Create Superstar Reps and Improve Agent Engagement

How Creditors Bureau USA Boosts Win Rates and Agent Experience with Real-Time Guidance

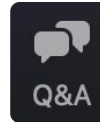Creditors Bureau USA

Balto

Welcome to Today's Webinar!

Stephen McDonnell
Customer Success Manager @ Balto
Webinar host/moderator

Today's session will be about **30 minutes** with time for **Q&A**.

Use the **Q&A button** on your screen to submit questions.

All registrants will receive the **video recording** and **slides** following the broadcast.

Balto

Welcome, Kasey!

Kasey Ismail
Collections Team Lead
Creditors Bureau USA

Creditors Bureau USA

- Retail and commercial collection agency
- Healthcare focus
- Established in 1935
- 3rd generation family-owned
- 27 agents (collectors)
- Hybrid team working in-office and remote
- Kasey has been with company for over 5 years
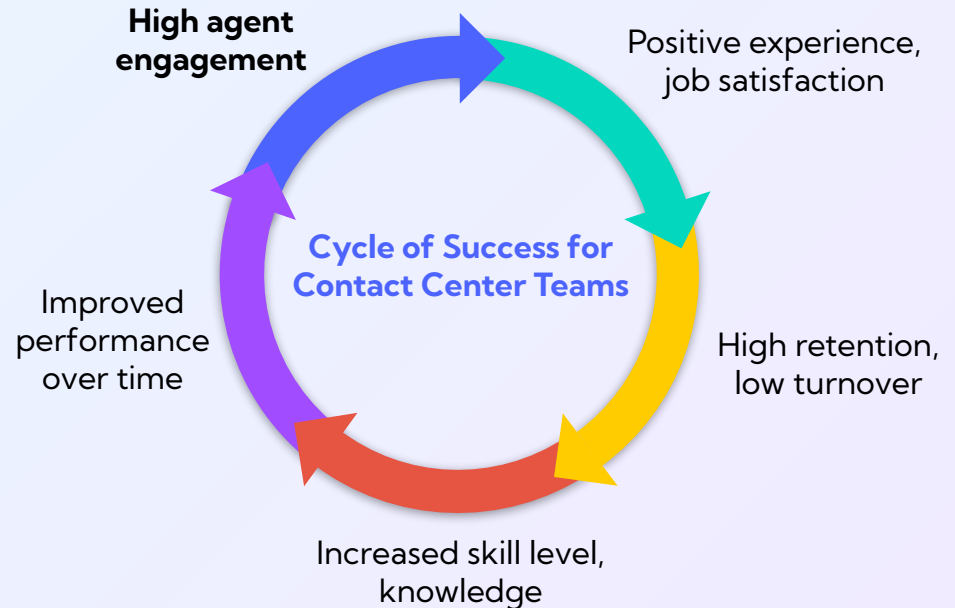- **Began using Balto's Real-Time Guidance in 2019**

Balto

What is agent engagement in contact centers?

Balto

Elements of Agent Engagement

What is agent engagement?

- Active **interest**, **involvement**, **enthusiasm**, **motivation**, and **commitment** to daily work

- High level of **connection** with the organization and **active participation** in team success

Improving one element leads to improvement in others →

High agent engagement

Positive experience, job satisfaction

Cycle of Success for Contact Center Teams

High retention, low turnover

Increased skill level, knowledge

Improved performance over time

Balto

Why focus on agent engagement?

Engaged and satisfied contact center employees are...

- **8.5x** more likely to stay than leave within a year
- **4x** more likely to stay than their dissatisfied colleagues
- **16x** more likely to refer friends to their company
- **3.3x** more likely to feel extremely empowered to resolve customer issues

New agent hires cost an estimated **$10,000 to $20,000** in training, direct recruiting costs, and lost productivity during ramp up.

In addition to pay, agents listed **promotions**, **community**, **stress level**, and **mission** as top reasons to stay or leave current job.

