

BEYOND METRICS . . ELEVATING QUALITY AND WORKFORCE ENGAGEMENT

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**October 2025
Roundtable**



Beyond The Metrics

Elevating Quality & Workforce Management

In Partnership With:

Crmx
change

Welcome, Let's Get Acquainted!

Where (Geographically) Are You
Joining Us From Today?



Who We Are

The WFM People™

Solid Rock Consulting is a Workforce Optimization (WFO) consulting firm founded in 2012.

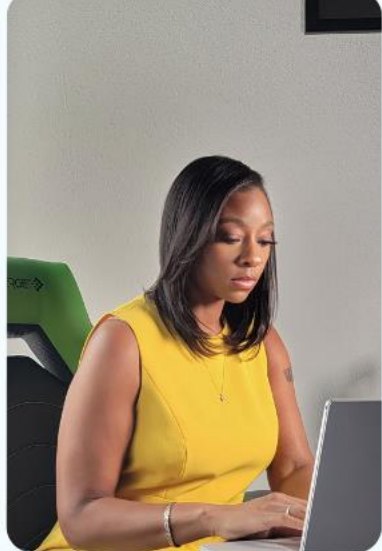
We **Transform** our clients' organizations and customer experiences by ensuring they have the right resources, in the right place, at the right time!

We do this through the 3 core pillars of our service:
WFM Support, Professional Services, and Solution Procurement.

What Will We Cover Today?

- Why traditional metrics (SL, ASA, Occupancy) create a false sense of confidence.
- How to align Quality & WEM with evolving business and customer goals.
- The **top 2 mistakes** most leaders make (and how to avoid them!)





Juanita Coley

SOLIDROCK CONSULTING, CEO
THEE CONTACT CENTER WHISPERER
Author of “WFM Go Beyond”

Recognized industry leader & award winner:

- Mrs. Corporate America 2022
- 2022 Most Influential Tech Advisor
- 2022 Top 25 Thought Leader

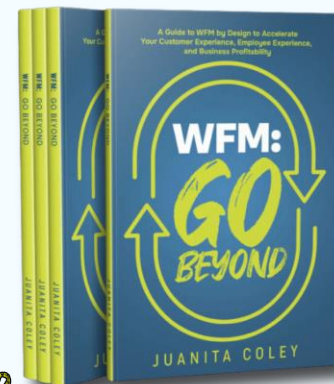
Over 20 years of expertise in WFM, driving efficiencies for brands like:

- United HealthCare
- Optum
- Walgreens
- Liberty Medical

Consulted for top WFM providers, including Verint and Aspect. Global presence—leading a team of consultants across the US, Canada, and EMEA.



WFM: GO BEYOND



SOLID ROCK
CONSULTING

Let's Play A Game!

In your OWN words...

What's does going
BEYOND the Metrics
mean to YOU?



Let's Talk About The Real Problems...

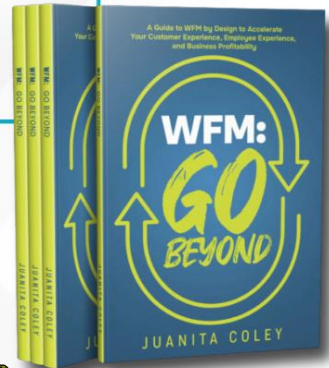
👁️ It's *not* just about tracking numbers...

It's that traditional metrics often give us a **false sense of success** instead of real impact.



The 3 Real Issues with relying on Traditional Metrics...

- **False Confidence**
We hit Service Level, ASA, or Occupancy goals and think we're winning—while customer satisfaction and employee engagement are slipping.
- **Conflicting Goals**
Operational KPIs often clash with leadership priorities (cost-to-serve, growth, retention), leaving leaders frustrated.
- **Surface-Level Focus**
Metrics measure activity, not outcomes. We track what's easy, instead of what truly drives CX, EX, and business success.



The **top 2 mistakes** most leaders make (and how to avoid them!)



#1 – Not Having CLEAR Data:

🚩 What This Looks Like:

- Drowning in dashboards, but still can't answer “*what happened and why?*”
- Data is siloed across departments, leaving leaders reacting, not predicting.

✅ What to do instead:

- Adopt the **CLEAR framework** to ensure data is **Collected, Linked, Evaluated, Assessable, Retained**.
- Establish a single source of truth for operational and leadership reporting.
- Use maturity assessments to move from raw data → actionable insights.

📄 *This is step one in going beyond metrics.*

QR Code to CLEAR
Framework Opt-in

#2 – Overreliance on “Industry Standard” Metrics

🚩 What This Looks Like:

- Obsessed with Service Level, ASA, and Occupancy alone.
- Leaders celebrate hitting “green” KPIs while CX, EX, or revenue tell a different story.
- *begins.*

✅ What to do instead:

- Shift focus from isolated KPIs to **strategic alignment**.
- Apply the **IACT framework** to connect WEM & Quality programs directly to business outcomes.
- Evaluate success based on CX + EX impact, not just operational activity.

