

**Brian LaRoche, Director, Account
Based Marketing, CallMiner**



**Abby Monaco, Senior Marketing
Manager, NICE Nexidia**



**Mary Moilanen, Business
Intelligence Consultant, Calabrio**



ROUNDTABLE - ANALYTICS AND BUSINESS INTELLIGENCE

MARCH 2018



Best Practices for Analytics and Business Intelligence



Brian LaRoche
Marketing Director



Speech Analytics Best Practices



Identify Your Goals



Measure KPI's?

Improve Operational Efficiency?

Mitigate Compliance Risk?

Identify Customer Likes/Dislikes?

Measure/Improve Agent Performance?

Increase Customer Satisfaction?

Get Leadership on Board

Executive Sponsors

Executives within your organization who support the Speech Analytics program and assist in identifying the specific measurable KPIs in which your Analyst(s) will focus on in order to achieve ROI success are crucial to short and long term success.



Staffing is Essential!

KEY PLAYERS

Executive Sponsor *

- Primary driver for speech analytics
- Provide direction & leadership, builds culture around speech analytics
- Receives executive reports on success/progress

Program Manager *

- Could also be the analyst as a combined role
- Leads identification of the specific measurable KPIs in which Analyst(s) will focus on in order to achieve ROI success
- Manages program focus, timelines, and follow up actions
- Build culture around SA

Program Business Sponsor(s)

- Responsible for participating Lines of Business
- Escalation point for analysts, project managers, business users

Analyst(s) *

- Responsible for content creation, reports and analysis
- Could be combined with Program Manager role

ESSENTIAL ENGAGEMENT PLAYERS



Managers/Trainers

- Responsible for overall improvement and training strategy
- Review performance on all call center levels
- Identify areas of opportunity for training and monitor overall and individual performance

Supervisors/Team Leads

- Responsible for improving and maintaining team performance
- Monitor overall team's and individual agents' performance for targeted coaching

Agents

- Review performance over assigned metrics either individually or in coaching sessions with supervisor and/or trainer

Administrator (I.T.)

- Typically has fundamental understanding of analytics platform & performs specific IT system administration as needed

The Pivotal Role in your Analytics Program is a Dedicated Analyst!



Analyst Role

This full-time position is the critical role for success with your speech analytics program. This can be combined with the Program Manager role but it is the analyst that is accountable for analysis of customer conversations/interactions.

Responsibilities should include understanding the organization's business objectives and goals, analyzing recorded audio and audio/text-based data sets for critical insights, patterns, and trends as well as communicating analysis and proposing solutions to the organization.

Determine KPI's

Examples of KPI's

- First call resolution rate
- Service response times
- Customer satisfaction
- Wait time
- And many more



Appoint an Action Committee

Data collected by speech analytics software is only valuable when you do something with it. Appoint team members to be your action committee.



The action committee reviews the data and identifies customer trends that impact reaching your goal. When they find these trends, it is their responsibility to research why and how you can make changes to fix what is broken.

Create a Process and Stick to It

Established processes and “plays” are the key to having your speech analytics run like a well-oiled machine.



- ✓ Review your procedures before implementing speech analytics software:
- ✓ Determine how the software will change what your employees are responsible for?
- ✓ How will you deal with red flag items?
- ✓ Who will be in charge of making sure the changes presented by the action committee are enforced?

Educate the Team

Have Champions

Before launching, appoint somebody or a group of people to learn the software in its entirety. This group will act as the education liaisons and create a schedule for rolling out the new software as well as training other team members on how to use it.

Create Excitement

How your employees feel about this powerful technology and its positive impact on your agent community and organization overall is largely dependent on how you roll it out to the entire company.



Engage Essential Players



Managers/Trainers

- Responsible for overall improvement and training strategy
- Review performance on all call center levels
- Identify areas of opportunity for training and monitor overall and individual performance

Supervisors/Team Leads

- Responsible for improving and maintaining team performance
- Monitor overall team's and individual agents' performance for targeted coaching

Agents

- Review performance over assigned metrics either individually or in coaching sessions with supervisor and/or trainer

Administrator (I.T.)

- Typically has fundamental understanding of analytics platform & performs specific IT system administration as needed

Report Findings and Actions



Hold regular meetings that include all departments to review the data, KPIs, and goals. Keeping employees in the loop on how new software is improving the company and making their jobs easier is the best way to keep them engaged with the project.

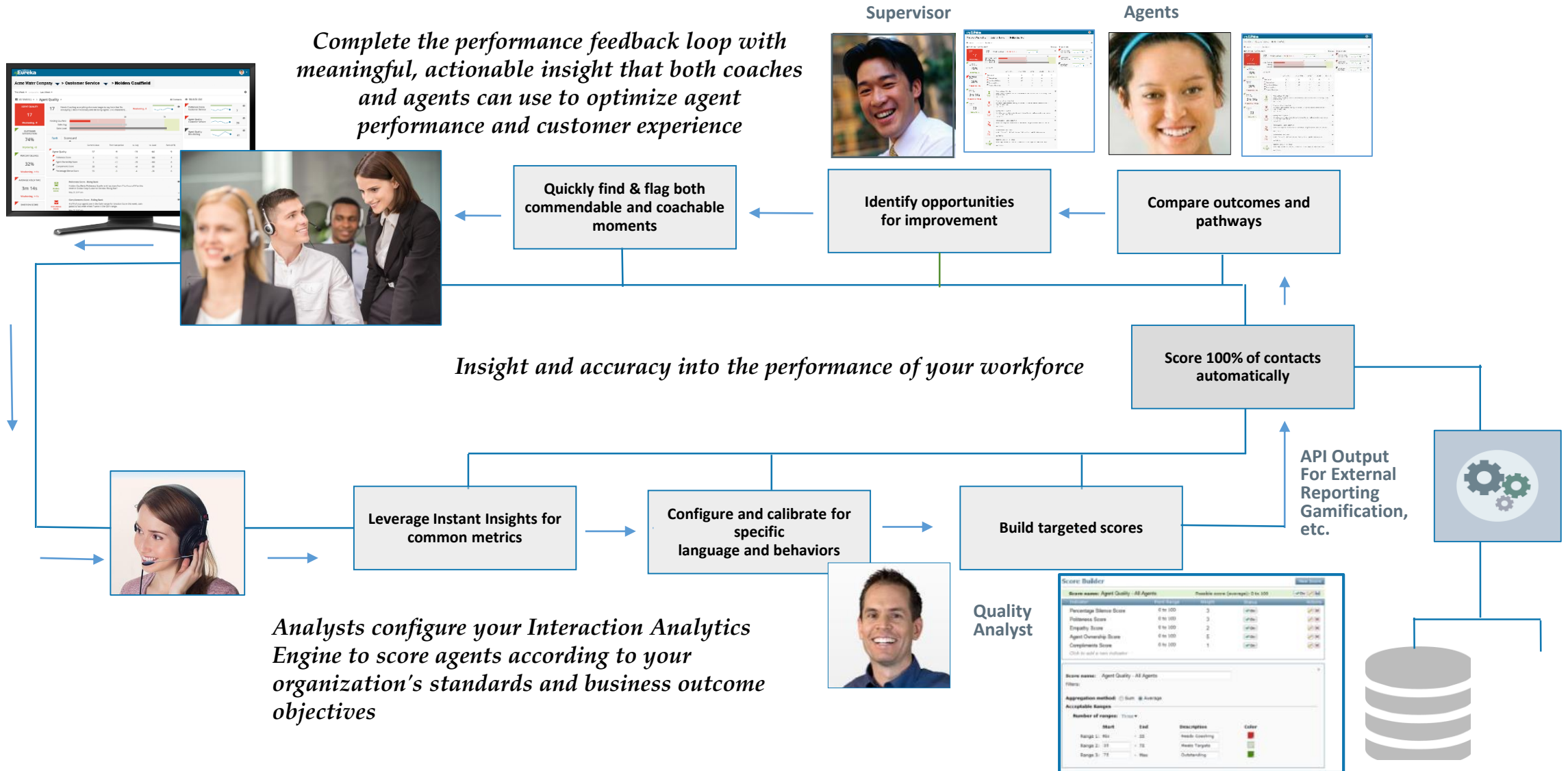
Automate Performance Feedback Loops for both Agents & Managers