Source: *Boosting contact-center performance through employee engagement*, Whitney Gretz and Raelyn Jacobson, McKinsey & Company

Balto

Customer Story: Creditors Bureau USA

Previous Challenges Before Using Balto

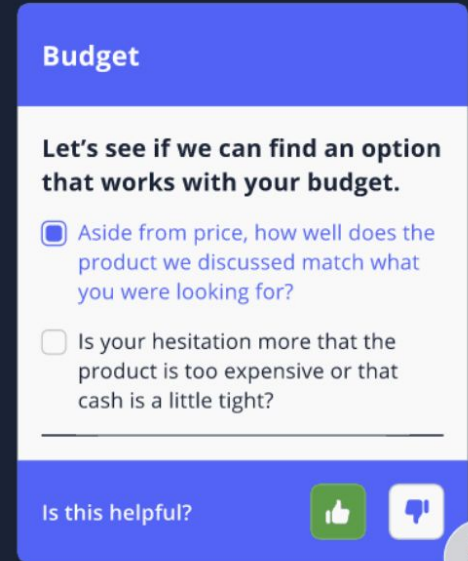**Before using Balto, what challenges did CB USA experience?**

- Relied on disorganized, static call scripts on paper
- Necessary to memorize call flows, responses, rebuttals, questions
- Had to manually track and remember if something had been said or not
- Frustration, lack of confidence on calls, long ramp times
- Call flows, performance, and compliance adherence were inconsistent

Balto

Solution: Balto's Real–Time Guidance

How does Balto guide and support agents?

- Conversational AI automatically listens to both sides of call audio, guides agents' call flow, and checks off completed checklist items in real time

- Dynamic prompts show agents the most effective responses in critical moments when callers ask questions, have concerns, or share important information

Results: Creditors Bureau USA + Balto

How does Balto help support your agents?

*"Balto exceeds expectations and helps me get through calls faster instead of using a paper script and looking for the right things to say. Whoever built this amazing program put time and thought into how it will work. **I enjoy having the little dog app – he's a good pet!**"*

*"Balto provides a wonderful tool to help us stay focused on the call and gives us information on how to handle accounts. What else I like about it is that it goes through an important list and details what we are supposed to say. **I wish we had this years ago.**"*

Balto

Results: Creditors Bureau USA + Balto

How has your team achieve high agent engagement?

1. Agents are **actively involved** in improving, refining, and optimizing Balto playbooks.

2. Balto guides conversations in real-time to ensure near-perfect compliance and **scale highest-performing call content** to every agent across the entire team.

3. **Established team goals and target KPIs** are related to implementing best practices enabled by using Balto's smart checklists and dynamic playbook items.

4. Reporting in Balto enables Kasey to easily **identify and recognize top-performing team members** and share regular "Superstar Shoutouts" with the team.

Balto

Tips to Improve Agent Engagement + Performance

Balto

1. Involve agents in improving, optimizing call content

Why it works:

- Agents often have great perspectives/experience – they know what works
- Asking for (and implementing) agent input and feedback creates a powerful sense of ownership, shows that they are valued, and improves team buy-in
- Creates a powerful, positive feedback loop for making continuous improvement

Tips and ideas:

- Source best practices, rebuttals, qualifying questions, etc. from your agents
- Ask agents what call flows, questions, and responses have been most successful
- Measure results quantitatively to confirm and expand upon agents' direct experience

Balto

2. Scale high performance, best practices to entire team

Why it works:

- What consistently works for one agent will help others in a similar setting be successful
- It feels great to be successful and achieve high performance, increasing job satisfaction
- Shared success is a win-win: boosts agent/team morale AND the bottom line

Tips and ideas:

- Once agents help to identify what works best, enable your entire team to conveniently utilize those winning strategies to improve individual performance
- Give high-performing agents opportunities to coach, teach, and share with each other
- Help new agents experience early success and shorter ramp times by empowering them to easily implement high-performing call content right from the start

Balto

3. Identify, recognize, and reward high performers

Why it works:

- Public recognition of a job well done is a powerful motivator
- Recognition is frequently listed as a top thing employees want most in their jobs
- 82% of employees say they are happier when they're recognized at work

Tips and ideas:

- Establish clear, consistent, meaningful, and actionable KPIs to measure
- Use leaderboards and/or gamification to show progress and performance
- Find opportunities to recognize other positive results, not just raw performance
  - Improvement over time
  - Milestones, first solo calls, first wins for new agents
  - Contributions to shared team processes, culture, or community

Balto

4. Provide necessary support, resources, and tools

Why it works:

- Easy-to-reference guidance and resources are better than relying on memorization
- Feeling prepared and supported on calls helps significantly reduce stress and anxiety and greatly improves job satisfaction, positive agent experience, and performance

Tips and ideas:

- Use peer-to-peer coaching to pair top-quartile performer with a lower performer – increasing performance and instilling a sense of community
- Instead of rigid, static call scripts, use real-time guidance tools, like Balto, to dynamically guide agents' conversations

Balto

How can Balto help your team?