📘 *This is where scorecards stop—and strategic alignment begins.*

QR Code to IACT
Framework Opt-in

Redefining Quality & WEM



Quality = not random sampling, but intentional alignment with customer goals.



WEM = not just schedules, but how empowered agents are to deliver outcomes.

Key Takeaways To Remember:

🔑 Metrics ≠ Outcomes

- SL, ASA, and Occupancy are surface indicators.
- Don't let "green dashboards" give you a false sense of success.

🔑 Ensure CLEAR Data

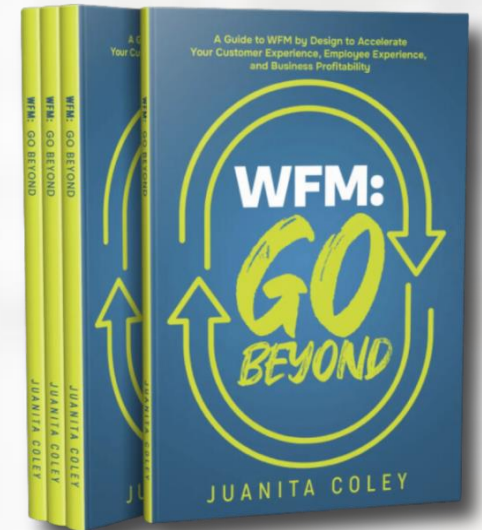
- Move from **information** → **insights**.
- Data maturity is the foundation for visibility and confident decisions.

🔑 Leverage IACT Framework

- Move from setup & scorecards → strategic alignment.
- Connect WEM & Quality directly to business outcomes.



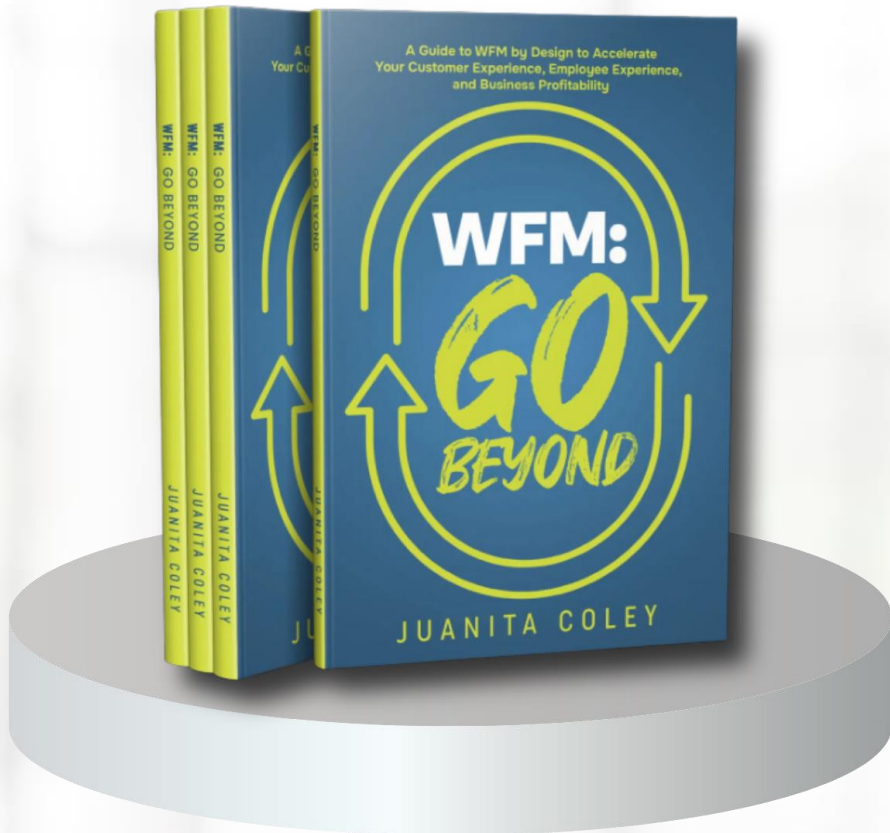
WFM: GO BEYOND



Your Free Gift For Attending LIVE!

 **LIVE ATTENDEES ONLY!**

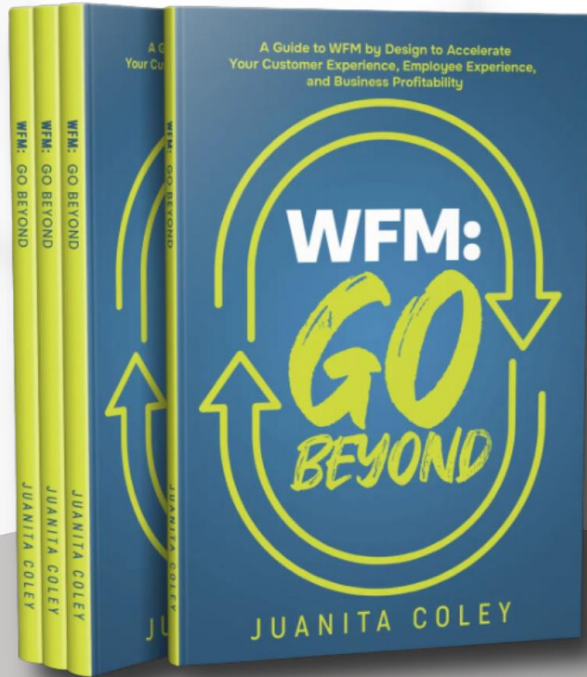
 **WFM: Go Beyond Book** (Physical or Digital Copy) – **Valued at: \$29.99**



