



How Customers Can Lead Your Business Transformation in 2024

Learn how top organizations use customer insights to drive business performance improvements – well beyond the contact center



Learn why CallMiner was named the Leader in The Forrester Wave™:
Conversation Intelligence for Customer Service, Q3 2023



Introduction

Could the secret to business performance improvement lie in what your customers are already telling you? The voice of the customer (VoC) means so much more than just a few-question survey at the end of a contact center interaction, or upon receipt of your latest order. Every word your customers exchange with your sales, customer support, CX, finance teams and more could be essential to driving transformational change within your business.

Yet, very few organizations look beyond solicited feedback, such as surveys, to the goldmine of unsolicited customer feedback they already have access to, such as the everyday interactions that happen in the contact center, on social media, etc. According to the 2023 **CallMiner CX Landscape Report**, the majority (71%) of organizations are collecting mostly solicited customer experience (CX) and customer satisfaction feedback.

These unsolicited conversations could improve your entire company's efficiency and effectiveness, drive long-term loyalty, create better marketing campaigns, enhanced billing practices, and even provide ideas for continuous product improvement. But, are you in a position to uncover these insights and use them to help transform your organization?

Many of the leaders surveyed in the **CX Landscape Report** face challenges with internal misalignment and more: 68% say the CX data they collect is often not used to their organization's best advantage, and 50% lack effective communication between departments.

How do winning teams harness this data effectively to make practical changes in their organizations? How do they reach across functions to make a larger business impact with this data?

The businesses profiled in this eBook are analyzing 100% of customer conversations in an omnichannel environment using conversation intelligence technology. They've proven the ROI to their executive teams and used data from customer interactions to inform everything from contact center efficiency and customer experience (CX) processes to product and sales improvements.



What is Conversation Intelligence?

Conversation intelligence is a technology that helps you analyze 100% of customer interactions across every channel. This level of analysis helps extract key trends about your customers and personalize the experience to them, regardless of the channel they're using. Conversation intelligence can be combined with other structured data sources, such as surveys or product reviews, to develop a complete picture of VoC, CX, and more.

This technology uses AI to extract meaningful insights from data to drive action, including improving operational efficiency, contact center agent performance, customer satisfaction and loyalty, product development, and more. or informing changes to your organization's overall operations.

Chapter 1: UPMC improves agent coaching – and the bottom line

A premier health system in Pittsburgh, Pennsylvania and renowned academic center with an international footprint, University of Pittsburgh Medical Center (UPMC) puts its member (patient) experience at the center of everything it does. The UPMC Health Plan offers a full range of products and services to more than four million members, with 560 concierges (agents) in Member Services serving them.

Prior to implementing conversation intelligence, the UPMC Health Plan Member Services team faced challenges in their manual QA process, but they were determined to overcome them and find effective solutions.

“As an unscripted contact center, each concierge has a unique way of approaching things with members,” said Cori Hoff, customer engagement manager at UPMC. “With more than 400 different call types, it was difficult for our small QA team to understand where our concierge team could use additional coaching or training, or how our member experience could be improved.”

Developing a ‘World Class Call Score’ with CallMiner

UPMC adopted the CallMiner conversation intelligence platform to analyze and score 100% of member calls, instead of just a fraction of them. The team developed a ‘World Class Call Score’ that concierges received daily, instead of weekly, and measured them on key benchmarks.

To roll out the World Class Call Score with concierges, the team focused on informative and lighthearted engagement strategies that included newsletters, contests, incentives and rewards. Examples included CallMiner Kentucky Derby and March Madness incentives.

“We try to make it fun, and gamify their experience with CallMiner, while giving them tips and tricks on how to use the tool to their advantage,” said Hoff. “Our strategy pulls in a lot of engagement, and makes our concierges laugh and have fun.”

Inspiring a culture of continuous improvement

The UPMC team hasn’t rested on the initial success of its World Class Call Score. After the implementation of conversation intelligence, UPMC has been better able to anticipate members’ needs to achieve first call resolution (FCR). The team has successfully enhanced member experience by implementing coaching-based action plans aimed at minimizing member dissatisfaction. This proactive approach has proven highly effective in identifying and addressing areas of concern, leading to greater member satisfaction and overall improvement in the quality of service provided. In addition, increasing their QA coverage to 100% of calls has ensured compliance in external audits, and driven operational efficiency.

