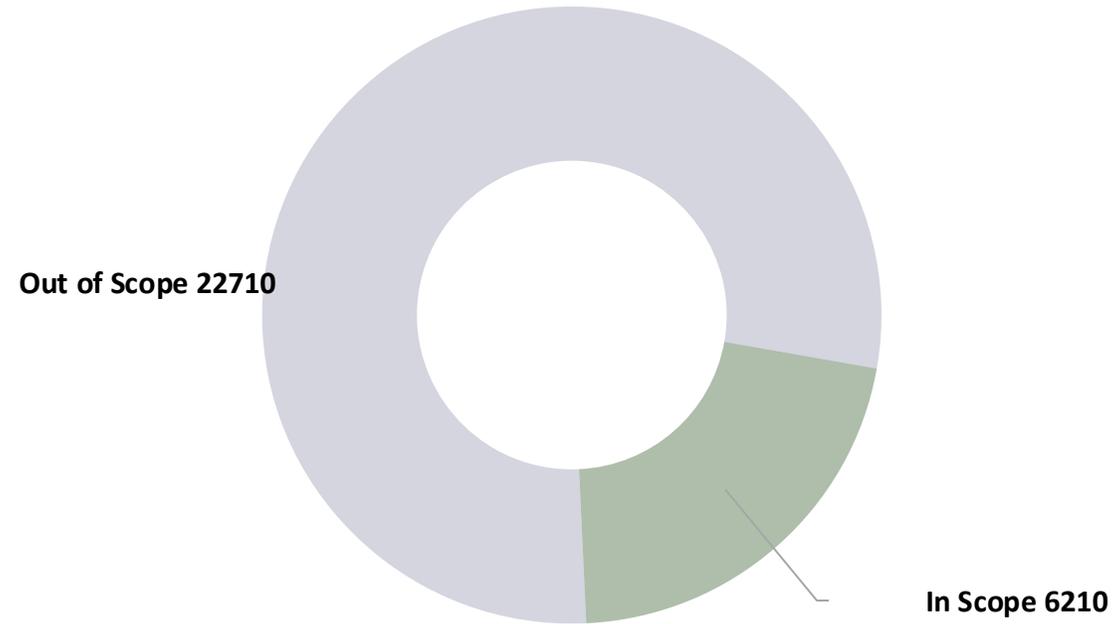
Update Cancel

- Create Workload Group
- Add Workload Contact
- Assign Work Queue

**Non-Qualified
Calls 28,920**



Non-Qualified Calls Analysis



Out-of-scope:

Calls where broker did not have the opportunity to pitch a plan and convert into an potential enrollment.

Possible scenarios:

- Customer has either part A or B
- Customer is no longer available or deceased.
- Calls where in retention agent is speaking.

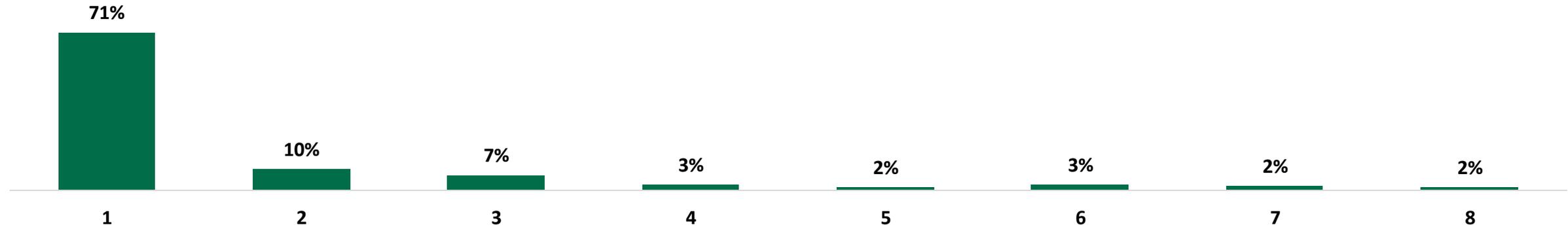
In-scope:

Calls where broker had the opportunity to pitch a plan and convert into an potential enrollment; however, missed to utilize it effectively.

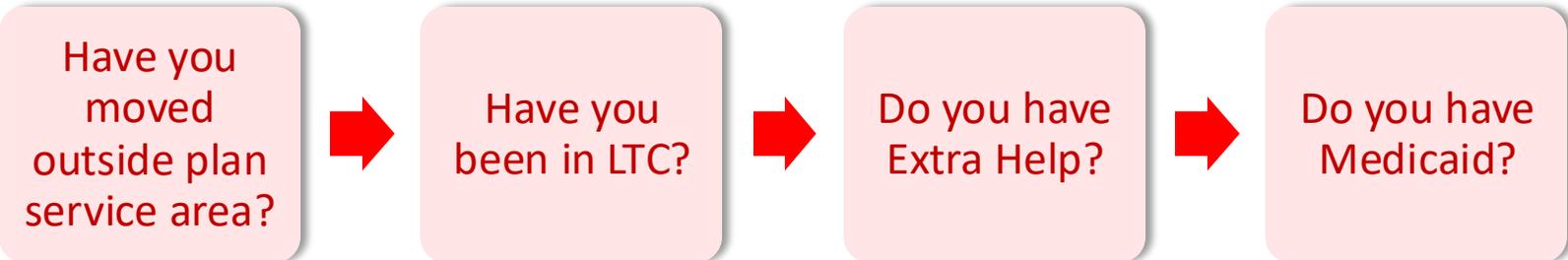
Possible scenarios:

- Customer has no MAPD plans in the area.
- Customer does not qualify for SEP

Agents Effort To Identify Valid SEP



Current



Recommended

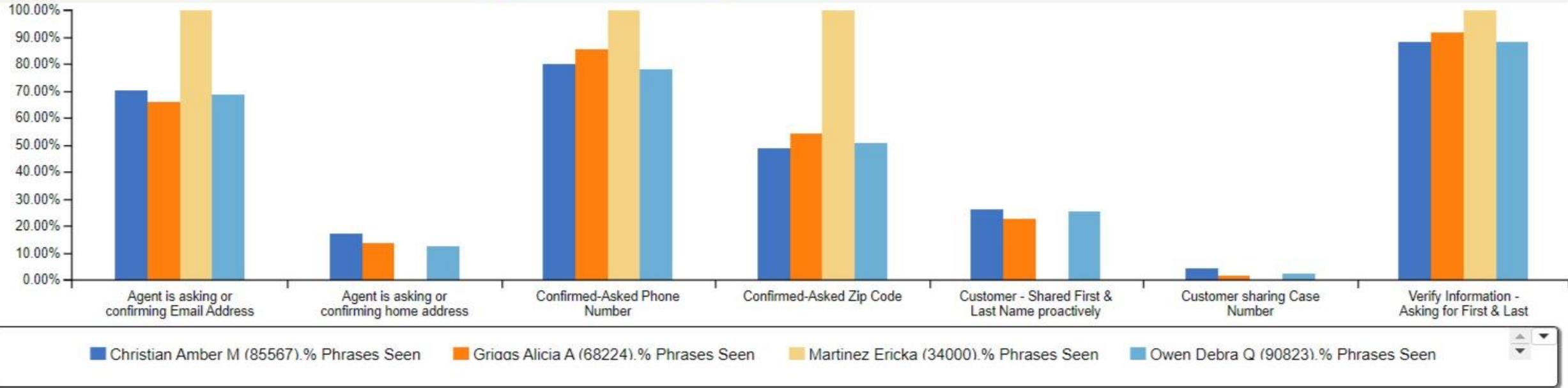


Conducted deep dive analysis to understand the effective flow of qualifying questions.