WFM: GO BEYOND

***Must Be Ordered or Downloaded by 2:00PM Today!**

★ 24 Hour Upgrade BONUSES You'll See on the Next Page *(Live Attendee Exclusive)*:



📖 Accompanying **WFM Go Beyond Workbook**
Valued at - \$25 (Your Offer \$15)

📊 **Customer & Contact Ratio Template + Training**
Valued at - \$2,000 (Your Offer \$49.99)

🎓 The **WFM Fundamentals Course** - \$1,250
Valued at - \$1,250 (Your Offer \$299)

👥 Access to the **Private Go Beyond Community**
Valued at - \$13,000 (Your Offer FREE)

★ **Total Value:**
\$16,000+



WFM: GO BEYOND

Thank You For Joining Us!

💡 **WFM is no longer a support function — it's a leadership advantage.**
Let's lead with strategy, not just metrics!

Next Step:

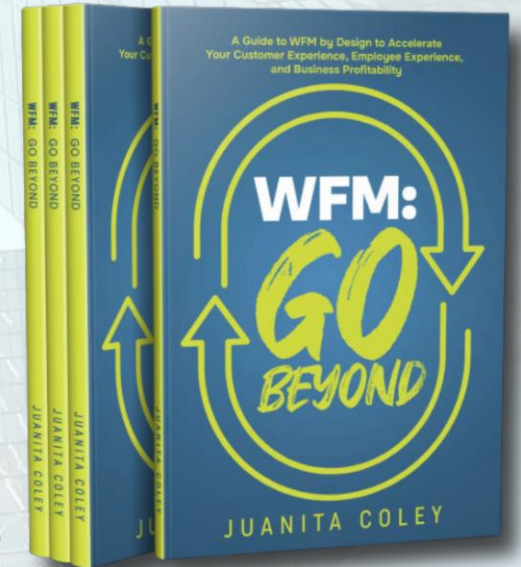
Grab your *WFM: Go Beyond* LIVE Bonus Bundle now!

👁️ **More Questions? Want to work together?**
Visit Us Online: solidrockco.net

💖 With Love,
Juanita Coley
The Contact Center Whisperer™
That WFM Girl™



WFM: GO BEYOND





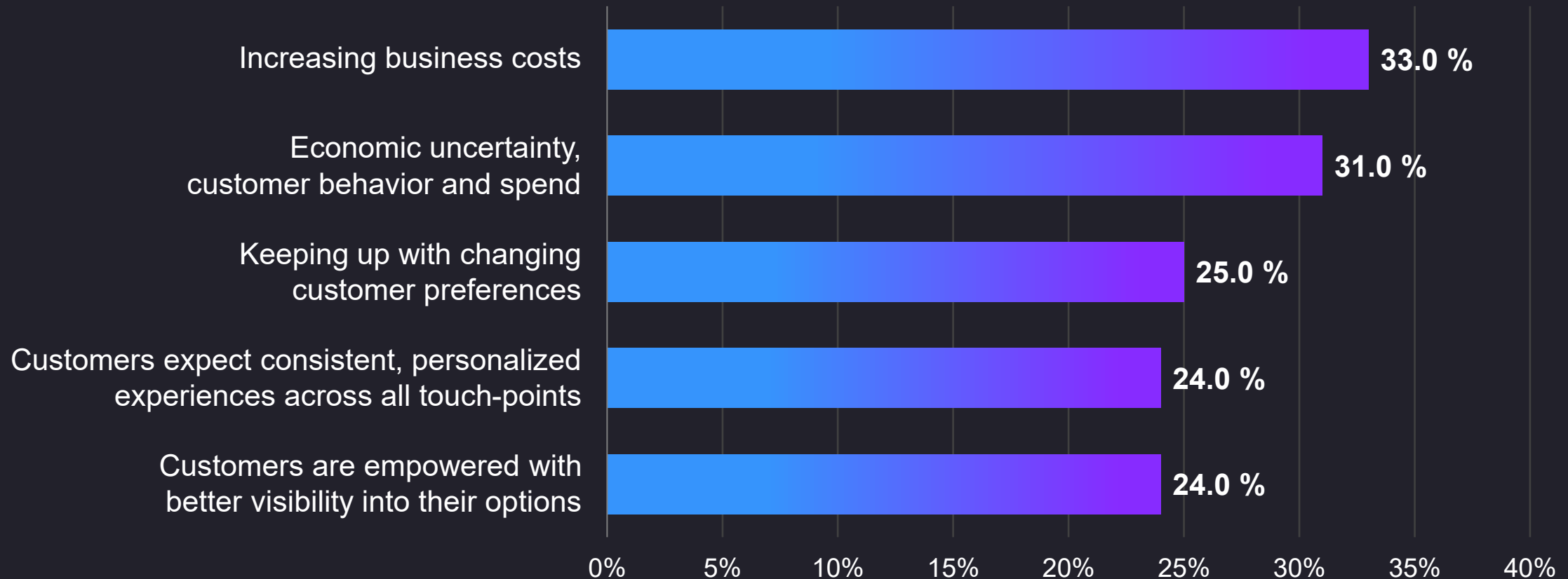
Beyond metrics: elevating quality and workforce engagement

