How eHealth Improved Agent Performance Using Real-Time Coaching

Tuesday, October 18, 2022

Welcome to today's webinar! We will begin shortly.

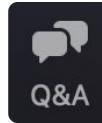Balto

Welcome to Today's Webinar!

Kevin Wallis
Director of Customer Enablement @ Balto
Webinar Host/Moderator

Today's session will be about **45 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.

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Today's Guest Speaker

Barbara Flovin
Associate Sales Operations Manager @ eHealth

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Agenda

- Methods for Coaching Agents
- How eHealth is using Real-time Coaching, Alerts, and Chat
- Discuss the impact these features have had at eHealth
- Q&A with Barbara
- Product Demo
- Final Questions

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Methods for Coaching Agents

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Previously: Post Call Method

Delayed: Coaching sessions typically occur the next day. Often agents would not remember the calls.

Time-consuming: Supervisor would need to download and listen to multiple calls to locate behavior to coach. Then bookmark the recording to play in the one-on-one session with the agent.

Ineffective: Supervisors spent more time listening to calls within their daily playbook, overtaking actual coaching time and administrative duties.

Remote Work: There is no way to "walk the floor" in our new remote work world.
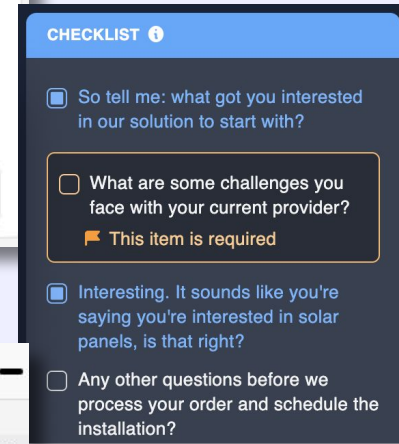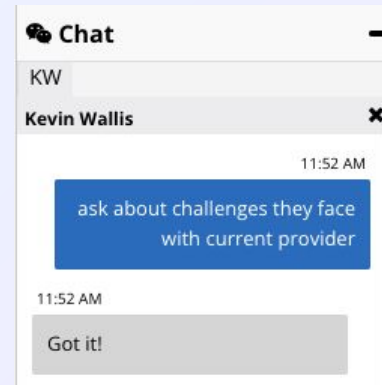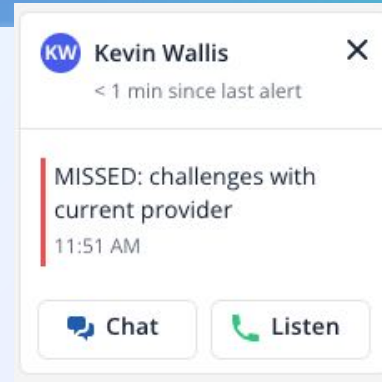
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Now: Real–Time Coaching Method

Alerts: Personalized alerts at the individual agent level or group of agents that identify both positive and negative agent behaviors when the agent is live on the call.

Coaching: Provide guidance to an agent via built-in chat or join a live call for both positive and negative behaviors in the moment.

Post Call: Pinpoint performance distractors using empirical data reports, allowing you to show, not tell.

Performance: Improve compliance and conversion by giving supervisors visibility into agent behaviors and helping them mentor agents in the moment

KW **Kevin Wallis** ✕
< 1 min since last alert

MISSED: challenges with current provider
11:51 AM

💬 Chat   📞 Listen

CHECKLIST ⓘ

☑ So tell me: what got you interested in our solution to start with?

☐ What are some challenges you face with your current provider?
🚩 This item is required

☑ Interesting. It sounds like you're saying you're interested in solar panels, is that right?

☐ Any other questions before we process your order and schedule the installation?

🐾 **Chat** —

KW

Kevin Wallis ✕

11:52 AM

ask about challenges they face with current provider

11:52 AM

Got it!

Balto 🐾

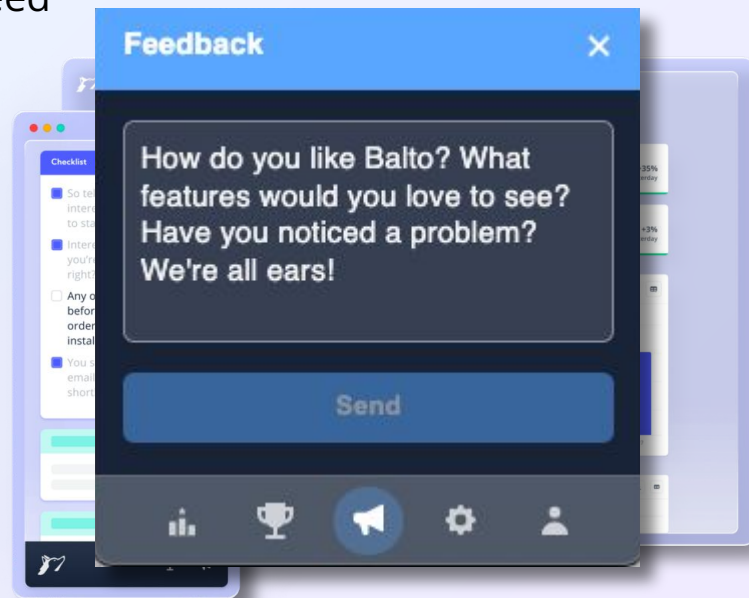# How eHealth is Using Real-Time Coaching