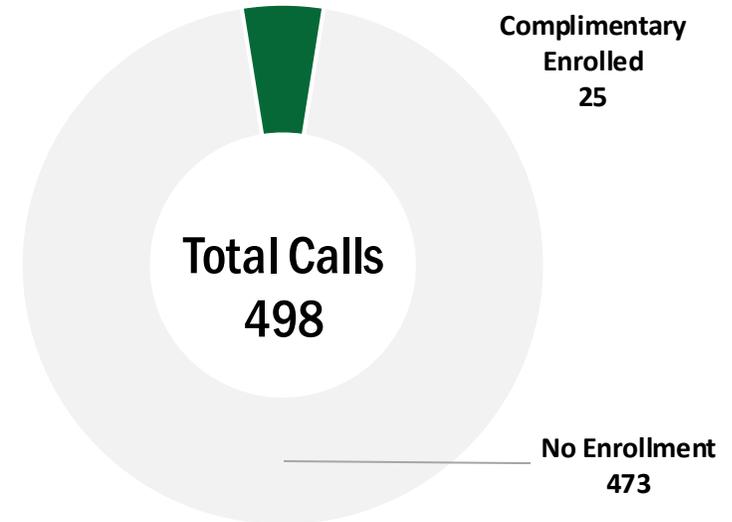
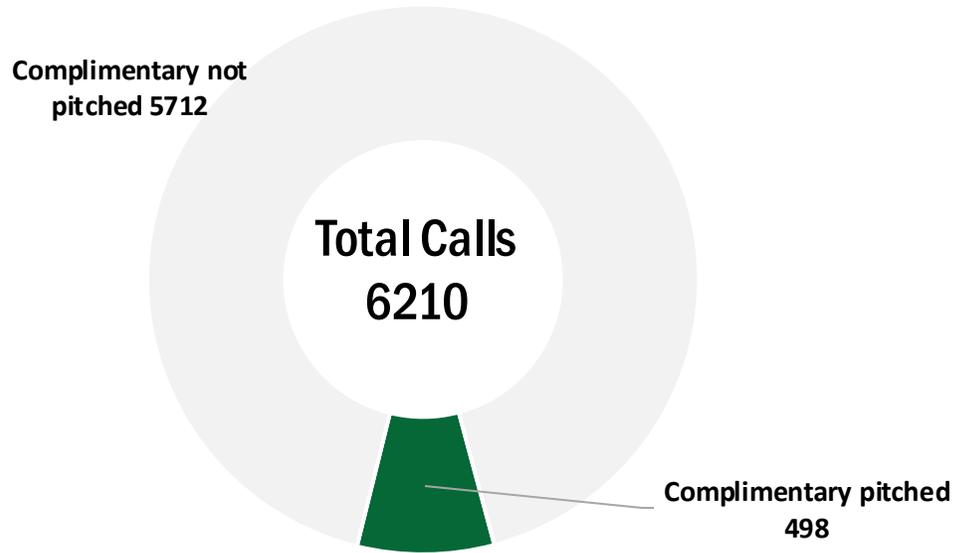
Business Intelligence Dashboard

Cumulative, 01/01/2022 - 12/31/2022

Customer: Customer 1 × / Call Element Category: Verification × / Call Element Sub Category / Supervisor



Agents Effort To Pitch Ancillary



Near real-time reports in QEval with actionable insights helping supervisors to provide targeted coaching.

Agent Effort Present: 498 out of 6210 in control calls

Conversion to Ancillary enrollment: 25 calls out of 498

Agent effort missing: On 5715 calls

Potential Ancillary enrollments missed per month: **140 enrollments**

Potential Revenue Lost per year: **\$1,980,300**

Breakdown In-scope – Broker Level (QEval Screensh0t)

*Data showcases brokers who have handled more than 15 calls.

Bottom 5 Performers			
Broker Name	In-Scope	Pitched	Sales
Nicole Slavin	97	18	0
Anessia Samuel	108	17	0
Karen Simpson	55	14	0
Christopher Gill	83	12	0
Karen Washington	119	12	0

Top 5 Performers			
Broker Name	In-Scope	Pitched	Sales
Christine Thompson	45	25	3
Jasmine Williams	46	18	2
Khairunissa Punja	95	18	2
Pauline Cornwall	169	32	2
Lakisha Smith-Valentine	136	43	1

Easy one-click view of all your agents!!

Document Map

- ProgramSummaryReportByAgen
 - Abdullatif Natar
 - Adriana Esquivel
 - Aishat Ojo
 - Albert Taylor
 - Alecia Yee
 - Alex David
 - Amber Brown
 - Analyla Dunnam
 - Anessia Samuel
 - Angelique Gomez
 - Ashley Boggess
 - Bandel Wane
 - Benjamin Alan Sampson
 - Brandon Pierre
 - Brenton Shackelford
 - Brian Barker
 - Brian Fenton
 - Brionne Phillios

Program Summary Report by Agent
 Date Type : Call/Chat Date Range : 08/01/2022 To 10/31/2022 Sub Program: Client
 Name : SeniorCareBenefits_AI_EI_Multi Evaluation Form :Sales Form v12.7.22
 Program:MedicareEnroll Sales AI Partner Name: All Location: Sawgrass

Agent	Max Points	Total Possible Point	Total Scored	Performance(%)	Performance Bar	Status
Total Evaluation: 223						
Abdullatif Natar						
A. Greeting and expectation						
1. Did broker introduce themselves by stating full name?	0.30	66.9	66.3	99.1%		
2. Broker used proper greeting. (Branding the Company)	0.30	66.9	60.3	90.13%		
3. Did the broker explain the intention of the call correctly and within the first 3 minutes?	0.40	89.2	76.8	86.1%		
Section Average		223	203.4	91.21%		
B. Sales Process Identify Customer Needs						
4. Did the broker identify the beneficiaries current coverage within the first 3 minutes?	0.66	147.18	90.42	61.43%		
5. Did broker perform primary probing?	0.77	171.71	130.9	76.23%		
6. Did the broker made efforts to understand what benefits the customer is looking for?	0.77	171.71	43.12	25.11%		
Section Average		490.6	264.44	53.9%		
C. Plan Highlights						
7. Did the broker stick with beneficiary specific benefits only? (Tie Down)	2.20	490.6	171.6	34.98%		
Section Average		490.6	171.6	34.98%		
D. Attempt to Close the Sale						
8. Did the broker ask for sale after reviewing the three Ps (Premium, Provider, Prescriptions)?	1.70	379.1	215.9	56.95%		
Section Average		379.1	215.9	56.95%		
E. Attempt to overcome objections						
10. Did the broker attempt to overcome objection?	1.00	39	24	61.54%		
Section Average		39	24	61.54%		