Liran Meir Frenkel, Head of Product Marketing, SmartReach



CX leaders struggle adapting to changing business conditions and customer expectations

What are the main challenges CX leaders are handling these days?

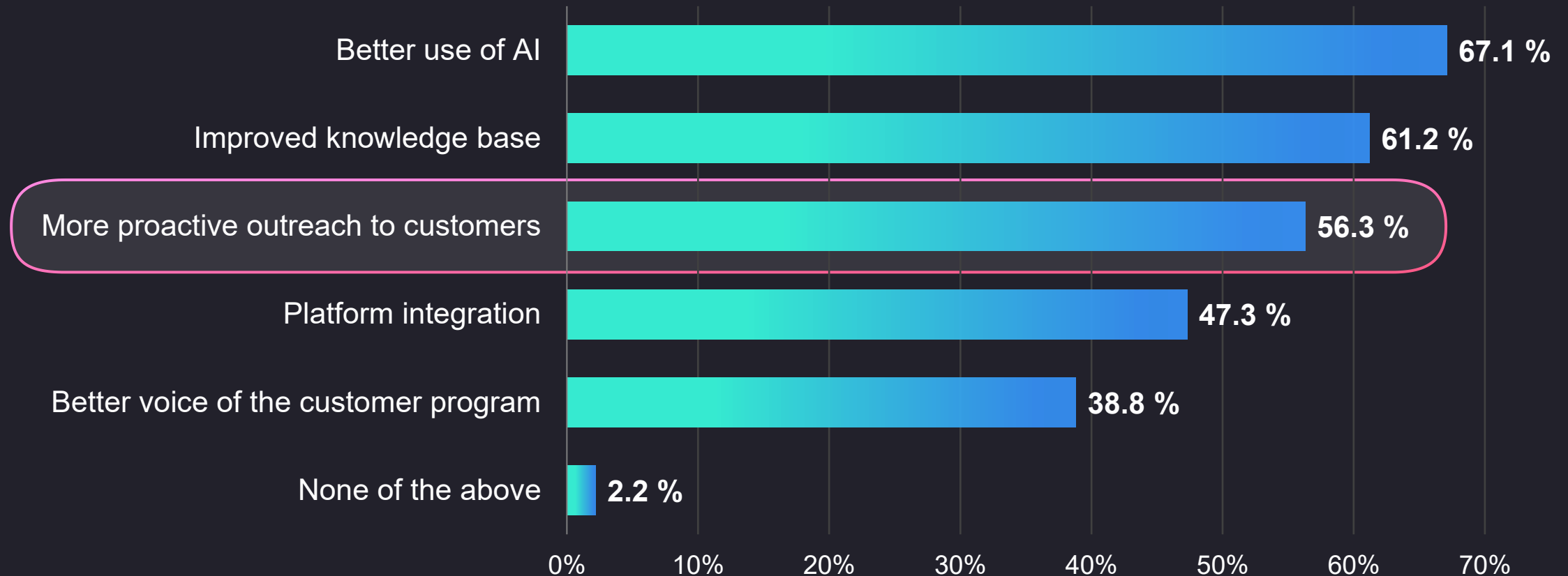


Percent of respondents, n=332

Source: Proactive Engagement: Transform CX with Future-Ready, Intelligent Conversations, Aberdeen, July 2025

AI, knowledge base, proactive outreach: top tech reasons for CX boost

What technologies have improved your customer service?



**Aberdeen: By 2027,
nearly 3 out of 4
companies will likely use
proactive engagement.**

Free up employees

for what matters



“Customers expect friction-free digital-first engagement that values their time and effectively engages them for **both inbound and outbound interactions.**”