Setting the Stage

- **Culture of Balto**
  - Everyone uses Balto
    - New agents - Balto will help you get up to speed faster!
    - Tenured agents - Balto listens for your great habits - we need you!!!
  - Front of mind at all times
    - Leadership check-ins
    - Agent check-ins (morning, after lunch)

- **Feedback Floodgates**
  - Ask for feedback from all teammates
    - Are the resources helping?
    - What would you like to see?
    - Track all feedback
  - Be agile and willing to test out changes
  - Follow up!

Feedback

How do you like Balto? What features would you love to see? Have you noticed a problem? We're all ears!

Send

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Alerts for Supervisors and Agents – Two Way Visibility

Absence Alerts allow supervisors and agents to be alerted when a checklist item has not been said in a certain period of time.

eHealth examples: Cognitive Compliance, TCPA, MARX, and doctor information

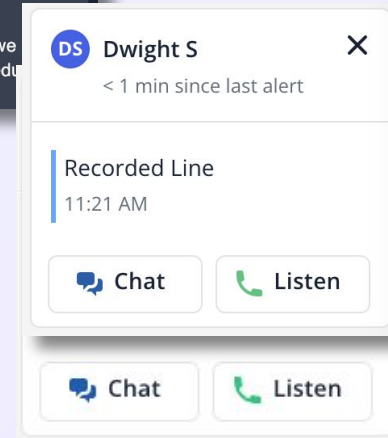**Occurrence Alerts** act similarly and signal when a playbook item occurs.

eHealth examples:
- Introduction - "Is there anyone else in the household that has Medicare?"
- Active Language - "Qualify"
- Needs - Biggest Concern "What's your biggest concern about your healthcare?"

Agent sees:

CHECKLIST ⓘ

☑ Hello, this is [name] on a recorded line. Am I speaking with [consumer name]?

☐ So tell me: what got you interested in our solution to start with?

☐ What are some challenges you face with your current provider?

☐ Interesting. It sounds like you're saying you're interested in solar panels, is that right?

☐ Any other questions before we process your order and schedule installation?

Supervisor sees:

DS **Dwight S**   ✕
< 1 min since last alert

Recorded Line
11:21 AM

💬 Chat   📞 Listen

💬 Chat   📞 Listen

Real-Time Agent–Supervisor Chat

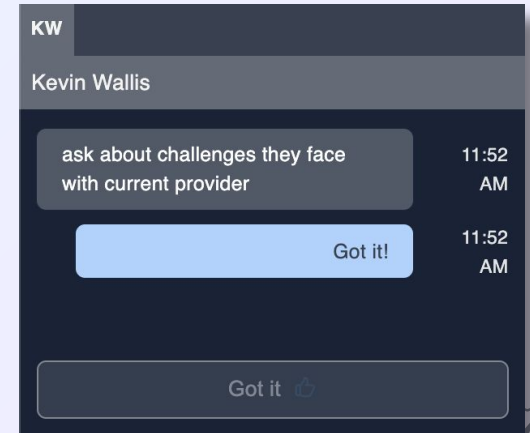**Chat** allows supervisors to interact with agents in real-time.

eHealth uses:
- View live agent-customer call transcript
- Chat with the agent in real-time based on alerts triggered
- Intervene in the call in case of non-compliance

Supervisor sees:

KW Kevin Wallis

< 1 min since last alert

MISSED: challenges with current provider

11:51 AM

💬 Chat   📞 Listen

🐾 Chat

KW

Kevin Wallis

11:52 AM

ask about challenges they face with current provider

11:52 AM

Got it!

Agent sees:

KW

Kevin Wallis

ask about challenges they face with current provider

11:52 AM

Got it!