“We have been able to improve certain processes, including streamlining prior authorizations,” said Hoff. “After seeing call data trending in CallMiner, we established a new process where physician account executives reached out to providers to educate them on when and how to send in prior authorizations. That change resulted in significant improvements, which reduced the number of repeat callers.”

In the future, the team plans to expand its use of CallMiner to collect even better data and further enhance the member experience. As a part of this effort, the team plans to share insights with other departments to drive business improvements, and further engage with healthcare providers.

“Our marketing team recently asked for information on LGBTQ+ calls we’ve taken to learn about proper terminology, procedures, and more,” said Hoff. “The marketing team can leverage insights from real customer interactions to develop the best materials, demonstrating empathy and highlighting the resources and information we have for that community.”

Read the [full success story here](#).

Chapter 2: BPO division of NTT improves CX with AI-powered analytics

As an industry leader in networks, data centers, cloud, security and managed services, as well as an innovator in private 5G, NTT serves 65% of the Fortune Global 500 and more than 75% of the Fortune Global 100 companies. As a part of the company's cloud-connected customer experience (CX) and business process outsourcing (BPO) division, NTT is using CallMiner's conversation intelligence platform to understand its clients' omnichannel Voice of the Customer (VoC) and provide agents with data-based coaching and training to improve CX.

The BPO division of NTT is constantly looking for better ways to deliver data driven VoC insights to clients. However, in the past, manual QA reviewers only listened to a fraction of calls, making it difficult for the team to fully understand areas of improvement. Beyond the contact center experience alone, many clients wanted to tap into VoC insights to understand how customers react to marketing campaigns, new product launches, sales offers and more.

“We received lots of questions from clients that were really hard to answer,” said Aixa Aldana, Program Manager, BPO division of NTT. “Our QA teams had to go through many calls in a cumbersome manner to be able to answer questions around VoC, competitive insights, or ascertain ways to enhance client products, services or campaigns. The sample size from QA was too small to provide any meaningful insights.”

Analyzing 100% of customer insights

The BPO division of NTT selected CallMiner to analyze 100% of customer interactions, view trend reports based on categories, and take a data-driven approach to agent coaching. The team configured categories in the system around VoC, sales analytics and retention, based on client needs. With CallMiner, the team can now parse omnichannel feedback, including feedback from social media channels, to give their clients a deeper understanding of customers.

“CallMiner is a market leader when it comes to improving CX,” said Daphnee Lysius-Dicette, Senior Product Manager, BPO division of NTT. “We now have the data, skills and expertise to drive the insights our clients need, make informed decisions, and effectively coach our team.”

Depending on the client, the BPO division of NTT can use CallMiner across a variety of use cases, including visibility into sales effectiveness, traditional contact center KPIs such as customer satisfaction scores (CSAT) and average handle times (AHTs), and deeper product insights to create product roadmaps. With CallMiner, the BPO division of NTT can configure reports to focus on specific insights from customer conversations, regardless of the channels from which they originate.

Delivering enhanced analytics to clients, while improving employee experience

As a managed service provider, it's critical for the BPO division of NTT to deliver higher level insights to clients – driving more informed decisions with data, versus gut instinct or intuition.

“Whether we're analyzing agent QA or monthly trend insights, we now have better data to make decisions for coaching our staff or providing clients with sound recommendations,” said Lysius-Dicette. “When it comes to customer sentiment and VoC, we find that our clients can understand their customers better. They can now see the pain points and breakthroughs when they have a new strategy or campaign, gain information on how to adjust and enhance customer experience.”

Read the [**full success story here.**](#)

Chapter 3: Hoist Finance partners with CallMiner to transform business operations

Hoist Finance helps six million customers across 11 countries in Europe stay committed to paying off their debts. Whenever customers are in contact with Hoist, they can rely on being treated in a consistent, responsible, and ethical way. The company successfully launched conversation intelligence from CallMiner into its UK operations after purchasing the technology through CallMiner's partner, Alvaria.