Performance Breakdown of all critical parameters

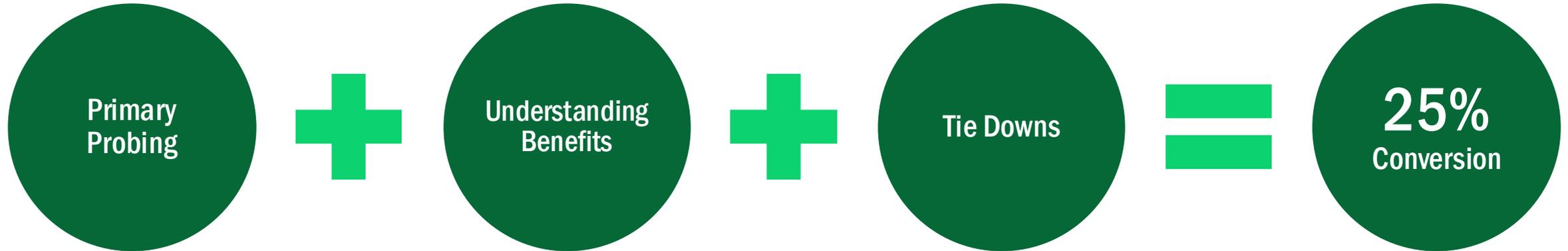
**Qualified
Calls 15,285**



What's Working | Crucial Behavior Success Rate

Broker asks generic probing questions to identify customer's likes and dislikes with existing plan and/or what the customer needs.

Effectively utilizing customer's needs and highlighting as a benefit or sales pitch.

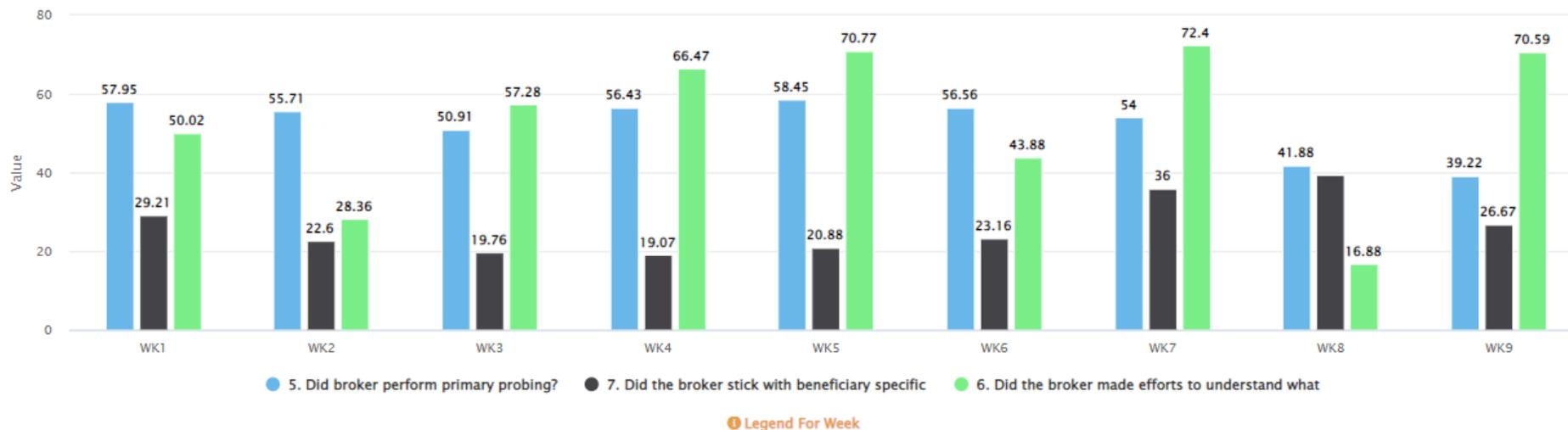


Broker needs to ask specific questions focussing on the benefits that MAPD plans offer and understand what the customer wants.

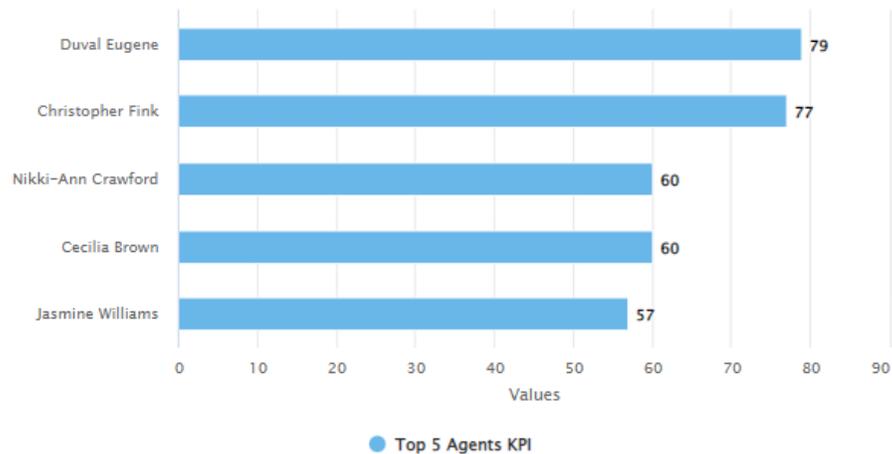
Conversion goes up by **6%** when broker exhibit all 3 crucial behavior