Performance metrics should be seen consistently (daily) as a singular view for both supervisors and agents –

This helps our teams be on the same page around individual and team performance ranking data and provides our agents with feedback they can understand and act upon.

Integrate the Feedback Loop Into Your Coaching Program



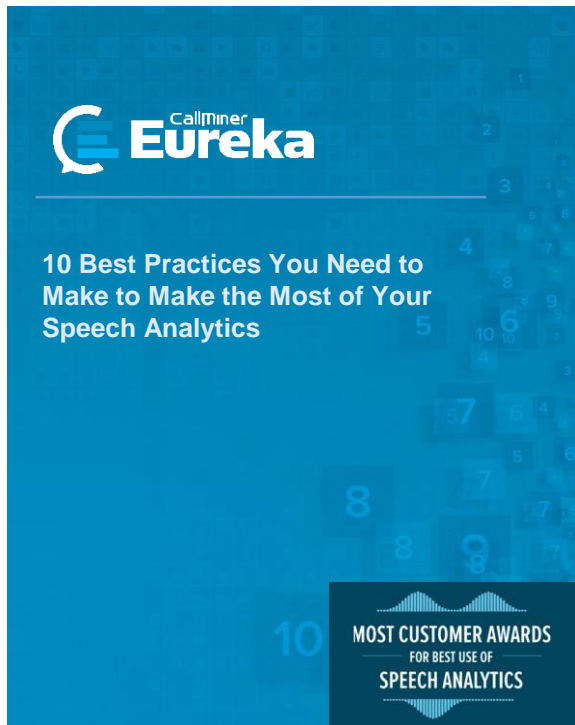
Expand Gradually



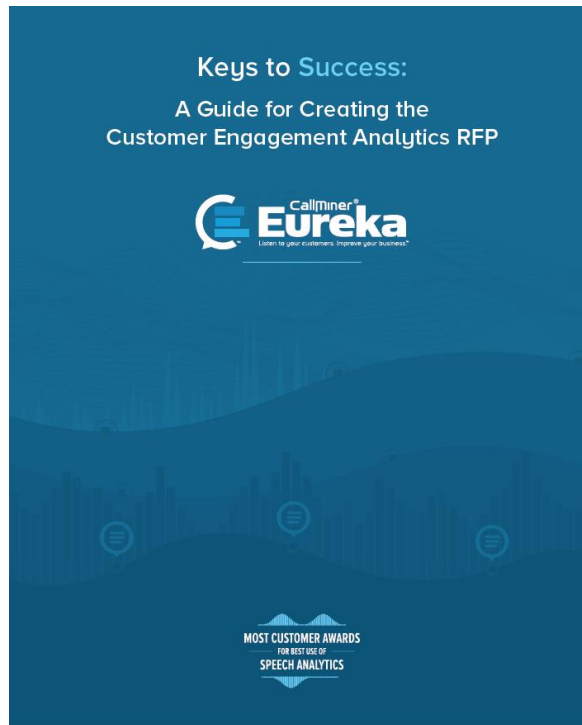
Don't try "to boil the ocean" right of the gate with your Analytics Program

- ❑ Fight the urge (or perhaps stakeholder pressure) to launch several initiatives at once.
- ❑ Start with "low hanging fruit" project opportunities that are not too complex, will yield near time, evident success and provide valuable learning skills to your analytics teams.
- ❑ Beta your deployment to a smaller group initially then launch to the larger community once initial rollout achieves desired results
- ❑ Index subsequent project objectives by level of complexity, opportunity for return on investment and greatest impact to the organization
- ❑ Continued success with your interaction analytics is not only achievable but an expected outcome when you take a practiced approach to program expansion

Visit our Website to Schedule a Demo and Learn More About The Best Practices to Acquire and Implement Speech Analytics Programs to Drive Ideal Business Outcomes



[10 Best Practices You Need to Make the Most of Your Speech Analytics](#)



[A Guide for Creating a Customer Engagement Analytics RFP](#)

Website:
www.callminer.com

Brian A. LaRoche
Marketing Director
Phone: 781-547-4052
Mobile: 781-296-0042
Email: brian.laroche@callminer.com

Twitter:
[@brian13laroche](https://twitter.com/brian13laroche)
[@CallMiner](https://twitter.com/CallMiner)

[**See a Demo!**](#)

Zombie Report Apocalypse!

*Banish the walking dead and bring new
life to your contact center reporting*

Mary Moilanen
Business Intelligence Consultant

Who am I?



Mary Moilanen

Business Intelligence Consultant

- Dog lover and crazy cat lady
- Very slow runner
- Data enthusiast

Agenda

- A brief story
- Spotting zombie reports in the wild
- What turns a report into a zombie?
- Hazards of zombie reports
- How do I survive the apocalypse and build a brave new world?

BASED ON A TRUE STORY

PG-13

PARENTS STRONGLY CAUTIONED

ZOMBIE IMAGERY AND STORIES OF BAD REPORTING

Long ago in a cubicle far, far away



Long ago in a cubicle far, far away



Why zombies?