Gaining buy-in and driving operational change with conversation intelligence

Before kicking off with a conversation intelligence platform, the Hoist Finance workforce optimization and analytics teams knew they had to properly educate everyone in the UK organization, including getting executive buy-in for the technology. The goal was to help their colleagues understand the benefits and operational changes required once they were equipped with deeper customer engagement data.

With a myriad of requirements from stakeholders and excitement about the promise of conversation intelligence, the workforce optimization and analytics teams set short-, medium- and long-term goals to align stakeholder expectations with reality.

The key areas where the team wanted to see ROI improvements included:

- **Speed to intelligence:** Gathering data quickly to validate agent performance, understand customer contact drivers, and ensure kept promises based on customer behavior.
- **Silence detection:** Understanding silence to lower inefficiencies, lower cost and increase service levels.
- **Long call analysis:** Identifying the drivers and impact of long calls on the organization.

- **Reduction in Average Handle Time (AHT):** Achieving agent efficiencies to reduce overall handle times for customers.
- **Re-allocation of QA attention:** Automating performance and scoring so quality assurance (QA) could focus on more strategic tasks.
- **Agent ramp and attrition:** Gaining constant and definable feedback to improve agent performance, as well as give the employees the feedback they need in real-time and post-contact.

Automating omnichannel insights with CallMiner

Hoist Finance used the DMAIC (Define, Measure, Analyze, Improve and Control) method to build an ROI development plan, and define how enterprises leaders engage with the analytics team and the CallMiner platform. Hoist then launched a Facebook Workplace website and established a steering committee to help people see and believe in the value of the program. Hoist Finance believes conversation intelligence kicks open the doors of what's possible, and they were able to quickly and consistently add value and demonstrate insight across departments.

One area of insight was silence. Silence can hold a variety of meanings to different organizations. It can show that an agent is listening, emphasize a point, give a customer time to consider an offer, or signal an issue or need for process improvement.

For example, one agent had a high volume of silence at the end of his calls, after the customer had already hung up. It turned out that he was taking notes after the call had wrapped up, which was negatively impacting his scores due to unnecessarily long silence times. Once he became aware of this behavior, his silence times immediately reduced.

Further, based on their success with CallMiner in the UK market, the Hoist Financial team is working to roll out its conversation intelligence program in other countries, including France, Spain, Poland, Germany, and Italy. And the team is working to fully automate QA across all markets.

Read the [**full success story here**](#).

Chapter 4: How Radial uses CallMiner for cross-departmental business improvement

Radial is a leading outsourced ecommerce technology and services company, focused on improving every point in the omnichannel customer journey. Its offerings span across four primary lines of business: omnichannel solutions, fulfillment and transportation, payments and fraud, and customer care.

With nine customer care locations around the globe offering 24/7 coverage, Radial was looking for a technology solution that could help its agents continuously improve based on their interactions with customers. The majority (around 80%) of its global workforce worked remotely, and the team wanted to ensure that every agent received a consistent level of feedback from supervisors – regardless of whether they were in-office or working from home.

Beyond providing agent feedback alone, Radial needed a solution that could help its customer care team evaluate trends across a wide variety of channels, while still processing massive amounts of voice interactions.

Surveys reflected just the highs and lows

In the past, Radial relied on feedback from customer surveys to determine how to optimize the customer experience (CX). Having conducted surveys for over a decade, the team was finding diminishing value in the survey results. Typically, the feedback only reflected very positive or very negative interactions, leaving a huge gap of coverage for middle-of-the-road conversations. And in recent years, the number of survey responses was waning.

“One of the biggest reasons for evaluating a conversation analytics solution was getting away from surveying and focusing on utilizing the interactions we already have with customers,” said Robin Gomez, director of customer care innovation at Radial. “With conversations, you can take customer feedback in the moment – using it to improve CX measures, reduce friction points, and drive value props in a more effective and efficient way.”

Sharing feedback across departments

Radial understood the long-term value of these insights to other departments. For example, if a marketing campaign was released that confused customers and led to an influx of contacts, there was no way to relay that feedback in the past. Or, if the fulfillment and transportation departments were facing supply chain issues, the sales and customer care departments would bear the brunt of negative customer interactions, with little insight into when these bottlenecks would be resolved.