FORRESTER®

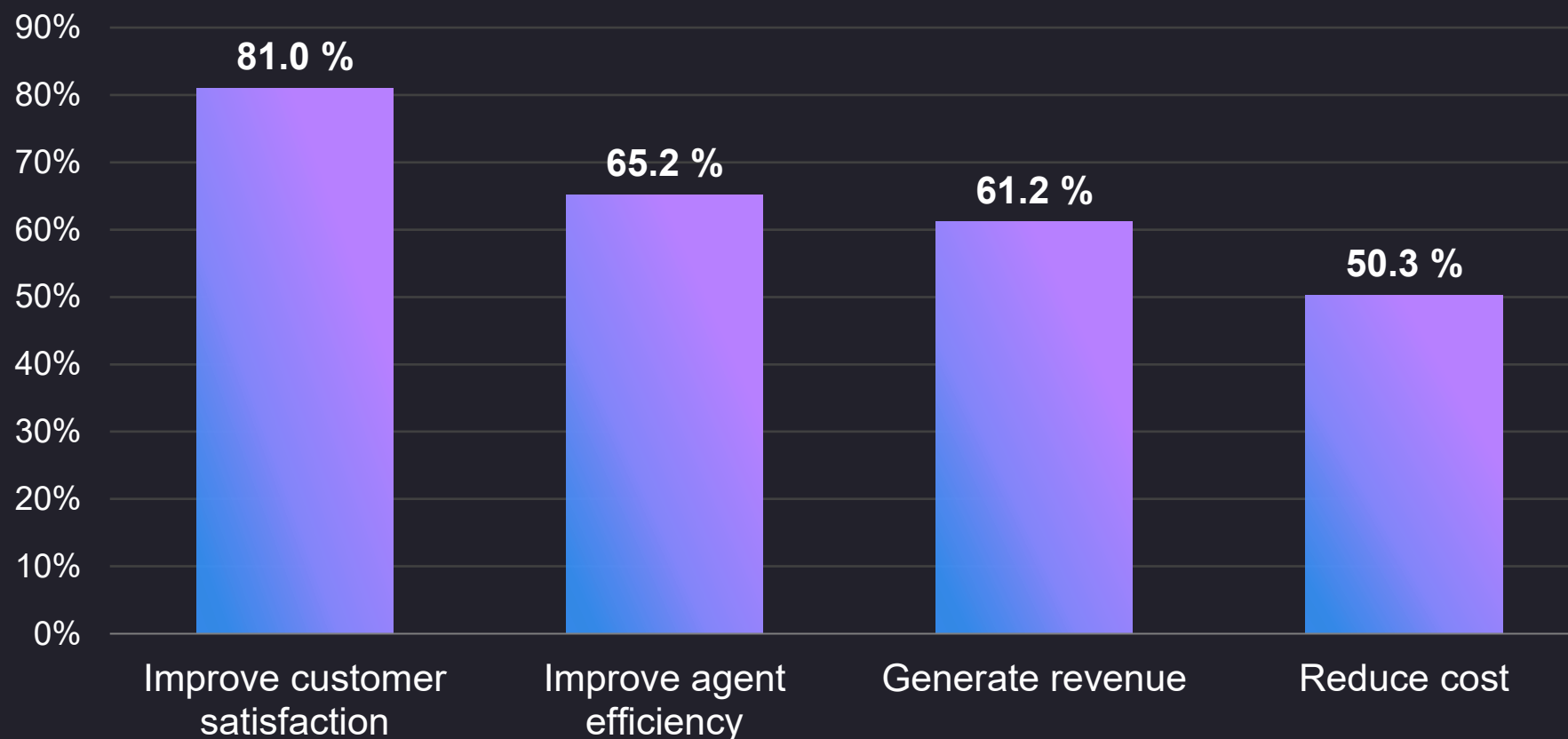


NiCE

Improved CSAT is the top benefit of proactive outreach



Which of the following benefits does your company realize through proactive outreach?



From efficiency to revenue: the metrics that matter



Operational Efficiency & Reduced Costs

- **Automated workflows** cut manual effort nearly in half, freeing agents to focus on conversations instead of repetitive tasks.
- **Faster campaign launches** deliver quicker responses to business needs.
Example: A financial services provider achieved **+70% outbound attempts, +46% connects** after eliminating manual setup.
- **Agent Assist** drives efficiency with real-time guidance - boosting OCR and cutting handle times by **5% within** months of deployment.

Generate Revenue & Improve CSAT

- Advanced **segmentation and dynamic flows** ensure the right message reaches the right customer at the right time.
Example: An automotive financial services provider saw 74% lower **abandon rates** and **+28% right-party connects**.
- AI-powered best-time-to-contact and branded caller ID improve engagement, **driving 18-45% higher connect rates across industries**.
- Financial impact: smarter, data-driven outreach have **increased promise-to-pay rates by 54%**, directly lifting revenue recovery.

Proactive outreach opportunities can be found everywhere



**Customer
acquisition**



**Customer
relationship &
growth**



**Financial
engagement**



**Proactive
care**



**CX
enhancement**

Ready to tackle proactive outreach challenges?