- Eats brains
- Has rotting flesh
- Clumsy and inefficient
- Takes over the world

A document titled "T.P.S. REPORT COVER SHEET" from "INITECH". The document is a form with various fields for data entry. At the top is the INITECH logo, which consists of three interlocking cubes. Below the logo is the text "INITECH". The main title is "T.P.S. REPORT" in a large, bold, serif font, followed by "COVER SHEET" in a smaller, all-caps, sans-serif font. The form contains several lines of text with blank spaces for input, including "Prepared By:", "Date:", "System:", "Program Language:", "Platform:", "OS:", "Unit Code:", "Customer:", "Unit Code Tested:", "Due Date:", "Approved By:", "Test Date:", "Tested By:", "Total Run Time:", "Total Error Count:", "Error Reference:", "Errors Logged:", "Log Location:", "Passed:", "Moved to Production:", and "Comments:". At the bottom of the form, the word "CONFIDENTIAL" is printed in all caps.

- Numbs brains
- Has rotting content
- Clunky and inefficient
- Takes over your inbox

A field guide to identifying zombie reports

- Unused or rarely used
- Nobody can tell you “the point”
- Does not contain actionable data
- Relied on for only one piece of information
- Part of a package of many reports that cannot be efficiently digested
- Produced using outdated technology



How does a report become a zombie?



- New initiatives
- Changing management
- Old technology
- Fear for job security
- “Just in case” syndrome
- Lack of ownership

Why are zombie reports hazardous?

- Waste of time
 - Analysts
 - Management
- Potential for incorrect information
- Distracting
- Employee dissatisfaction



How do I fight the uprising?

Validate

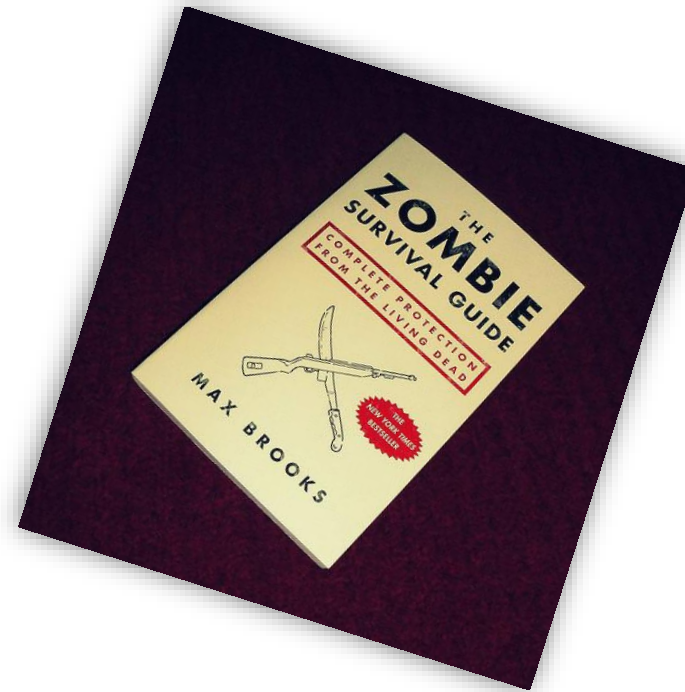
- “We do this because”
- Usage
- Distribution