QEval KPI Dashboard

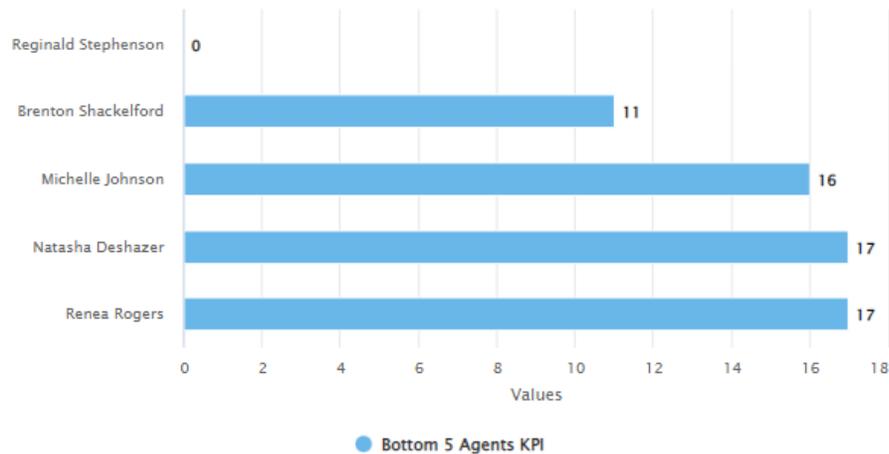
Strategic Parameter Score



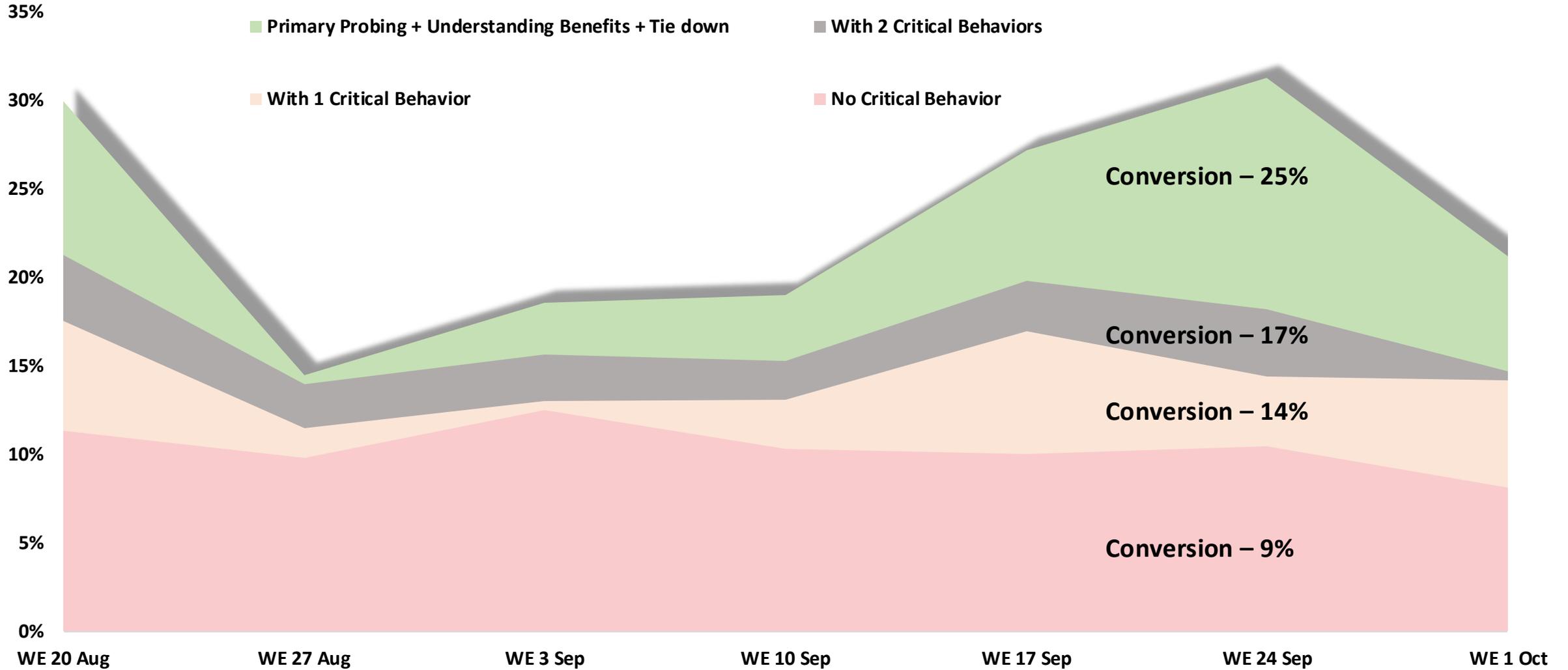
Top 5 Agents KPI



Bottom 5 Agents KPI



What's Working | Crucial Behavior Success Rate



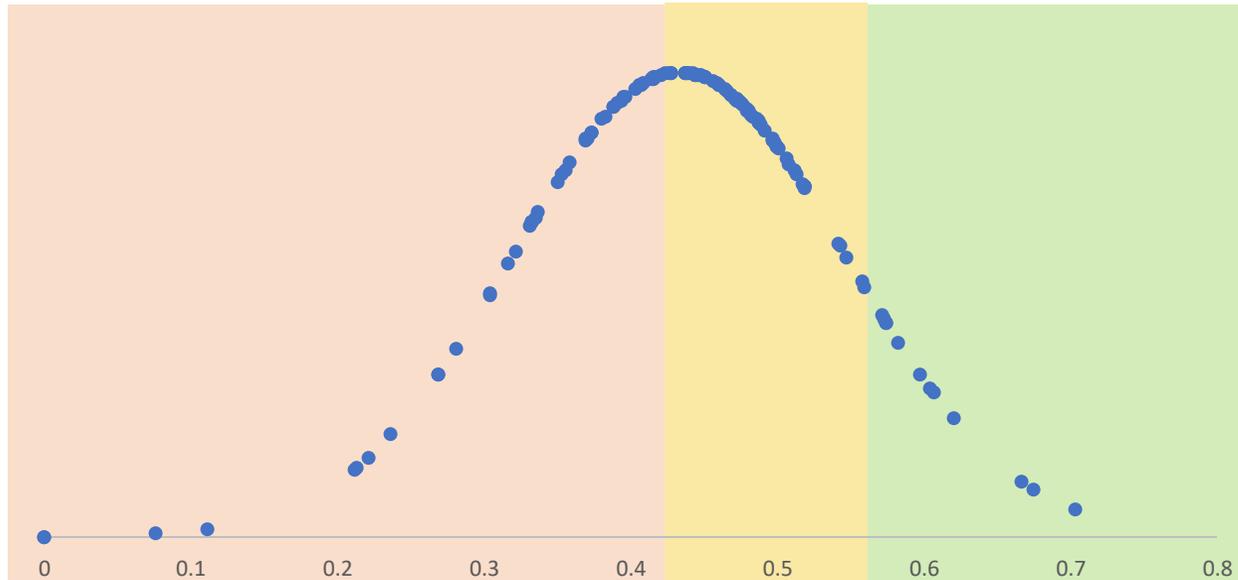
Crucial Behaviors Distribution Analysis

Unacceptable Range	Needs Improvement Range	Meets Expectation Range
0% - 43.34%	43.35%- 54.67%	Above 54.67%
54 Brokers	62 Brokers	15 Brokers

Average Score - 33.54%
Conversion % - 12%

Average Score - 47.82%
Conversion % - 18%

Average Score - 60.10%
Conversion % - 23%



Current State

Overall Strategic Behavior Score: 43.34%

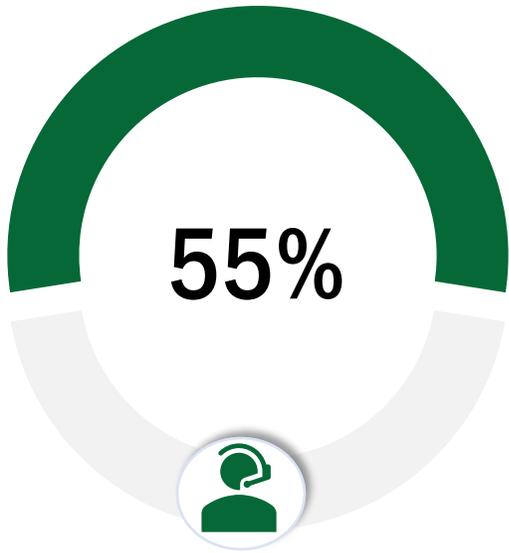
Broker Level



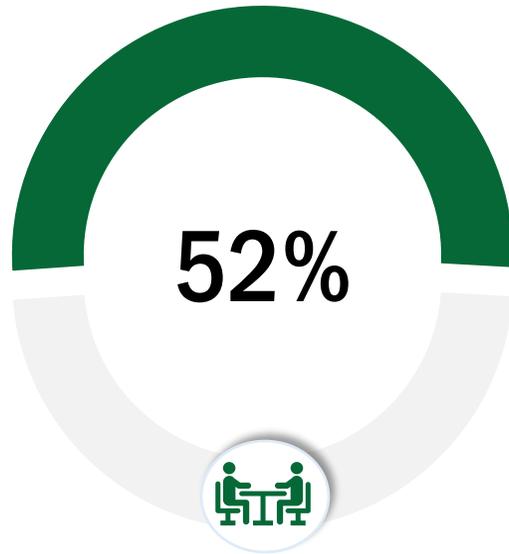
Equal weightage of 33.33% is considered for all 3 Strategic behaviors (Probing, Understanding Benefits, Tie Down)