Close Revenue All Day

Empower agents to convert, save, and retain sales opps live on the call.

Delight Customers

Communicate with customers in ways they love, consistently, on every call.

Ensure Perfect Quality

Get record-breaking quality scores and real-time visibility for 100% of calls.

Bulletproof Compliance

Adhere to federal, state, and company guidelines on every single call.

Next: Q&A →

Stop Scoring Calls
And Start Improving Them

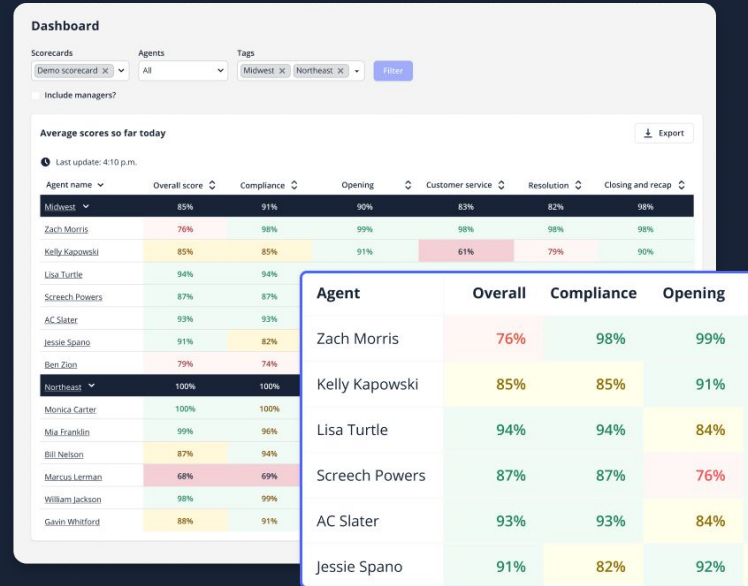**Start automatically scoring 100% of calls with a few clicks.**
Build custom scorecards for the specific criteria that matter to your team instead of weeding through crowded spreadsheets.

Quickly identify the root cause of low scores.
Examine individual calls that caused low scores more closely and use targeted coaching to improve call quality.

Get a complete picture of call quality.
Correct issues before they become habits, and scale good behaviors to all your agents.

Dashboard

Scorecards: Demo scorecard
Agents: All
Tags: Midwest, Northeast
Filter
☐ Include managers?

Average scores so far today   ⬇ Export

🕐 Last update: 4:10 p.m.

Agent name	Overall score	Compliance	Opening	Customer service	Resolution	Closing and recap
Midwest	85%	91%	90%	83%	82%	98%
Zach Morris	76%	98%	99%	98%	98%	98%
Kelly Kapowski	85%	85%	91%	61%	79%	90%
Lisa Turtle	94%	94%				
Screech Powers	87%	87%				
AC Slater	93%	93%				
Jessie Spano	91%	82%				
Ben Zion	79%	74%				
Northeast	100%	100%				
Monica Carter	100%	100%				
Mia Franklin	99%	96%				
Bill Nelson	87%	94%				
Marcus Lerman	68%	69%				
William Jackson	98%	99%				
Gavin Whitford	88%	91%				

Agent	Overall	Compliance	Opening
Zach Morris	76%	98%	99%
Kelly Kapowski	85%	85%	91%
Lisa Turtle	94%	94%	84%
Screech Powers	87%	87%	76%
AC Slater	93%	93%	84%
Jessie Spano	91%	82%	92%