11:52 AM

Got it 👍
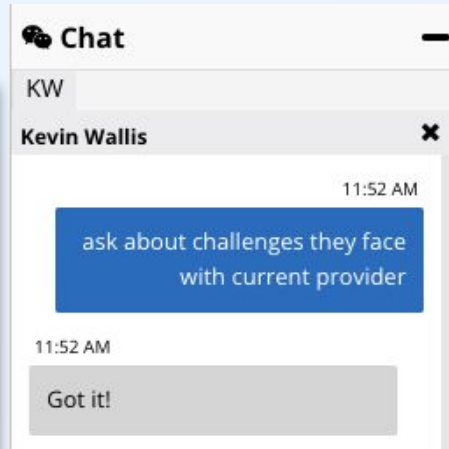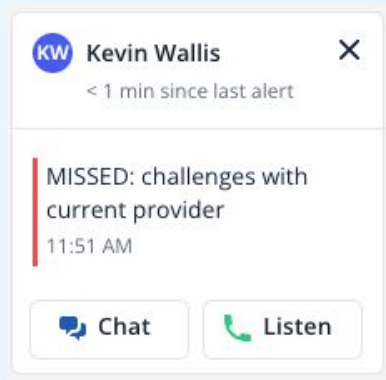
Monitor Agent Performance

Monitor agent performance over a period of time using data.

Overall Alert Trends
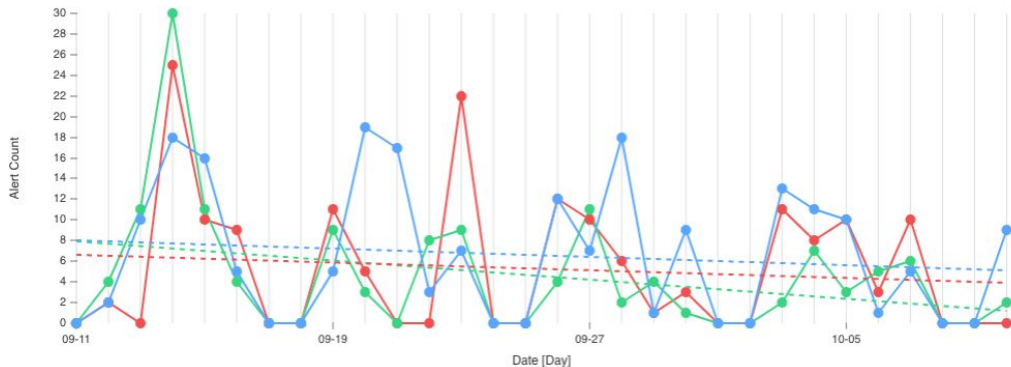
3 items

- ☐ Negative
- ☐ Positive
- ☐ Informative

Alert Occurrences

View Report

Top 5 ▼

Rank ⇅	Alert	Number of Alerts		Calls
#1	Sales Demo		42	25
#2	Win Marker		33	33
#3	Objection - Expensive		30	15
#4	Expensive Objection		23	14
#5	Competition		21	10

Chat Occurrences

Top 5 ▼

Rank ⇅	Supervisor	Number of Chats		Calls w/ Chats
#1	David Jameson		34	17
#2	Tyesen Larsen		14	13
#3	Taylor Hatfield		10	5
#4	Justin Sholly		8	4

eHealth Compliance Improvements Data

Cognitive Compliance Alert (10% improvement)

TCPA Alert (7.25% improvement)
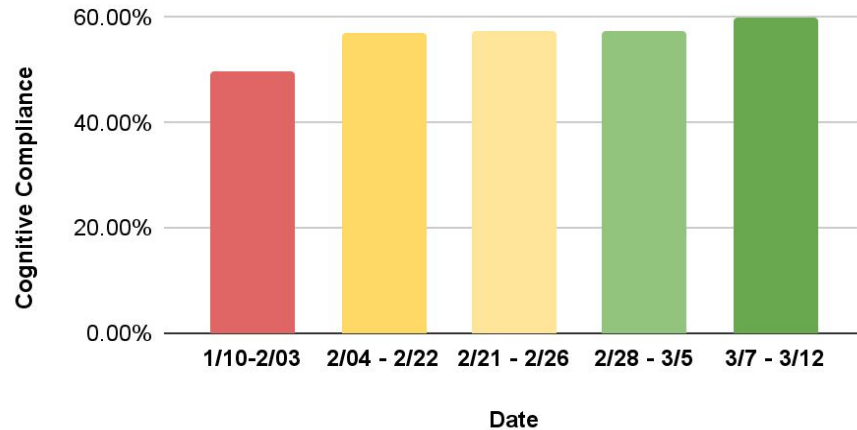
Does anyone help you make your healthcare decisions?
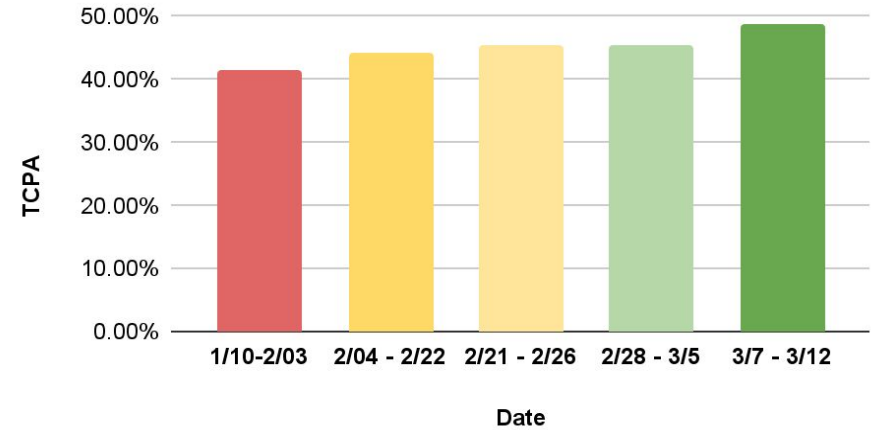
eHealth contacts you with updates, info, or promotions about your insurance options using an auto dialer or pre recorded voice, are you ok with that?