Formula - (Primary Probing%*33.33%)+(Understanding Benefits%*33.33%)+(Tie Down%*33.33%) = Score

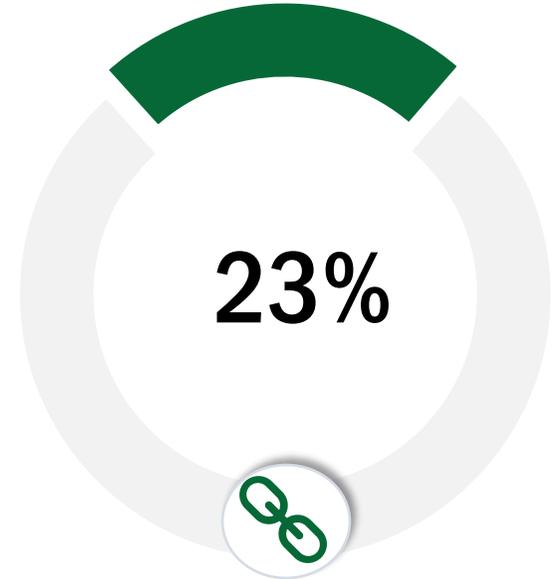
No Sale Calls Vs Critical Behaviors



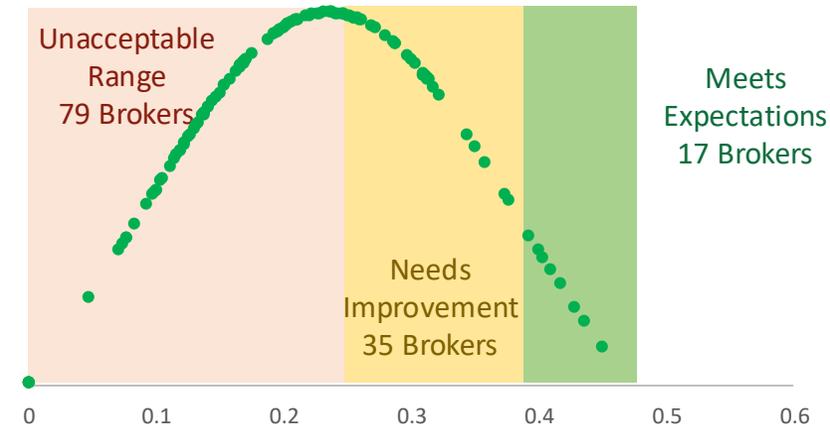
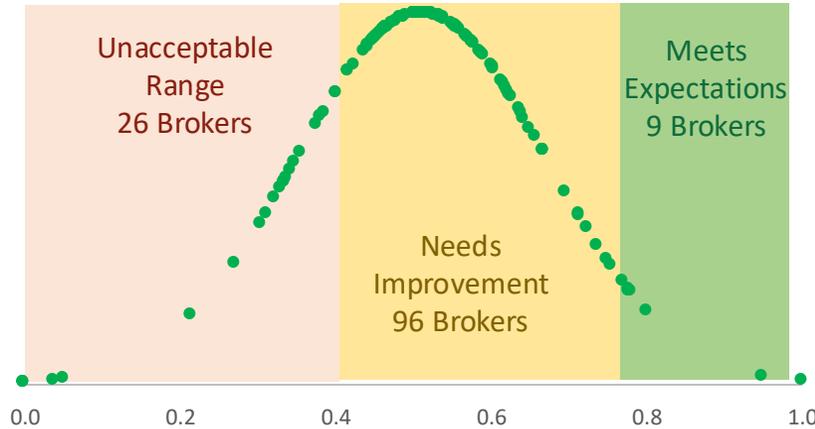
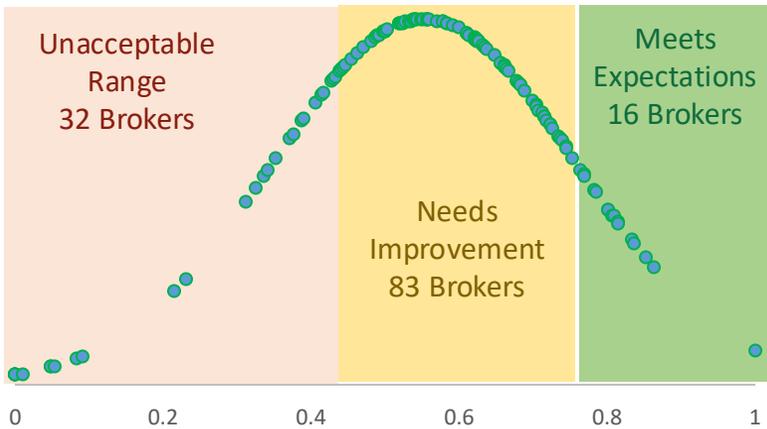
Primary Probing