Simplify

- Fields
- Granularity
- Frequency

Improve

- Formatting
- Multiple data sources
- Automation and new technologies



www.Calabrio.com

mary.moilanen@calabrio.com

BEST PRACTICES WITH ANALYTICS

MARCH 8, 2018



Abby Monaco
Senior Product Manager
Nexidia
amonaco@Nexidia.com



MAKE ANALYTICS
PART OF YOUR
NATURE

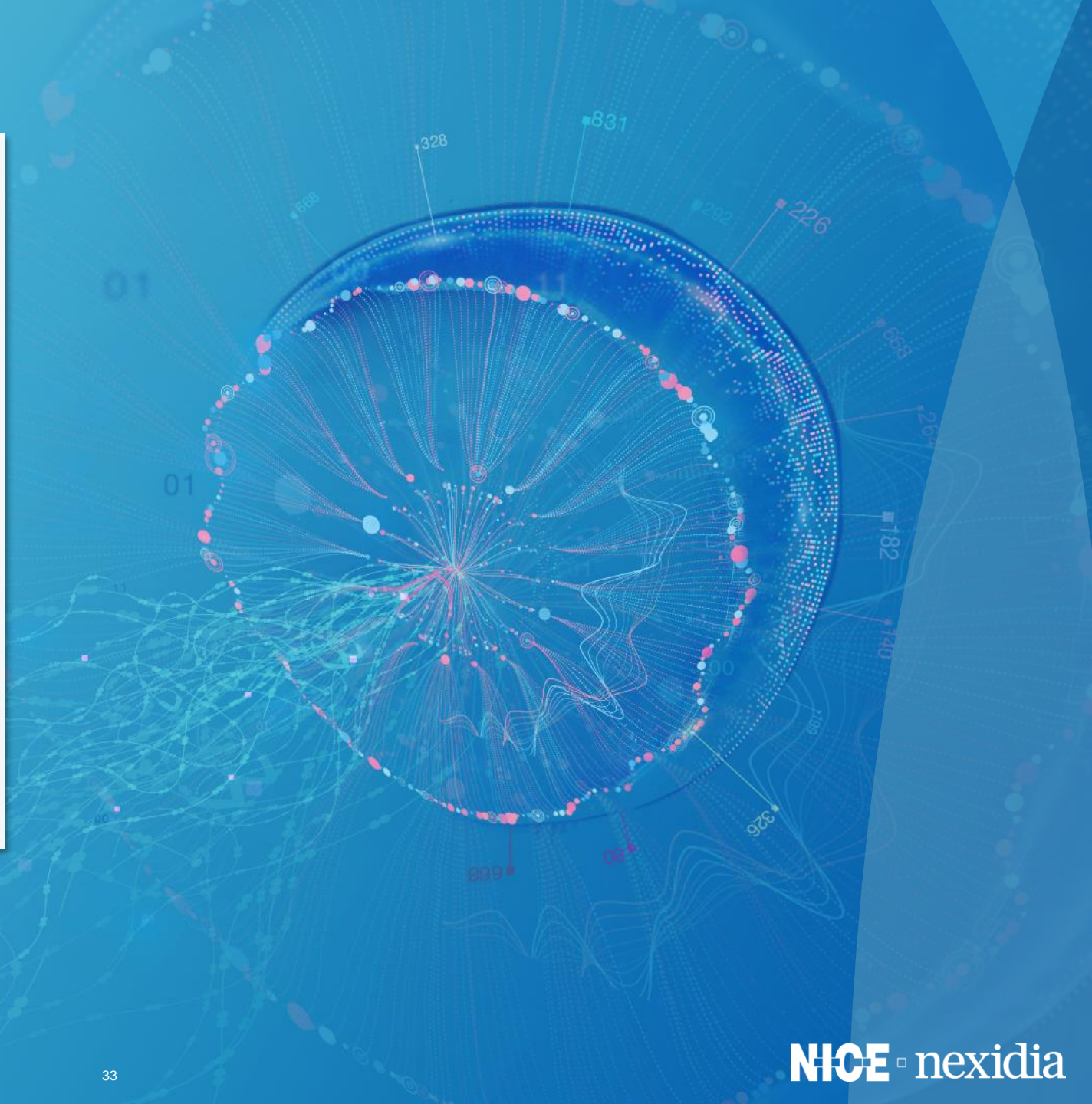
IN 2016

89%

OF COMPANIES
COMPETED MOSTLY
ON THE BASIS OF

**CUSTOMER
EXPERIENCE**

GARTNER



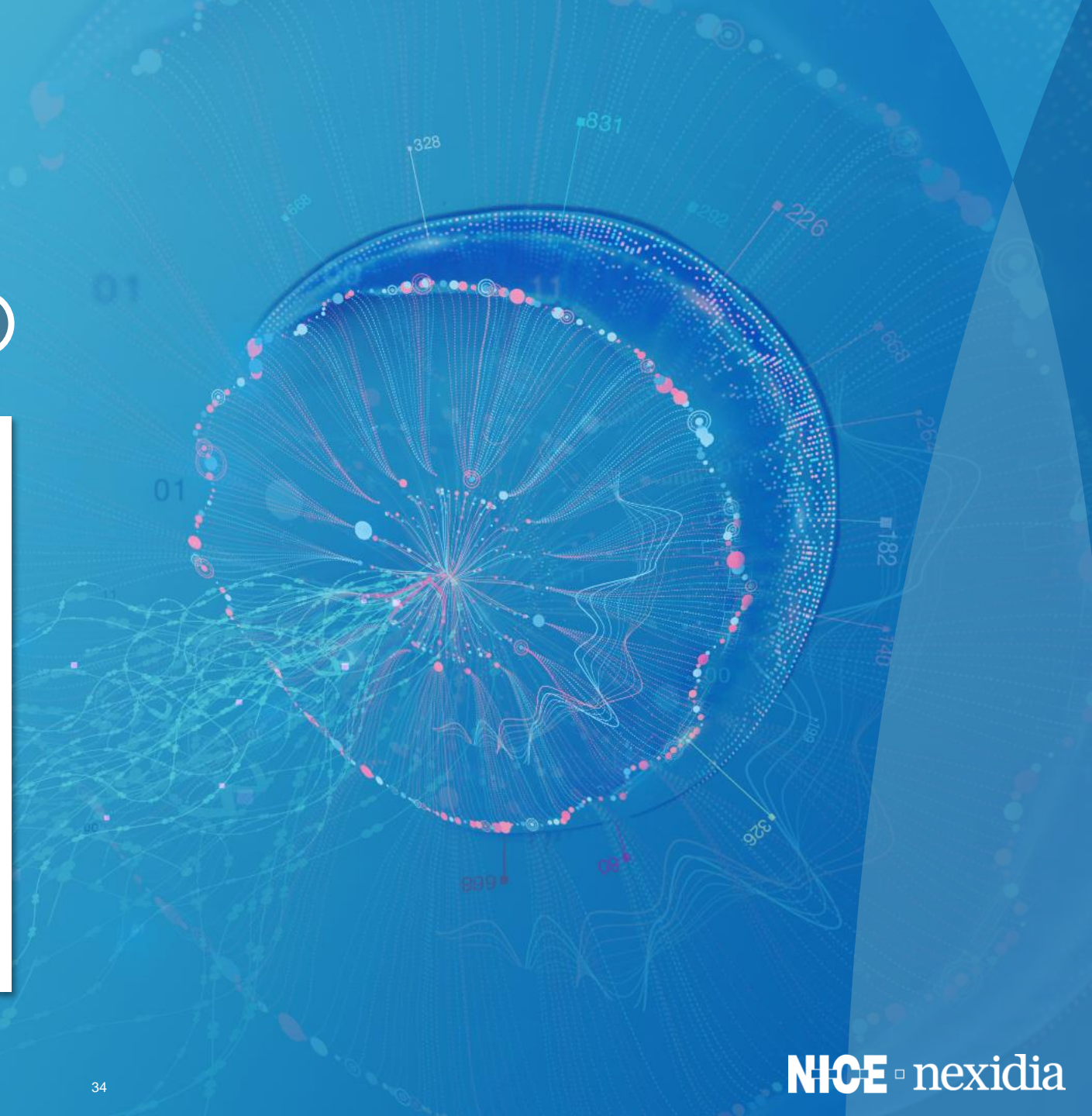
GROWING INTERACTION COMPLEXITY



6+

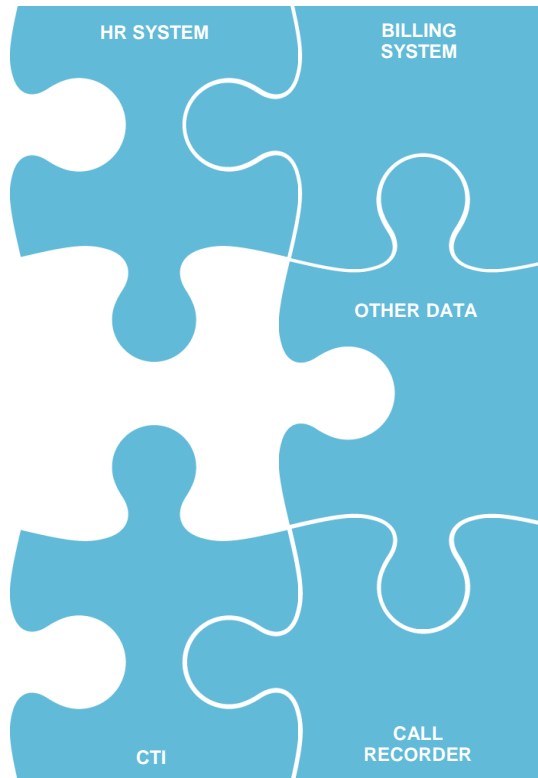
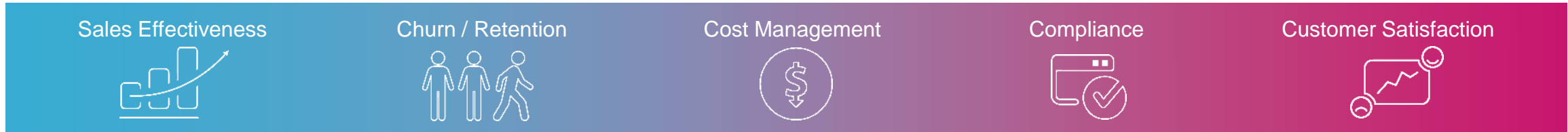
Interaction
channels