Next: Q&A →
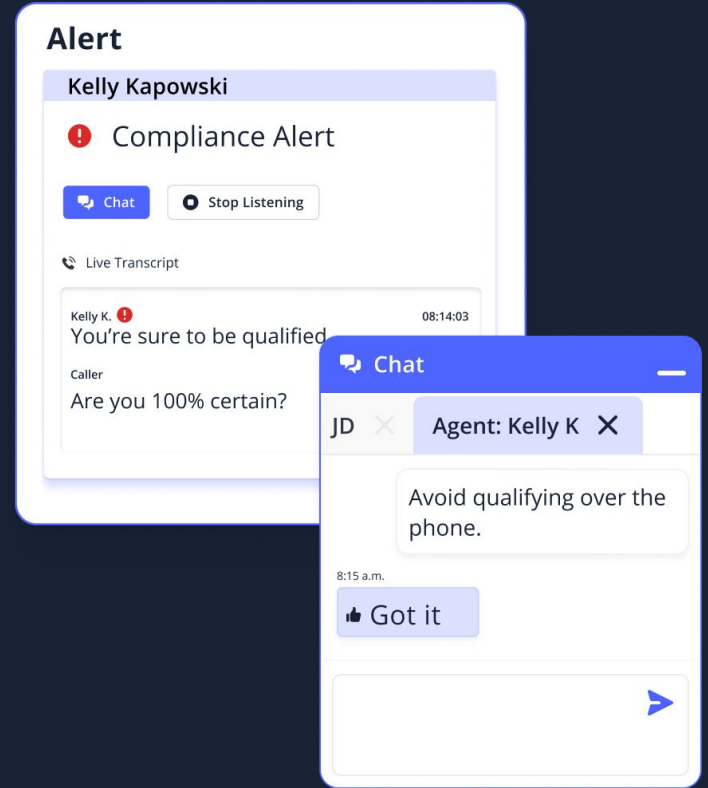
Real-Time Coaching

Never Miss Another Coachable Moment

Create alerts for key moments on calls.
Balto listens to calls and instantly alerts a manager when an agent needs coaching.

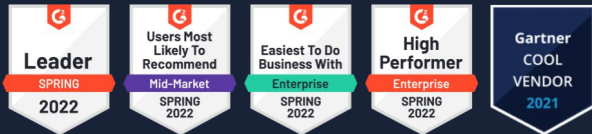**Listen in and coach agents through tough calls.**
Send backup for calls at risk, proactively guide critical moments of a conversation, or congratulate agents for a job well done.

Alert

Kelly Kapowski

⚠️ Compliance Alert

💬 Chat   ⦿ Stop Listening

📞 Live Transcript

Kelly K. ⚠️   08:14:03
You're sure to be qualified

Caller
Are you 100% certain?

💬 Chat   —

JD ✕   Agent: Kelly K ✕

Avoid qualifying over the phone.

8:15 a.m.
👍 Got it

Next: Q&A →

Agents Love Balto!

**200+ 5-star reviews on G2
Overall rating: 4.7 stars**

★★★★★
"Love love love Balto... It is user friendly and makes my job seamless."
Sales rep, Enterprise 1,000+ employees

★★★★★
"This is my first experience using Balto, and I LOVE IT!"
CSM, Enterprise 1,000+ employees

★★★★★
"What a friend I have in Balto! The functionality is excellent! Love it!"
Sales rep, Mid-market 51-1,000 employees

★★★★★
"Balto rocks! Balto is truly engaged in what's happening on the calls!"
Insurance sales rep, Enterprise 1,000+ employees

★★★★★
"I love the way Balto keeps me on my talking points!!"
Account executive, Mid-market 51-1,000 employees

Leader
SPRING
2022
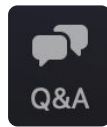
Users Most
Likely To
Recommend
Mid-Market
SPRING
2022

Easiest To Do
Business With
Enterprise
SPRING
2022

High
Performer
Enterprise
SPRING
2022

Gartner
COOL
VENDOR
2021

Balto

Balto

Schedule a Demo

Click the link in the chat to schedule a demo!

Or visit: www.balto.ai/get-demo

Next: Q&A →

Thank you!
Q&A

Use the **Q&A button** on your screen to submit questions.

All registrants will receive the **video recording** and **slides** following the broadcast.

For more information and to schedule a demo, visit **balto.ai**

Balto