



Five Steps to Mastering Conversation Intelligence for Transformative Growth

A practical guide to elevating
your contact center from a
cost-center to a value driver

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Introduction

Many organizations choose AI-based technology, such as conversation intelligence, to help scale the capabilities of their contact center. The reasons for selecting this technology often start on the practical side, such as the desire to reduce average handle time (AHT), improve agent performance, or other traditional key performance indicators (KPIs). But, over time, contact center teams often discover that customer insights can inform strategic decisions around more than just operational efficiency, such as customer experience (CX) and other cross-departmental initiatives.

Teams that embrace the potential for conversation intelligence to drive enterprise-wide improvement are at a distinct advantage. But we all know that there is rarely success in trying to boil the ocean – instead, starting with practical use cases can demonstrate a near-instant ROI for AI, leading to its successful rollout in other areas.



This can include:

- **Quality assurance (QA):** Most contact centers do manual QA monitoring. Typical QA analysts can often only listen to **3 to 5 random calls** per agent, per month – less than 1% of overall interactions.
- **Agent coaching and guidance:** At least 20% of calls today have coaching opportunities. Using a data-driven approach to delivering feedback gives agents more confidence in their existing expertise and areas for improvement, leading to better employee satisfaction and retention.

A successful and strategic conversation intelligence rollout might start by focusing on a few practical areas, such as the ones above. From there, teams can leverage customer insights organization-wide. Let's explore some of the steps it takes to successfully implement conversation intelligence at your organization:

1. Setting the right objectives to measure success
2. Getting team buy-in
3. Starting with low-hanging fruit to generate immediate value
4. Sharing data beyond the contact center
5. Embracing a mindset of continuous improvement

The value of unsolicited feedback

Many teams rely on solicited feedback mechanisms like surveys or reviews to understand the voice of the customer (VoC). According to the **CallMiner CX Landscape Report**, the majority of organizations are still collecting mostly solicited CX and customer satisfaction feedback (71% in 2023 vs. 79% in 2022).

The problem with that approach? Solicited feedback only captures a partial CX picture. It tends to represent only a customer's highs and lows – and sometimes that is a perceived reality vs. how they were treated or their actual outcome. To contrast, unsolicited feedback obtained via everyday customer conversations, such as those that happen via a contact or customer service center, can successfully augment solicited feedback, giving organizations a truer, more comprehensive picture of VoC. This feedback can be leveraged to drive targeted agent coaching opportunities and improve CX outcomes – and used well beyond the contact center to drive business improvements.



1. Set the right objectives to measure success

While it sounds like a no-brainer, it's hard to drive a successful program without defining what success looks like in the first place. Before setting out on your conversation intelligence implementation, think about the metrics that matter most to your business. Do your best to align your objectives with the capabilities of your conversation intelligence solution.

For example, **Provana**, a conversation intelligence consultancy specializing in the collections space, recommends breaking down goals in the following ways:

Policy: Your policy can either be internal or external. For example, if you operate in a highly regulated industry, your top external goal may be to improve compliance outcomes. Conversation intelligence can help by making sure disclosures are happening appropriately, both in real time or caught and remedied via post-interaction analytics. Or, your top goal may be to understand whether your internal procedures and best-practices are being followed. Conversation intelligence surfaces critical insights and makes sure agents are following policy.

Productivity: Conversation intelligence can unlock significant value when it comes to block-and-tackle productivity outcomes. For example, understanding average handle times (AHTs) or silence times may give your team insight into some of the causes of lower productivity. Conversation intelligence systems can go deeper to listen for key things that could require more training (e.g. an agent struggling to identify or validate a customer). The ultimate goal may be to increase the number of contacts handled, without having to add more agents.

Performance: Conversation intelligence can also unlock value for your team by analyzing what agents are doing well and what needs improvement. Your team can gain a greater understanding at scale about certain complexities like objection-handling, sales techniques, ways of empathetically responding to vulnerable customers, and more. Pointing out successes and areas of improvement, backed by data, can correlate contact handling to better outcomes.

Setting goals beyond the contact center

While most of your direct conversations with customers might happen in the contact center, you can (and should) leverage the insights obtained from those interactions enterprise-wide. It's important to set goals around how you'll use these insights to drive effective change and business value across functions. Here are three examples of potential departmental goals:

- **Marketing:** Improving marketing campaign effectiveness based on customer feedback/reaction or reducing risk of brand crisis
- **Sales:** Driving more successful sales outcomes by uncovering behaviors that lead to conversions
- **Product:** Understanding customer feedback on products to inform development decisions, reduce warranty claims and more

2. Get team buy-in

Implementing conversation intelligence can be transformative, but only if the right teams at your organization are bought in. This includes executives, managers, and day-to-day employees. For example, getting buy-in from agents will ensure that the solution is adopted at a scale, and that it is perceived as helpful vs. hindering progress. To secure larger scale executive buy-in, showing them the results and ROI of an initial initiative may help your solution gain momentum and traction throughout the organization.

Making agent buy-in fun

University of Pittsburgh Medical Center (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 agent concierges received daily, instead of weekly, and measured them on key benchmarks including:

- **Introduction** – Did the concierge provide the appropriate greeting and take ownership of the call?
- **Closing** – Did the concierge summarize and end the call appropriately with the member?
- **Empathy** – Did the concierge create a connection with the member by responding to their experience?
- **Appointment scheduling** – Did the concierge attempt to schedule a provider appointment when the opportunity was presented?
- **Web mentions** – Did the concierge recommend self-service tools through the UPMC website or mobile app?

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 Cori Hoff, customer engagement manager, UPMC. "Our strategy pulls in a lot of engagement, and makes our concierges laugh and have fun."