Understanding Benefits

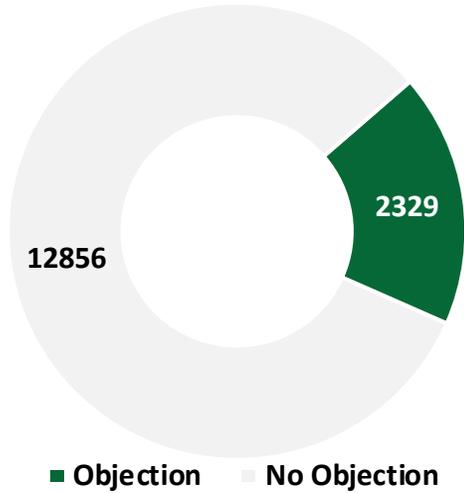


Tie-Downs



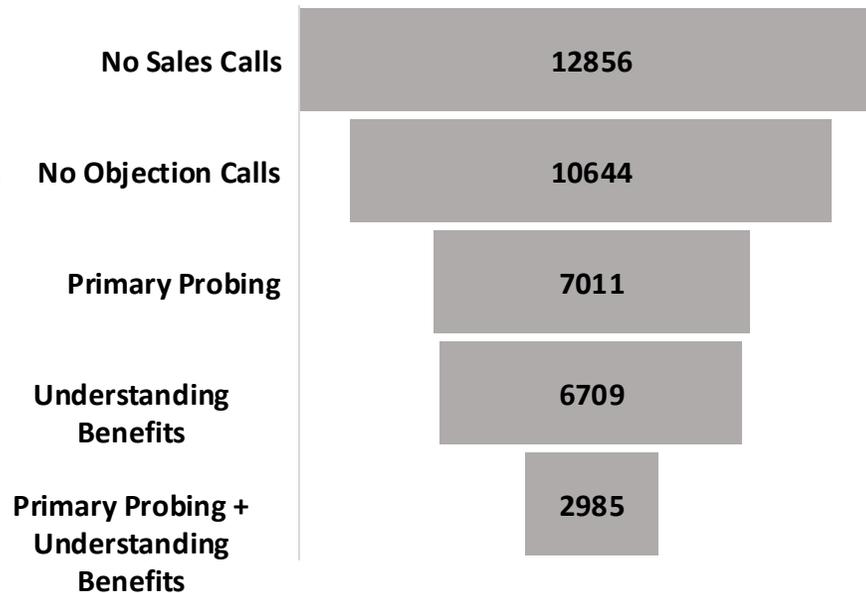
N = 12,858

Easy Sales Calls

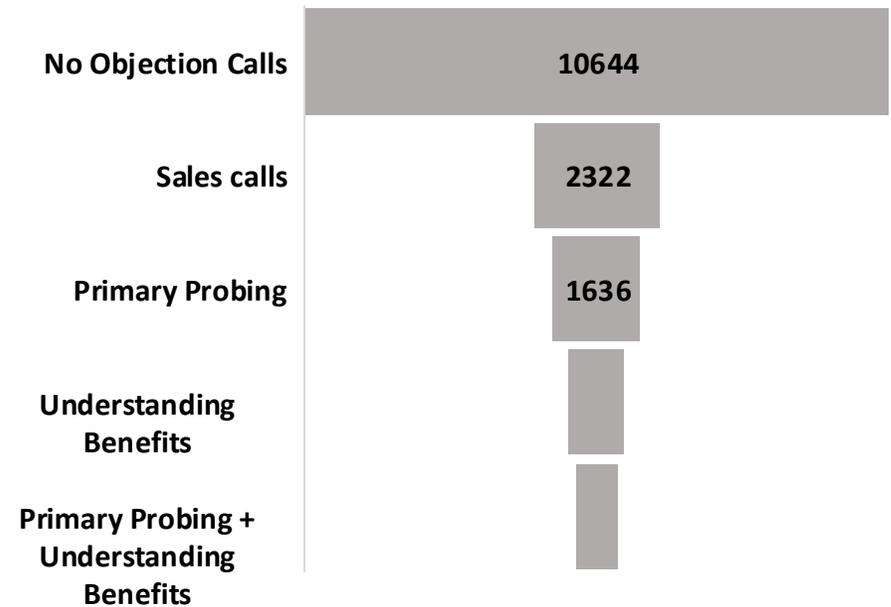


We did not do probing and did not try to understand benefits on **72%** of the no sale calls where customers did not even raise an objection

Unsuccessful No Objection Calls v/s Crucial Behaviors

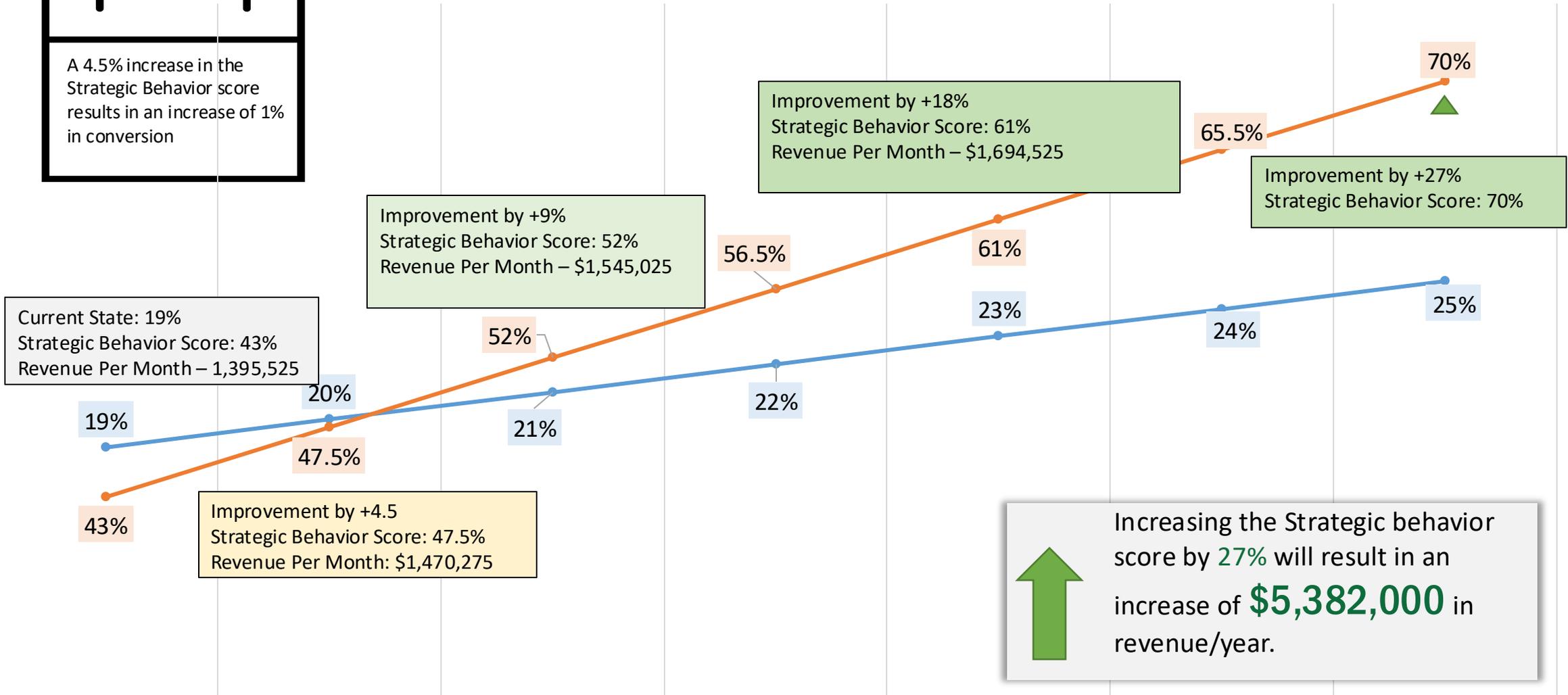


Successful No Objection Calls v/s Crucial Behaviors



ROI From Crucial Behaviors

A 4.5% increase in the Strategic Behavior score results in an increase of 1% in conversion



Increasing the Strategic behavior score by 27% will result in an increase of **\$5,382,000** in revenue/year.

—●— Conversion —●— Crucial Behavior adherence

Practical Application

Understanding Benefits

Primary Probing

Dental Coverage
(35%)

Over the counter
(31%)

Current Plan Likes & Dislikes
(37%)

Additional Coverage
(29%)



Practical Application 1

Are you currently seeing a dentist or in need of a preventive or comprehensive dental?

Are you familiar with over-the-counter benefit?

How do you like your plan with health first? What do you like about it?

What else are you looking for other than the benefits that you have?



Practical Application 2

How much dental coverage do you have?

What about over the counter help to help pay for any nonmedical supplies that you normally pay out of pocket for?

Is there anything that you like or dislike about your plan?

Is there anything additional or extra benefit, that you need apart from what you have?