Now with CallMiner, agents, supervisors and internal operations can get visibility into both individual and team performance – on a granular and higher-level trend basis. Gomez and his team educate their colleagues on the meaning of these statistics, so they’re not just numbers on screens.

“It’s important that you know what you’re looking at so you can take action on these insights,” Gomez said.

In addition, Radial pulls CallMiner data into its business intelligence platform to enrich the data shared across every department in the business. CallMiner helps Radial see their data in the context of the entire customer journey – from pre-purchase, to fulfillment, to post-purchase (and ideally long-term loyalty).

For other organizations looking to implement conversation intelligence programs, Gomez said:

“Start local. We kicked off the program with our customer care division, and expanded globally to supply chain, product, marketing and other departments. That way, you can prove the value of the technology and program with hard metrics that tie to financial results.”

Read the [full success story here](#).

Chapter 5: Qualfon achieve significant sales and process improvements with CallMiner

Qualfon is a full-service, mission-driven business process outsourcing (BPO) provider offering full customer lifecycle management capabilities. The company differentiates itself by the quality of experience it delivers to its clients and their end customers. Qualfon has a rigorous ongoing quality improvement process, and leverages conversation intelligence technology to boost sales, coach its agents and make meaningful improvements to its operations. Qualfon represents more than 200 brands and has extensive contact center operations with well-documented procedures. Prior to implementing conversation intelligence technology, it was challenging to track agent adherence to certain procedures and provide performance feedback in a timely manner. In addition, many Qualfon agents focus on sales for their clients and receive commission for certain accounts. As a part of an effort to continuously improve the sales process, the company transitioned to a consultative selling approach a few years ago. This approach focuses on agents acting more like advisors than salespeople and providing recommendations to prospects based on their specific needs.

“We wanted to make our calls consultative rather than transactional,” says Marvie Wright, Vice President, Learning and Development Client Programs at Qualfon. “Consultative selling is based on the customer’s needs. Prior to implementing conversation intelligence, our calls were focused on making sales. Agents had no agility for customer conversations – we had one way of doing things, and it was done that way on every call. It lacked a sales strategy based on targeted information.”

Leveraging data to improve sales and process-related outcomes

To enable a successful transition to consultative sales, a team that included Wright, the sales director and agent supervisors developed a new approach for agents to use on calls. To create a process of continuous improvement, the team defined specific components of a call that could be measured with conversation intelligence.

Qualfon also wanted to improve how many of its process steps are followed on each call (process adherence) and how well agents put the coaching and training they received into practice, which it calls “coaching adherence.” After working with CallMiner for a short time, Qualfon learned how to apply the technology to help meet its process and quality improvement goals.

Data becomes an indispensable part of sales

With CallMiner, the sales team performs self-analysis by using the platform to find trends in their performance, listen to individual calls, or look at their rankings. Managers can also leverage CallMiner to understand trends. For example, before having access to the analytics and intelligence, some newer agents were selling lower plans because it was easier. Managers could see that trend and coach these agents on how to approach higher value sales, adding diversity to their skillsets. “We now know who to coach and how often, and how to approach these conversations with both data and emotional intelligence,” says Wright. Using agent performance scorecards, the sales team can see who is performing the strongest based on proven sales principles. Using these scorecards, managers can see who needs more support. By quickly focusing on issues with targeted coaching, the team has experienced near-immediate improvements that show up the next day in agents’ sales numbers. Over time, the team has achieved over 95% accuracy on these scorecards, making them a valuable resource for evaluations. Not only have these efforts reduced escalations to managers, but agents are also more likely to handle customer calls with care and focus on accuracy since they know the data and insights exist to see where issues occur.

Beyond the sales team alone, Qualfon has been exploring more ways to use AI-driven analysis to improve the customer experience. For example, the marketing team leverages data from CallMiner to understand customers’ most frequently asked questions. Using this information, the team can design more effective campaigns that proactively address these questions and clarify confusion around issues such as pricing.

“We’ve seen CallMiner become a partner across more and more mission-critical areas of our business,” says Wright.

Read the [full success story here](#).