**Evolving Compliance
and Regulation**



**Low Consumer
Engagement**



**Personnel and
Resource Constraints**



**Complex Agent
Experience**



**Inadequate Platform
Capacity**

Create a
NiCE
world



Thank You

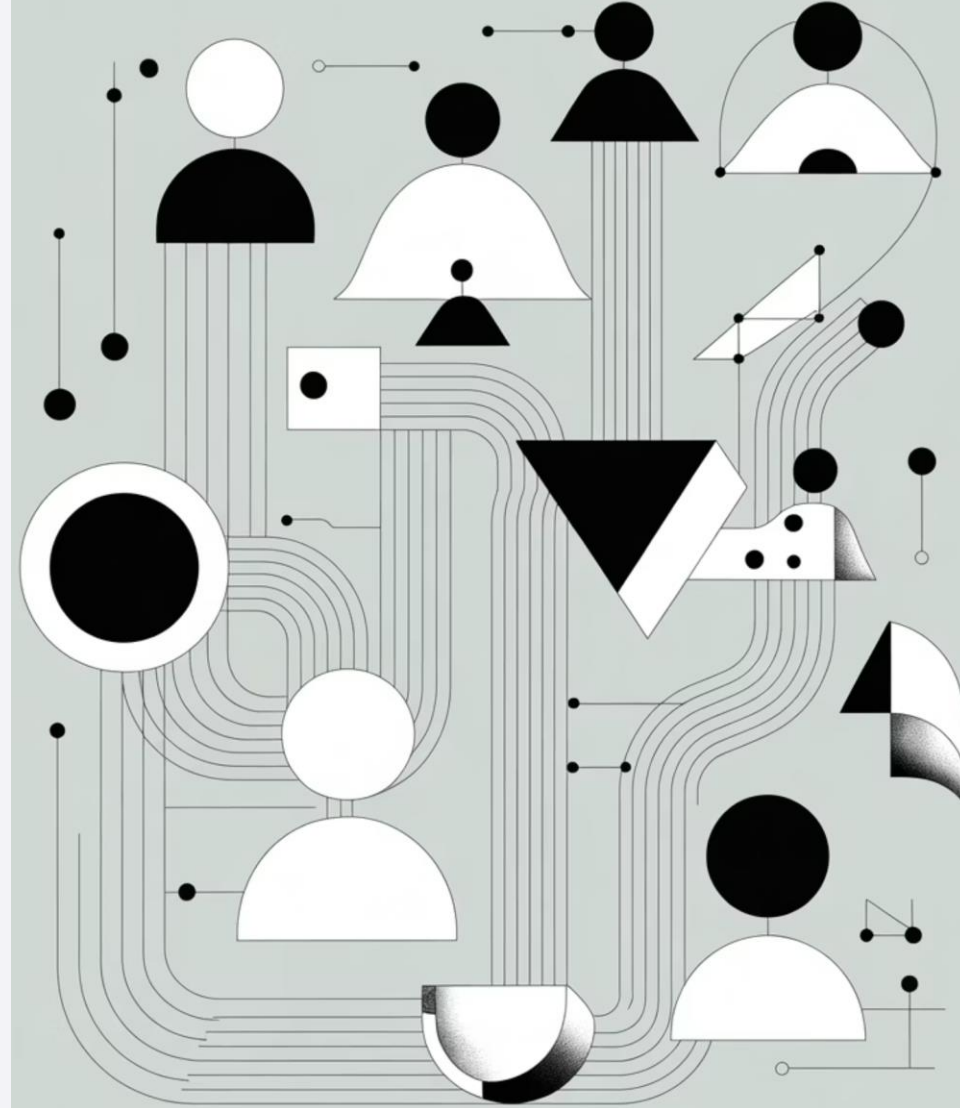


Beyond Metrics: Elevating Quality & Workforce Engagement

Turning CX, Analytics & AI into Measurable Growth

Do you have a 360-degree view of your customer?

Answer in chat: How do you currently gather customer insights, and what value do these practices bring to your organization?



From Metrics to Meaning

Analytics platforms now connect operational data, workforce engagement, and CX outcomes

The Evolution: Four Dimensions of Intelligence



Quality Management

Traditional metric: QA scores, error rates

New interpretation: Correlate QA trends with CSAT and churn patterns

Real insight: Prove whether quality actually drives customer loyalty



Workforce Engagement

Traditional metric: Adherence percentages, coaching hours logged

New interpretation: Layer with employee sentiment and retention data

Real insight: Identify burnout risk before it impacts performance—measure coaching ROI



CX / EX Intersection

Traditional metric: CSAT, NPS, First Call Resolution

New interpretation: Cross-map with journey and sentiment analytics

Real insight: Pinpoint which specific experiences create satisfaction or drive frustration