NICE Global Consumer Survey



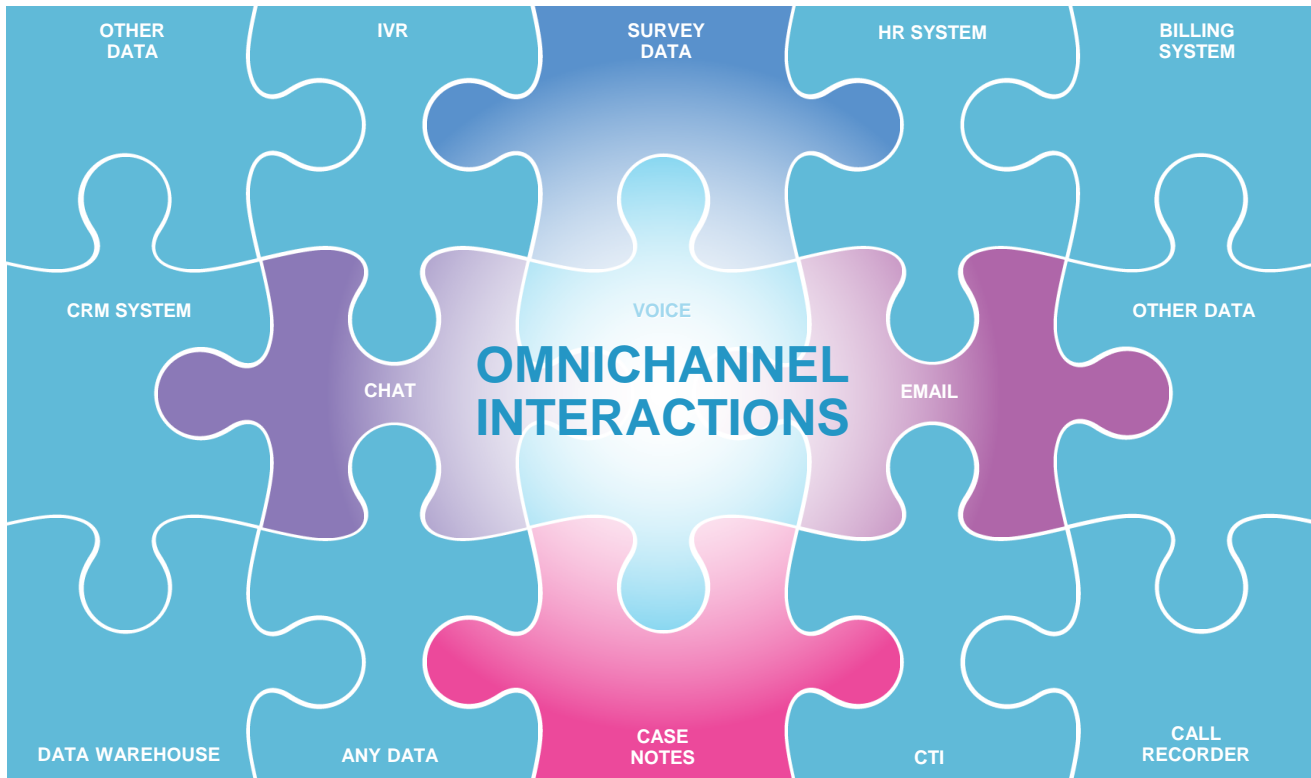
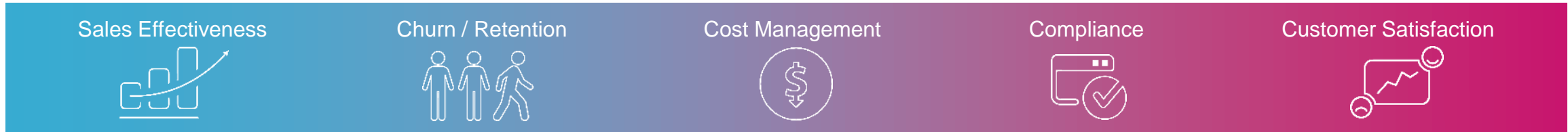
THE MISSING INSIGHT: INTERACTION ANALYTICS

Key business challenges to solve



THE MISSING INSIGHT: INTERACTION ANALYTICS

Key business challenges to solve



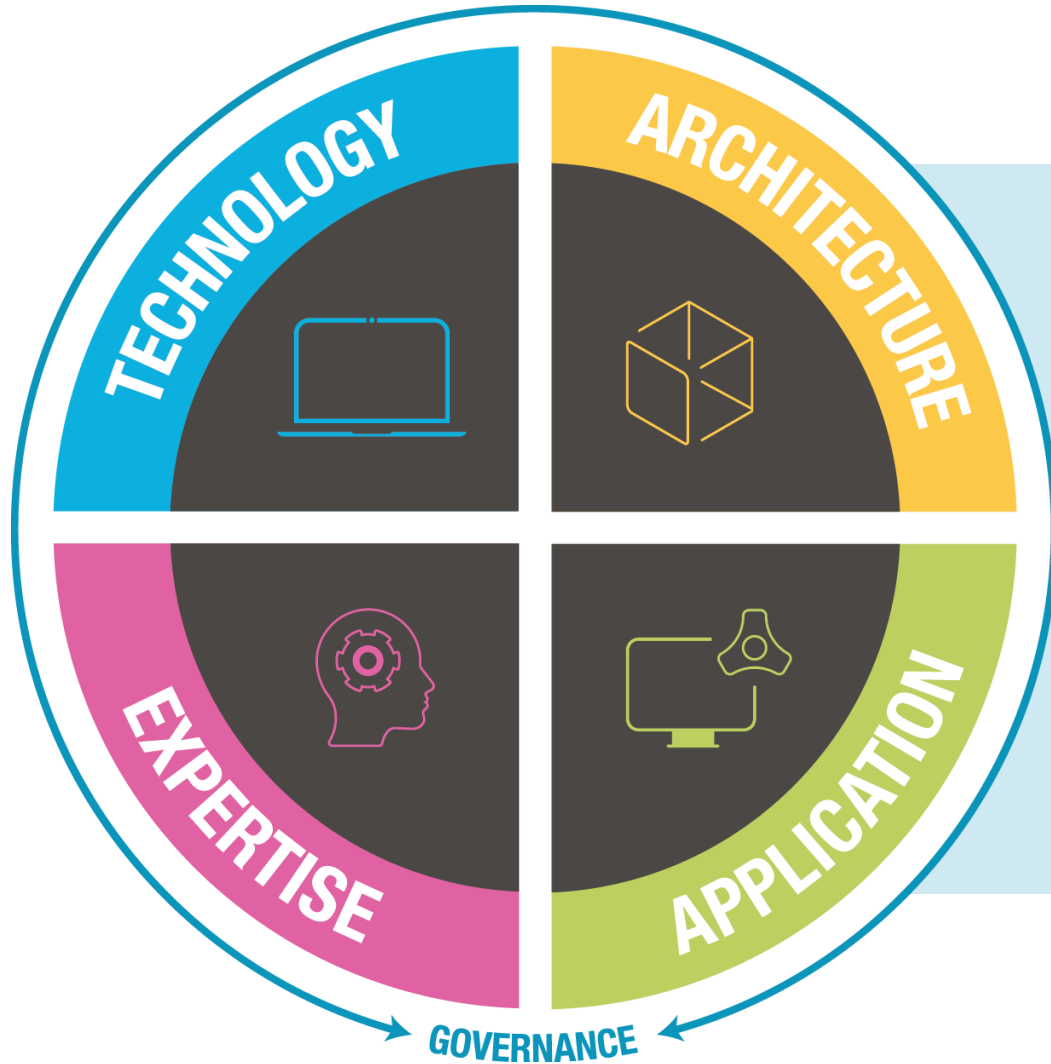
UNLOCKING RAW DATA

- Agent Behaviors
- Customer Behaviors
- Customer Intent
- Customer Discontent
- Retention Offers
- Competitor Mentions
- Tech Problem
- Statements
- Troubleshooting Techniques
- Evidence of Issue Resolution
- Questions Regarding Fees
- Customer Confusion
- Customer Frustration