Exploratory Time Series Analysis

Crucial Behaviors Adherence % by Hour

Time/Day	Monday	Tuesday	Wednesday	Thursday	Friday
9:00 AM	4%	20%	0%	20%	15%
10:00 AM	30%	20%	7%	28%	27%
11:00 AM	16%	13%	11%	14%	13%
12:00 PM	16%	20%	17%	18%	8%
1:00 PM	11%	7%	11%	15%	7%
2:00 PM	10%	20%	9%	6%	13%
3:00 PM	10%	6%	17%	10%	15%
4:00 PM	6%	12%	13%	25%	3%
5:00 PM	13%	33%	15%	4%	9%
6:00 PM	11%	28%	12%	4%	8%

We see agent enter into a **slump with crucial behaviors** somewhere around 2 pm and we see **conversion down by 1% every hour until 4 pm**

Scale

Call Volume (Color/Heat)	0	10	20	30	40
Crucial Behavior	Percentage				

Etech Recommends

Coach

Floor Announcements, **Team Huddles** around 9 AM window **to review the importance of adhering to crucial behaviors** at the right time in a call.

Manage

Schedule shifts of your top performers in equally distributed phases during optimal conversion window to ensure you always have the best and fresh agents on phone.

Control

Utilize Speech Analytics to gain **real time insights** into performance and **adjust coaching efforts accordingly.**

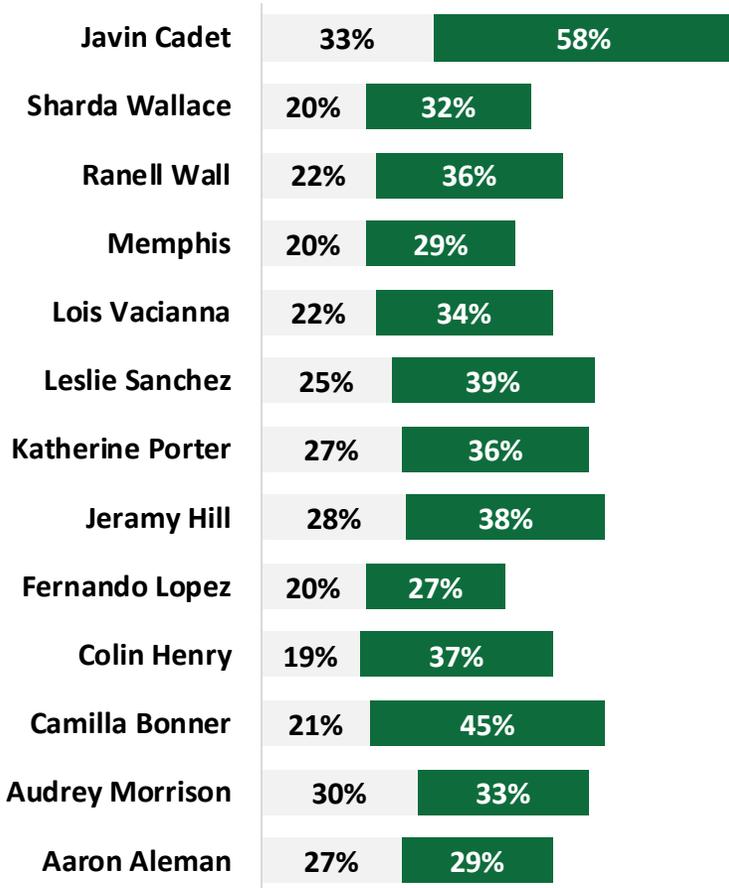


Appendix



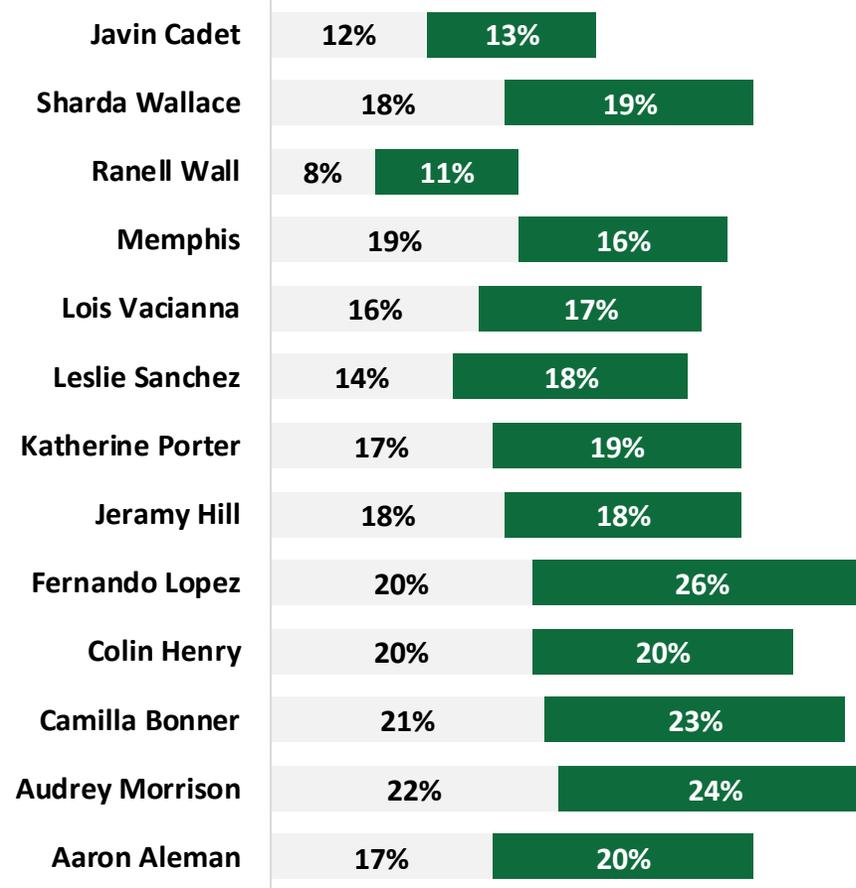
Critical Behavior – Manager Level Breakdown