Chapter 6: How VitalityHealth automates quality assurance with Davies Consulting and CallMiner

Life and health insurer VitalityHealth has a team of more than 550 customer service advisors and manages over 1M calls a year – many of which are highly sensitive, focused on health and life coverage and claims, so it's critical that VitalityHealth's advisors handle these calls correctly.

With a reputation for award-winning customer service to protect, VitalityHealth began to explore the possibility of introducing conversation intelligence to support quality assurance. It wanted a more reliable way to quality assure the high volume of calls, both in terms of compliance and the customer experience.

Seeking an alternative to call listening

VitalityHealth's quality assurance team is focused on ensuring a consistent, high quality performance from its customer service advisors. In the past, the large team had to spend considerable amounts of time listening back to call recordings to check whether advisors had asked all relevant questions and covered terms and conditions.

To transform the process and help use quality automation (QA) to actively enhance the customer experience, VitalityHealth wanted to introduce conversation intelligence technology, so it could generate insights about advisor performance across more calls, more of the time.

Managed analytics built on industry-leading platform

VitalityHealth selected Davies Consulting to help assess its requirements and business needs. The partnership between CallMiner and Davies enabled VitalityHealth to implement the industry's leading conversation intelligence solution with the managed analytics services the business demanded.

After implementation, the first task was to focus on QA. Every call is now recorded, transcribed and analyzed for key terms that relate to the quality monitoring, with detailed reports being shared regularly with VitalityHealth to help it track quality against business targets.

As well as providing an overall picture of quality, the system supports individual learning and development. Where a call is flagged as raising potential concerns or uncertainties, the VitalityHealth quality team can listen back to the recording or check transcripts.

Because 100% of calls are being analyzed, the VitalityHealth quality team is able to consider the context of each advisor's wider work. Calls are assessed in three areas: regulatory, which everybody in the industry is doing; service excellence, which is about tone, empathy and how the call was opened and closed; and process assurance. The response of advisors has been extremely positive, as they recognize this as a more objective and constructive way of looking at their performance.

Davies Consulting's input has meant VitalityHealth can now quantify advisor performance against a range of quality metrics, which provides the VitalityHealth team with a far richer understanding of the customer experience in real-time. VitalityHealth can then use the call data as the basis for highly focused individual coaching for advisors – which is far more effective, as it's personalized to them.

Read the [**full success story here.**](#)

Three tips to getting started with your own business transformation with conversation intelligence

1. Gaining executive buy-in on a conversation intelligence program is an important first step to achieving enterprise-wide transformation. It's critical that business stakeholders know how to act on the insights revealed from customer conversations. That starts by laying the groundwork and educating key stakeholders on the value of these insights, and how they can be applied to business performance improvements.
2. Never underestimate the power of starting with the basics. The BPO division of NTT started their data analysis with baseline QA, helping their agents drive performance improvements. From there VoC insights helped them drive measurable business results for their clients, including improved sales outcomes, along with improved customer satisfaction and retention.
3. As UPMC shows, it's critical to engage agents when you're adopting a new technology solution like conversation intelligence. By gamifying adoption and making it lighthearted (and even a little competitive), the team was able to increase agent engagement, helping them see this technology as a resource to help with their day-to-day jobs. Beyond the contact center, conversation intelligence insights are shared cross-departmentally with marketing and other teams.

Transforming customer insights into enterprise- wide value

Conversation intelligence isn't just for the contact center.

As you've seen from these stories, the insights from customer conversations can inform business decisions enterprise-side. In the process of engaging with your customers, you may discover improvements to the CX that span far beyond the original intentions of your conversation intelligence program. Whether that's freeing up more time for supervisors to become strategic advisors, helping your sales team close more deals, improving the healthcare offerings you deliver to patients, or something else entirely.

About CallMiner

CallMiner is the global leader in conversation intelligence to drive business performance improvement. Powered by artificial intelligence and machine learning, CallMiner delivers the industry's most comprehensive platform to analyze omnichannel customer interactions at scale, allowing organizations to interpret sentiment and identify patterns to reveal deep understanding from every conversation.

By connecting the dots between insights and action, CallMiner enables companies to identify areas of opportunity to drive business improvement, growth and transformational change more effectively than ever before. CallMiner is trusted by the world's leading organizations across retail, financial services, healthcare and insurance, travel and hospitality, and more.



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