3. Start with easy wins to generate immediate value

With a powerful solution like conversation intelligence, it can be tempting to want to do everything at once and take on too much. Instead, to start, focus on one area where you can make impact at a baseline level, before expanding to more use cases.

A great example is compliance. As referenced above, most teams still rely on manual QA, and are only able to analyze a fraction of total customer interactions coming into the contact center. With conversation intelligence, you can automate some of the mundane parts of the **QA process**, analyze 100% of omnichannel interactions, and implement data-driven coaching for agents who may need improvement around compliance objectives.

Whether you're observing insights from customer interactions in real time or post-interaction, analytics can help you understand every part of the conversation rather than keywords alone. The result is actionable insights presented via a dashboard with customizable scorecard metrics.

Quality metrics from conversation intelligence systems enable contact centers to identify exactly where agents need help, and continuously measure progress across key performance indicators (KPIs). Quality supervisors can make informed, data-driven decisions when it comes to process adherence, compliance, and need for supplemental coaching or training. Automated scorecards can save hours of "needle in a haystack" searching through thousands or even millions of interactions by quickly retrieving exact examples of an agent's behavior in seconds. And for a use case like compliance, you can tie improvements back to money saved such as through a reduction in complaints or improvement in regulation adherence.

After executives see the results from an initiative like compliance, they will be more likely to greenlight the solution for other areas of the business.

How to scale a conversation intelligence program

Dunlop Sports partnered with speech analytics consultancy Zenylitics to break an ambitious conversation intelligence program (powered by the CallMiner platform) into measurable results. Zenylitics calls this approach “Iteration Zero.”

For its initial project charter, the Dunlop Sports team decided to start with the phone channel for six months and expand gradually into other omnichannel customer interactions such as chat, tickets, and more. The initial part of their program included a calibration phase for the conversation intelligence system to establish call reasons and conversation topics, and incorporate the right language and industry-specific jargon. In their case, the system was targeted toward golf and racket sports.

After six months, the team added channels to the conversation intelligence system one at a time. This type of approach can empower teams to analyze full omnichannel data, and even blend contact center data into a larger data and analytics program. Focusing on a single area of improvement in the contact center makes it much simpler to prove the value and ROI of conversation intelligence. For example, the percentage of silence can make an immediate impact on AHTs and customer satisfaction scores (CSAT).

From there, the team was able to dig into the “why” – the root cause or drivers – behind high silence times and other key metrics, empowering the team to make data-driven business decisions and improvements.

4. Share data beyond the contact center

According to the [CallMiner CX Landscape Report](#) cited above, 68% of teams say that their CX data is often not harnessed to their organization's best advantage, and 50% lack effective communication between departments. All too often, data collected in the contact center stays there, and valuable customer insights aren't effectively shared among teams.

Start by sharing strategic customer insights cross-functionally. Ask yourself, which data would my teams find most valuable? For example, UPMC's contact center collaborates with its marketing team to share insights that can improve and better align campaigns with their member population.

"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."

The same processes are being used to develop campaigns to ensure people get their flu shots. These types of campaigns not only reduce calls to the contact center, but also help members be healthier. As another example, an accessories company leveraged customer contact data to improve their products. The team used conversation intelligence to understand exactly where issues were occurring in the product lines, so corrections could be made within product development. From there, product stock for warranty replacements and new sales could be updated appropriately. Taking immediate action on these trends helped avoid costly recalls and potential product safety issues.

5. Embrace a mindset of continuous improvement

In the context of a conversation intelligence program, continuous improvement means starting at a baseline, and continuously evolving to scale and drive additional improvements. A continuous improvement mindset never rests on its laurels; there's always something more your team could optimize in the interest of customer excellence. For example, Provana helped one of their collections clients start with a QA project pilot, driving agent performance improvements and better compliance adherence.

After they mastered this baseline, they started to expand adoption gradually to other processes and stakeholders. Now, they sync their conversation intelligence data with a business intelligence system to make changes that impact overall business performance.

Not only have they achieved cost savings from automating QA efforts, they've driven continuous agent improvements and new incentive models based on performance. The team can reinvest their time into more strategic initiatives, instead of manually reviewing calls. Expanding the use of conversation intelligence across departments can offer a distinct advantage. It's important to zoom out of the day-to-day picture to understand its strategic value. With a conversation intelligence platform, teams can leverage executive reporting to better understand customer insights at a high level. In addition, tapping into customer insights to understand VoC can help CX teams remove points of friction in the customer journey.

Pro tips for a successful conversation intelligence implementation

Here are five pro tips you can use to get more out of your conversation intelligence rollout:

1. Set practical goals that map to your business objectives (e.g. improving CSAT scores, AHTs, silence times, etc.)
2. Get buy-in from both executive stakeholders and day-to-day users to increase adoption and understanding of the value of conversation intelligence
3. Start with a measurable project that can drive immediate value and ROI (e.g. QA) before expanding to more complex use cases
4. Share data beyond the contact center to improve VoC or department-specific initiatives that require unsolicited customer feedback to augment solicited feedback
5. Embrace a mindset of continuous improvement to ensure ongoing value in the contact center and beyond

By pursuing this strategy, you'll gain immediate ROI from your AI-based conversation intelligence system, transforming your contact center from a cost center to a value driver for your entire organization.

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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Corporate Headquarters

200 West Street
Waltham, MA 02451
+1 781 547 5690

Sales

sales@callminer.com

Social

[facebook.com/callminer,inc.](https://facebook.com/callminer,inc)

twitter.com/callminer

linkedin.com/company/callminer