Analytics Overlay

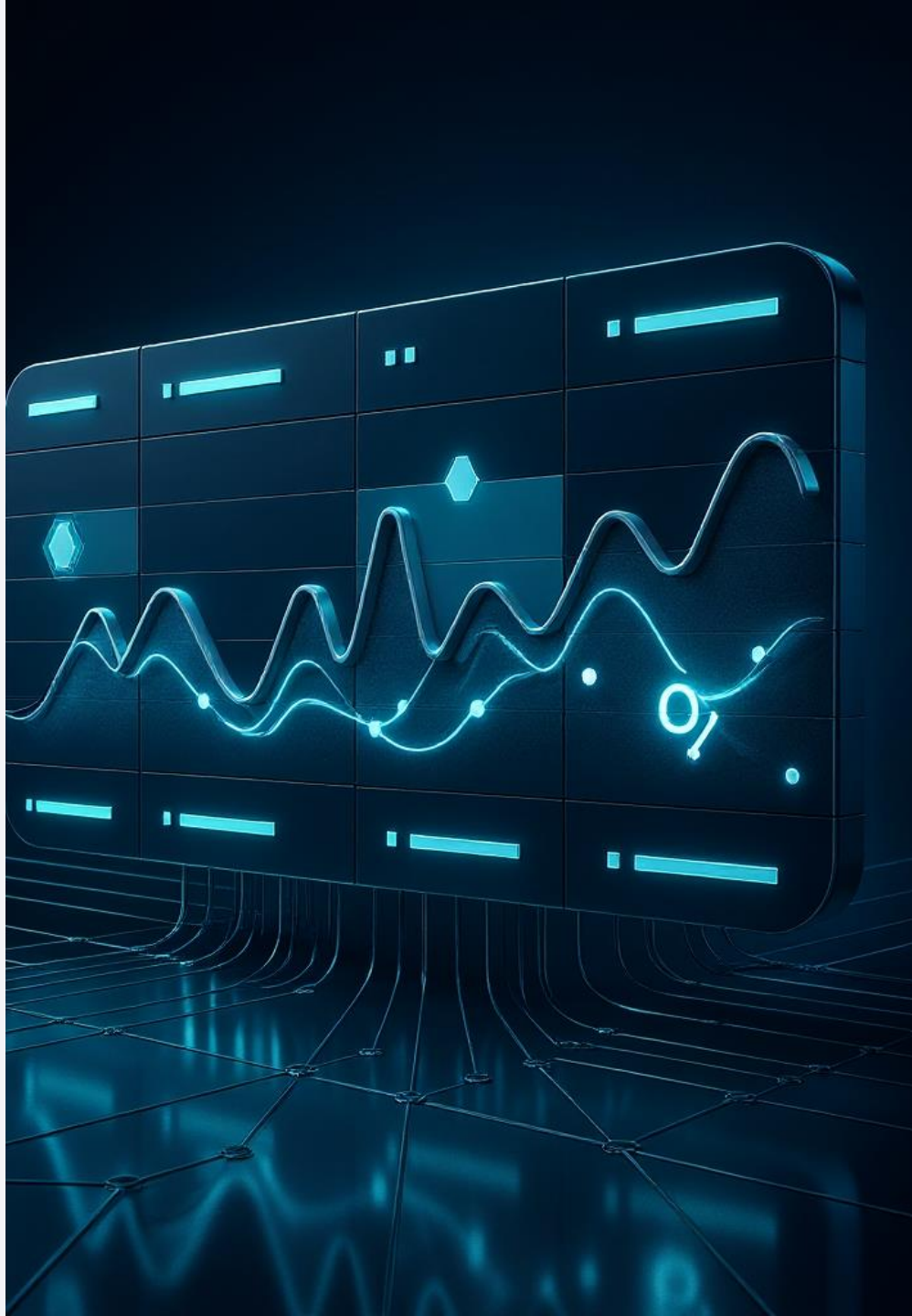
Traditional metric: Siloed quality, sentiment, revenue tracking

New interpretation: Correlate all outcomes in real-time across platforms

Real insight: Reveal exactly how workforce engagement impacts revenue and customer trust




12% Renewal Rate Increase

...when QA coaching occurs within **24 hours** of a low-sentiment interaction



Prescriptive Analytics & Agentic AI

From data to decisions

- **Predictive AI**
Forecast customer behavior and risk patterns
- **Prescriptive AI**
Deliver Next Best Action recommendations in real-time
- **Agent Empowerment**
Agent coaching aligned with revenue drivers

+12%

**Subscription
Renewals**
AI-driven retention
strategies

22%

Faster Onboarding
Retail efficiency gains

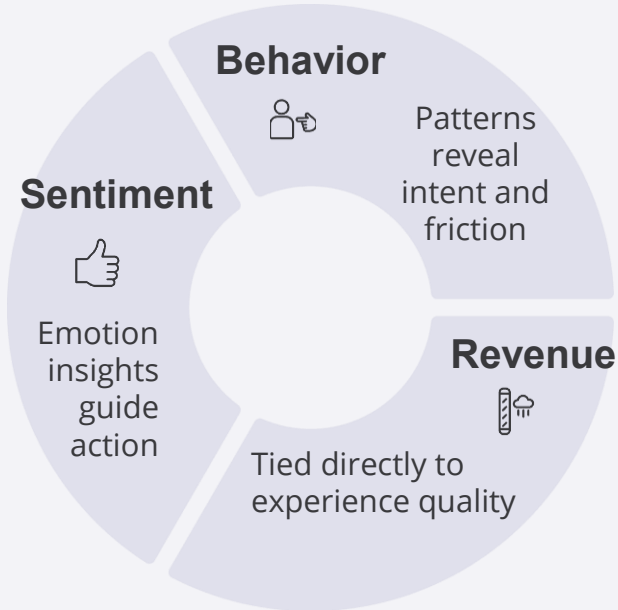
+10

CSAT Improvement
Enhanced customer
satisfaction

What if understanding customer emotions could transform your entire business?