ANALYSIS USE CASES

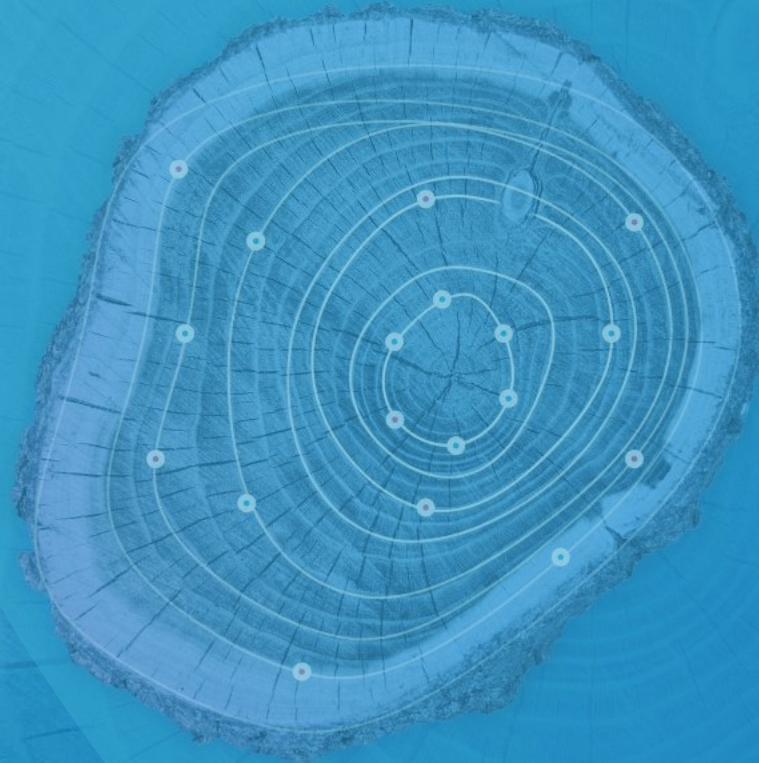
- Customer Effort
- Churn Prevention
- Customer Satisfaction
- Broken Journey
- Customer Intent
- Self-Service
- Cost to Serve
- First Contact Resolution
- Business Process Optimization

THE SUCCESSFUL ANALYTICS PROGRAM



Business outcomes that can be operationalized to positively affect the organization