Primary Probing



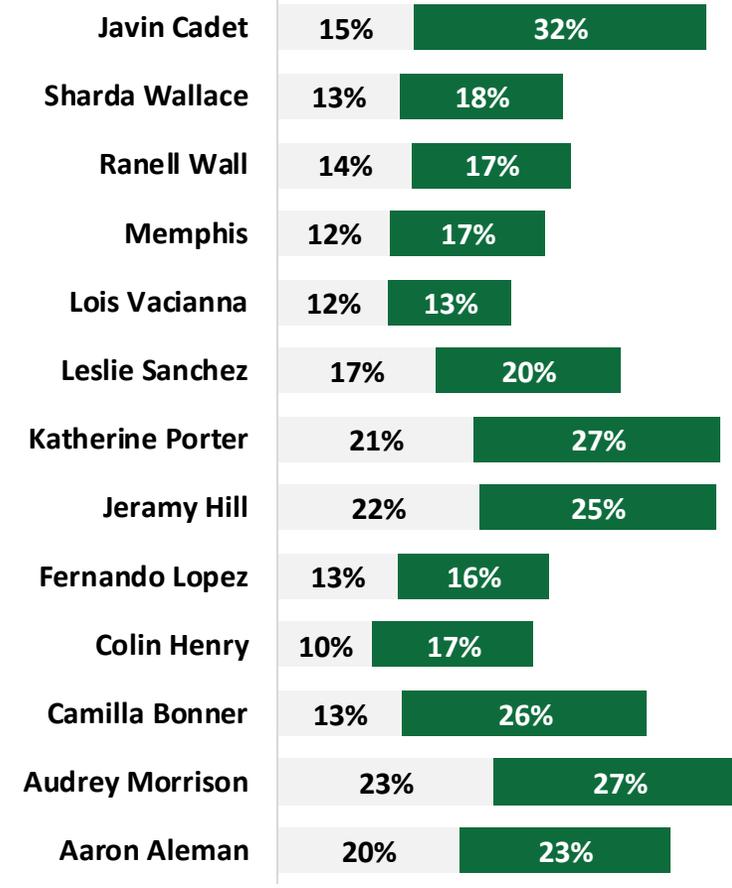
■ No Enrollment ■ Enrolled

Understanding Benefits



■ No Enrollment ■ Enrolled

Tie-Downs



■ No Enrollment ■ Enrolled

Good Calls – Probing And Tie Downs

Probing

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- **Broker:** Some of the plans offer you over-the-counter help so that you can get your vitamins, your cough medicines, band-aids, rubbing alcohol. The things that you get at a pharmacy. Is that something you would be interested?

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- **Broker:** Are you needing any dental work done?
- **Customer:** Yes, I do. Because, I had them pulled years ago.
- **Broker:** Okay, so you need dental.
- **Customer:** Yes, ma'am.
- **Broker:** And what about glasses, vision?
- **Customer:** Yeah, I have a vision problem. I had one pair, but I don't know what I did.

Tie Down

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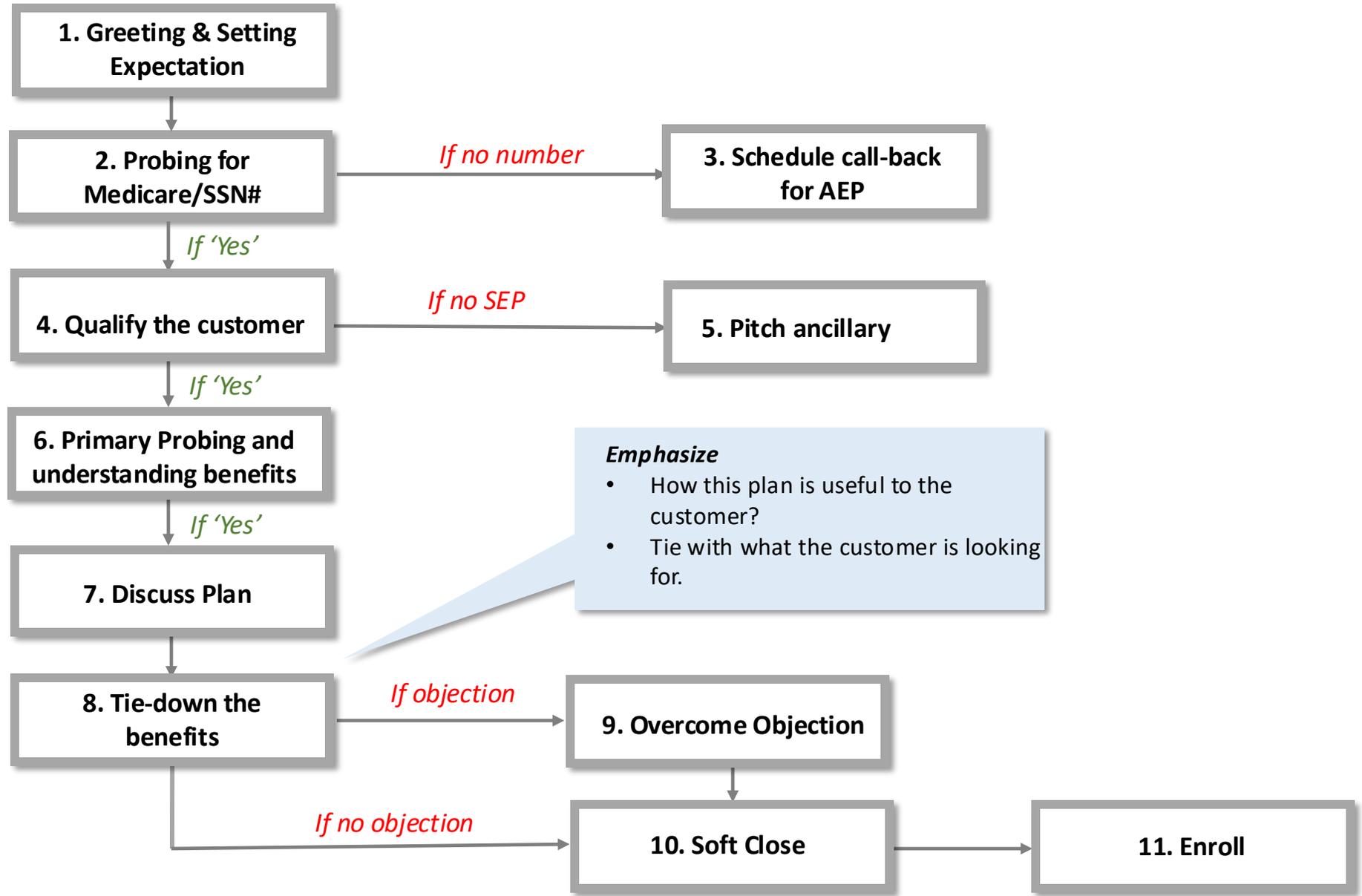
- **Broker:** You also have a benefit here for chronic condition that you pay \$0 copay for unlimited non-medical one-way trip every year.
- **Customer:** Is it one way trip or both ways?
- **Broker:** It says one-way trips, but it is one way of going in and one way coming back. So, this will help with your to-and-fro travelling.

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- **Broker:** Since you wanted flex card, this one has flex card benefit of \$2,500 per year to use with your dental, vision and hearing.

Recommended Call Flow

Helps brokers to understand what the customer is looking for and pitch for the right plan.



Emphasize

- How this plan is useful to the customer?
- Tie with what the customer is looking for.

What to Fix

Revenue Impacting Behaviors

Every **4.5%** increase in Strategic Behavior Score will result in increase of **1%** of Conversion



Exhibit Strategic Behaviors on all Potential sales calls

- **Primary Probing**
- **Understanding Benefits**
- **Tie Downs**

Effective pitch for Ancillary

There were 5,712 calls were in broker is not making attempt to pitch for our ancillary products.

How to Fix

✓ Address

- Address opportunities areas like critical behaviors immediately with the broker: Qualifying the customer & Identifying the needs

✓ Add Value & Educate

- Educate the broker by adding value to these critical behavior.
- Coach on why it is important to ask these questions.
- How and why, it will benefit our customer.

✓ Play Good Calls

- Reinforce best behaviors with the team.

✓ Conduct Team Huddle for Quick Reinforcement daily

- Conduct pre- and post-shift Huddles to explain the importance of exhibiting all the critical behaviors.



Jim Iyooob
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Chief Revenue Officer –Etech



Thank You!

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