Mastering Experience Economics



Building Future-Ready Capabilities

- **AI-Powered Intelligence**
- **Unified Analytics**
- **Agent Empowerment**
- **Empathy at Scale**



Delivering Tangible ROI

- **ROI Transformation: 135% return** on CX investments.
- **Cost Efficiency: 10-25% reduction** in operational expense.

The CX Growth Formula: From Insights to Impact

Measure & Gain Insights

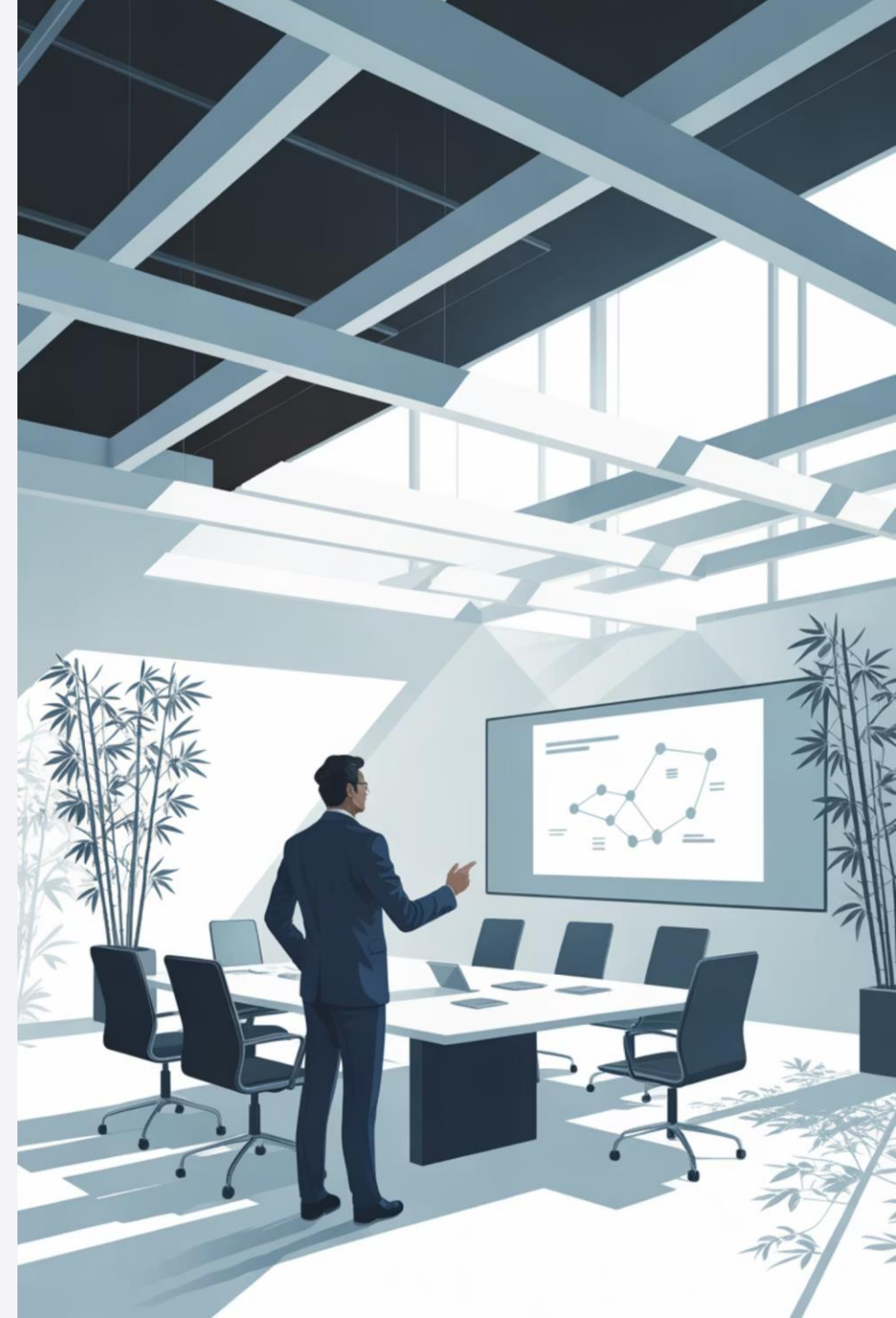
By focusing on outcomes that drive business value, we generate deep customer insights that directly fuel sales pipelines and identify new opportunities.

Connect & Differentiate

Unifying fragmented customer journeys into coherent experiences, powered by unique data sets, builds unparalleled competitive advantages and tailored differentiation.

Transform & Maximize LTV

Transforming our operating model with Quality as a growth lever, Analytics as a storyteller, and AI as a strategic teammate, designs exceptional experiences that foster loyalty and maximize long-term profitability.



Let's Connect

Laura Bassett

Fractional CMO | CX Nerd | CCaaS & AI Insider

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