THE SHORT TERM PLAN OF ACTION



PUT THE COST REDUCTION PROCESS IN MOTION



PUT THE COST REDUCTION PROCESS IN MOTION

 Reduce Contact
Handle Time



Agent Behavior/
Troubleshooting



PUT THE COST REDUCTION PROCESS IN MOTION



Reduce Contact
Handle Time



Reduce
Contact Volume



IVR
Optimization



Agent Behavior/
Troubleshooting



PUT THE COST REDUCTION PROCESS IN MOTION



Reduce Contact Handle Time



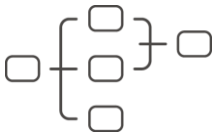
Reduce Contact Volume



Identify Broken Processes



Business Process Improvements



IVR Optimization



Agent Behavior/Troubleshooting



PUT THE COST REDUCTION PROCESS IN MOTION

 Reduce Contact Handle Time

 Reduce Contact Volume

 Identify Broken Processes

First Contact Resolution 

Business Process Improvements 

IVR Optimization 

Agent Behavior/Troubleshooting 



PUT THE COST REDUCTION PROCESS IN MOTION **IMPROVED PERFORMANCE**



Reduce Contact Handle Time



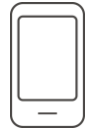
Reduce Contact Volume



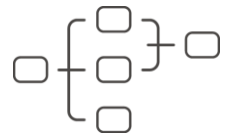
Identify Broken Processes



IMPROVED PERFORMANCE



First Contact Resolution



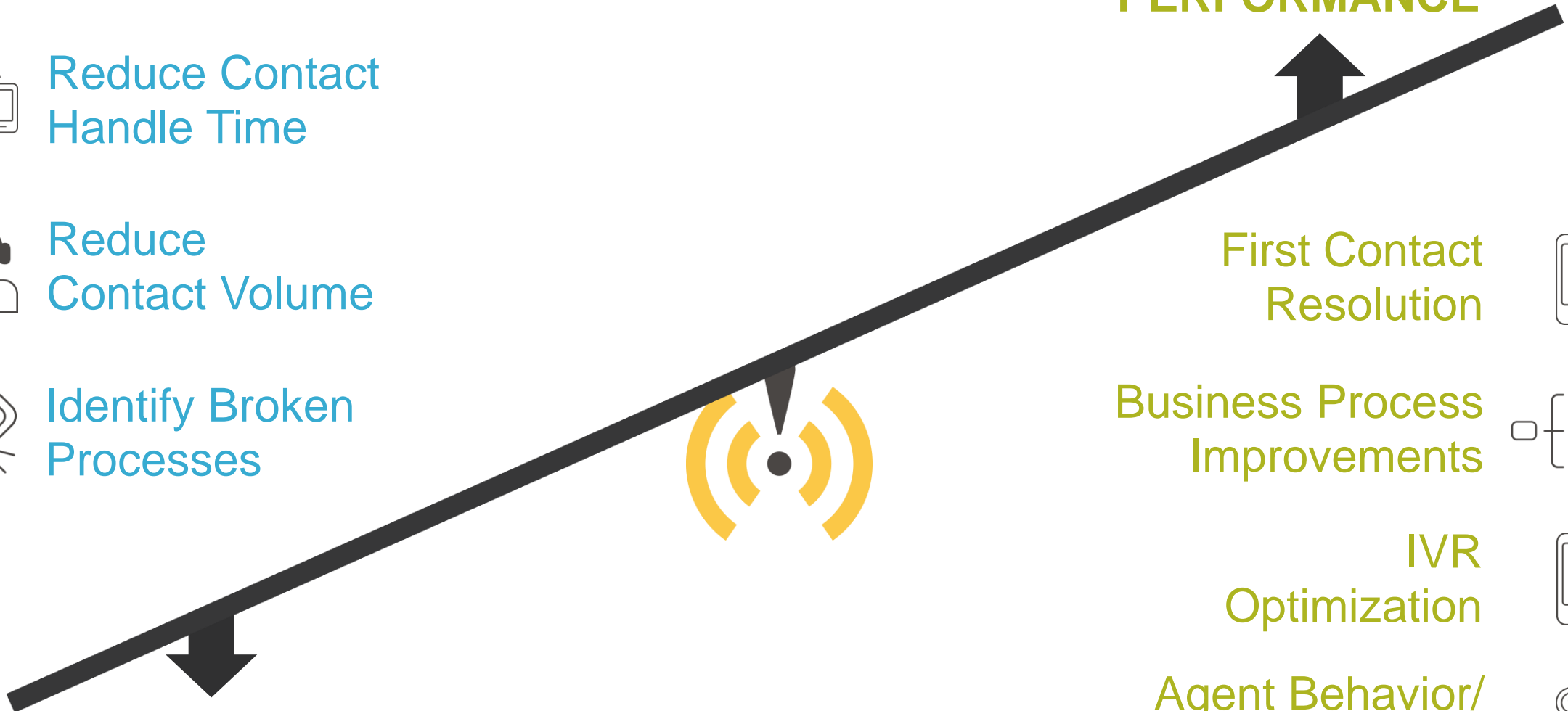
Business Process Improvements



IVR Optimization

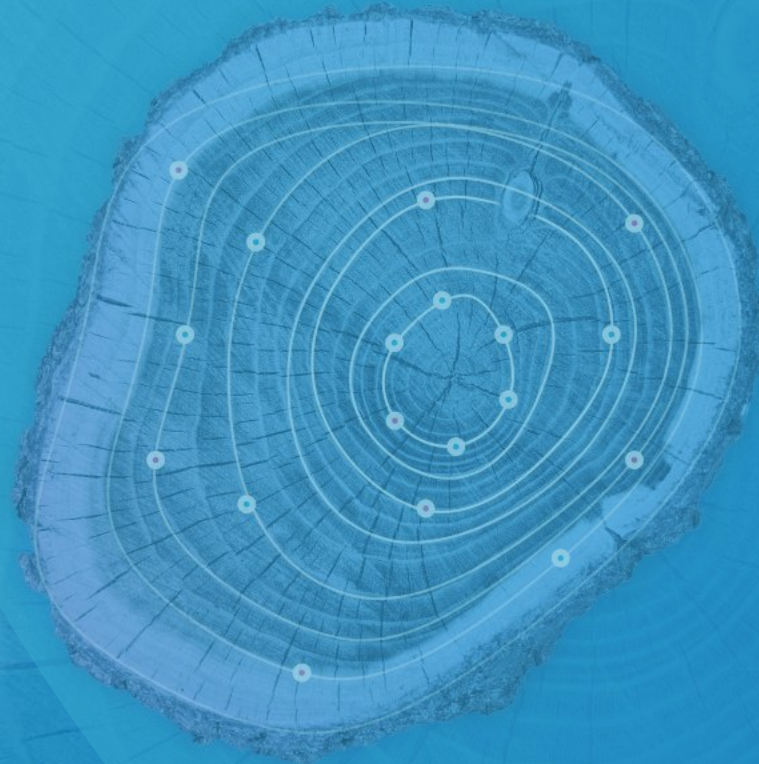


Agent Behavior/
Troubleshooting



LOWER COSTS

THE LONGER TERM JOURNEY



CUSTOMER ENGAGEMENT ANALYTICS

INTERACTION ANALYTICS: UNSTRUCTURED DATA

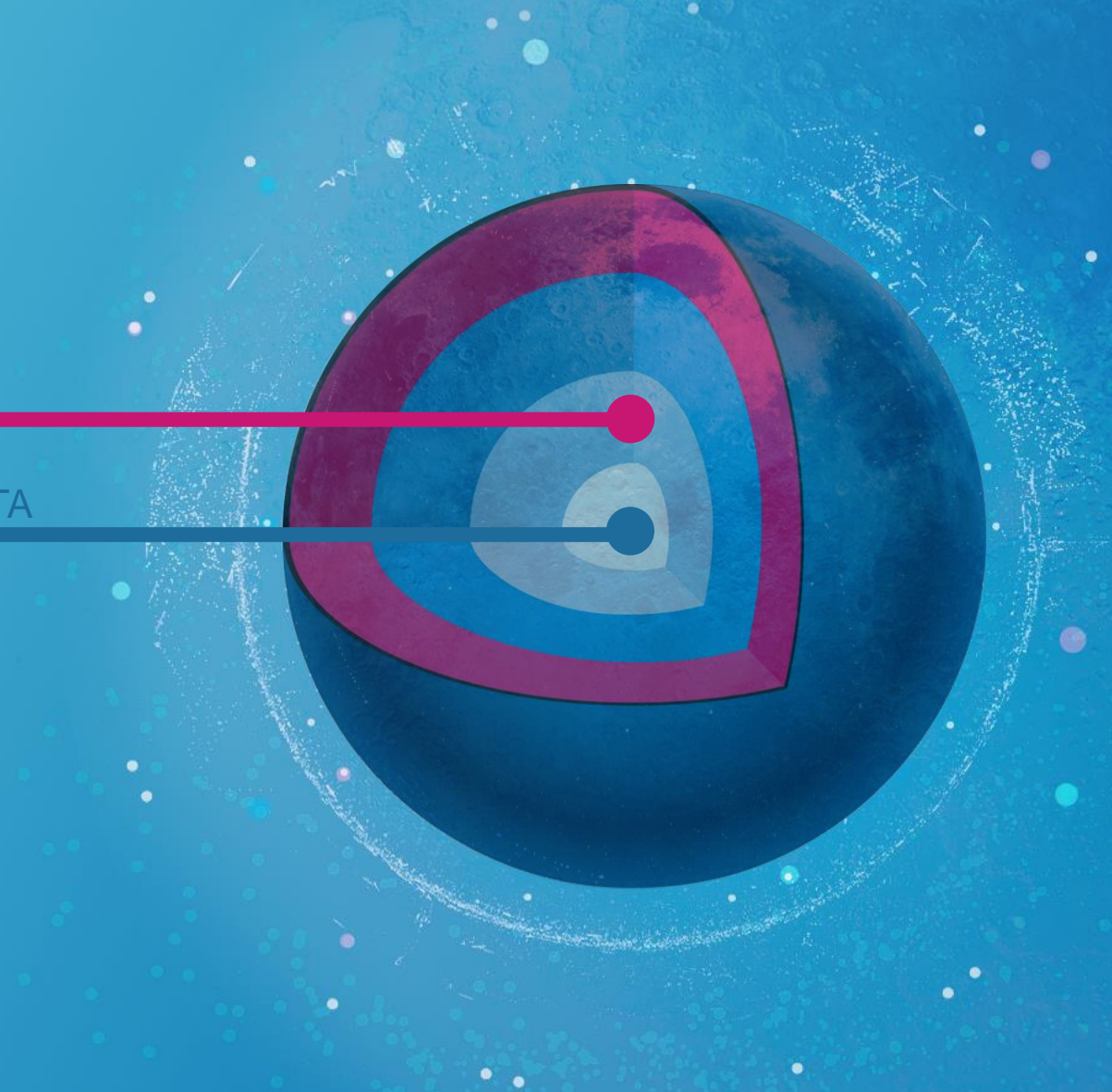


INTERACTIONS
UNSTRUCTURED DATA

CUSTOMER ENGAGEMENT ANALYTICS

IVR OPTIMIZATION

INTERACTION ANALYTICS: UNSTRUCTURED DATA

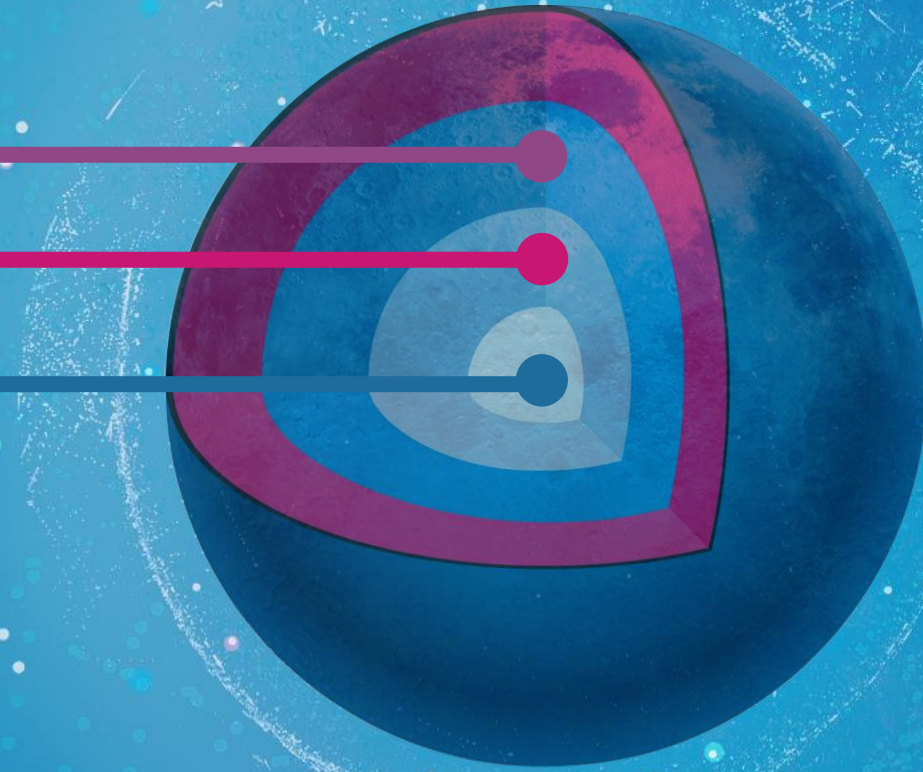


CUSTOMER ENGAGEMENT ANALYTICS

DIGITAL CONTAINMENT

IVR OPTIMIZATION

INTERACTION ANALYTICS: UNSTRUCTURED DATA



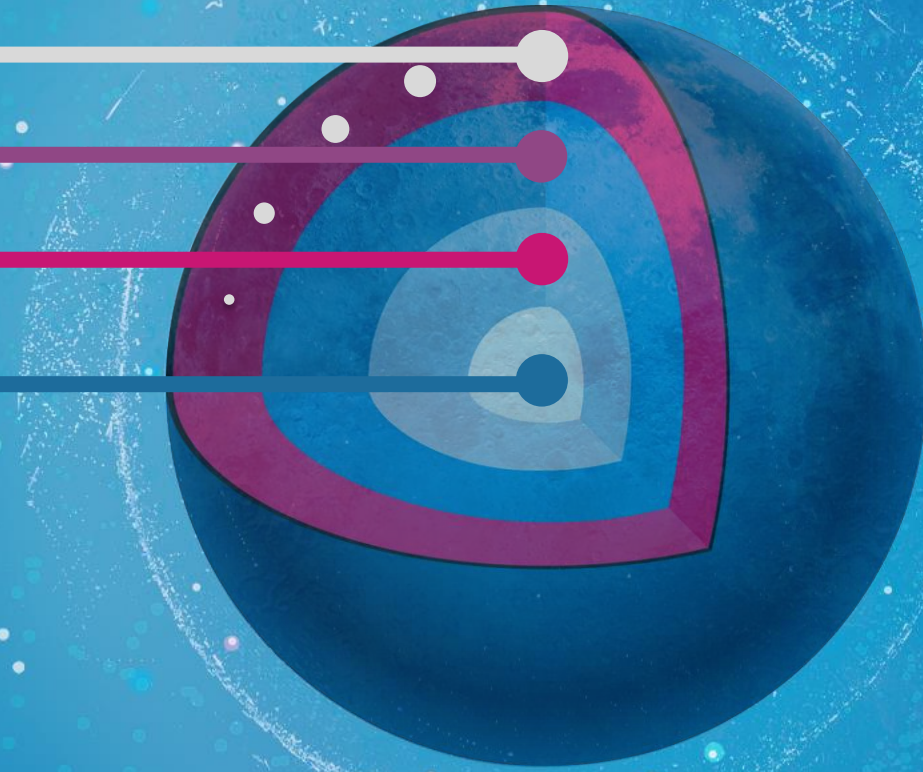
CUSTOMER ENGAGEMENT ANALYTICS

CUSTOMER JOURNEY OPTIMIZATION

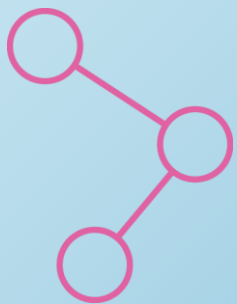
DIGITAL CONTAINMENT

IVR OPTIMIZATION

INTERACTION ANALYTICS: UNSTRUCTURED DATA



make analytics YOUR nature



TECHNOLOGY

+



APPLICATIONS

+



MANAGED ANALYTICS
SERVICES

+



CLOUD

Thank You

www.nice.com/analytics

Brian LaRoche, Director, Account
Based Marketing, CallMiner

<http://www.callminer.com>



Abby Monaco, Senior Marketing
Manager, NICE Nexidia

<http://www.nexia.com>



Mary Moilanen, Business
Intelligence Consultant, Calabrio

<http://www.Calabrio.com>



Q&A

MARCH 2018