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Real Time Alerts – Best Practices

People: **Loop in leadership**
- Choose a cheerleader
- Set a communication cadence
- Track ideas

Purpose: **Set a goal for each alert**
- Data linked to the purpose
- When/who will use the alert
- Usage time frame

Progress: **Track alert progress**
- Alert usage data
- KPI Changes
- Did the alert achieve its goal?
  - Adjust or sunset

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> "One of the things I've heard is, "I want to get an alert. Come on, somebody do something good or mess up so I can get an alert."
>
> I've heard nothing but great positive feedback that it's worth the investment.

- *Jeremy S.*
  eHealth Manager

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"It's gonna be there to save you.

If you're in a situation where your manager or your supervisor is not available, and you're lost as to what to say, you have Balto there 24/7.

-    *eHealth Agent*

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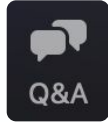
Use the **Q&A button** on your screen to submit questions.

Up next: Real-Time Coaching Demo

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Thank you, Barbara!

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Real-Time Alerts Demo

RTC Demo
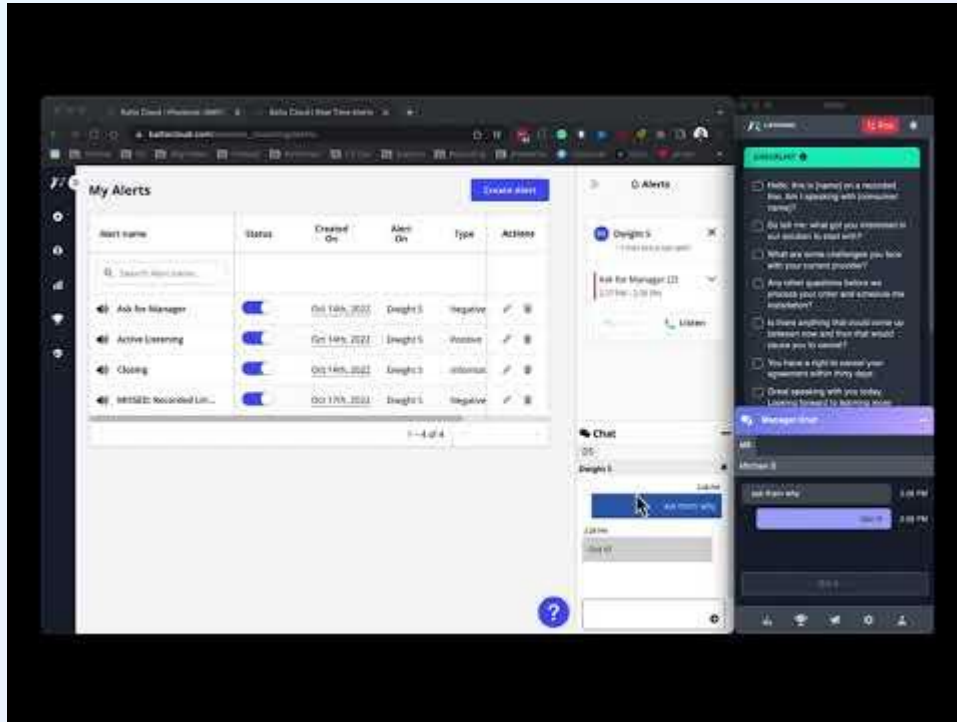
RTC Activity Log and Reporting

Date Range

10/11/2022 to 10/17/2022 | Filter

Listen Occurrences

View Report

Top 5

Rank	Supervisor	Number of Listens	Calls w/ Listens
#1	Michael Scott	19	31
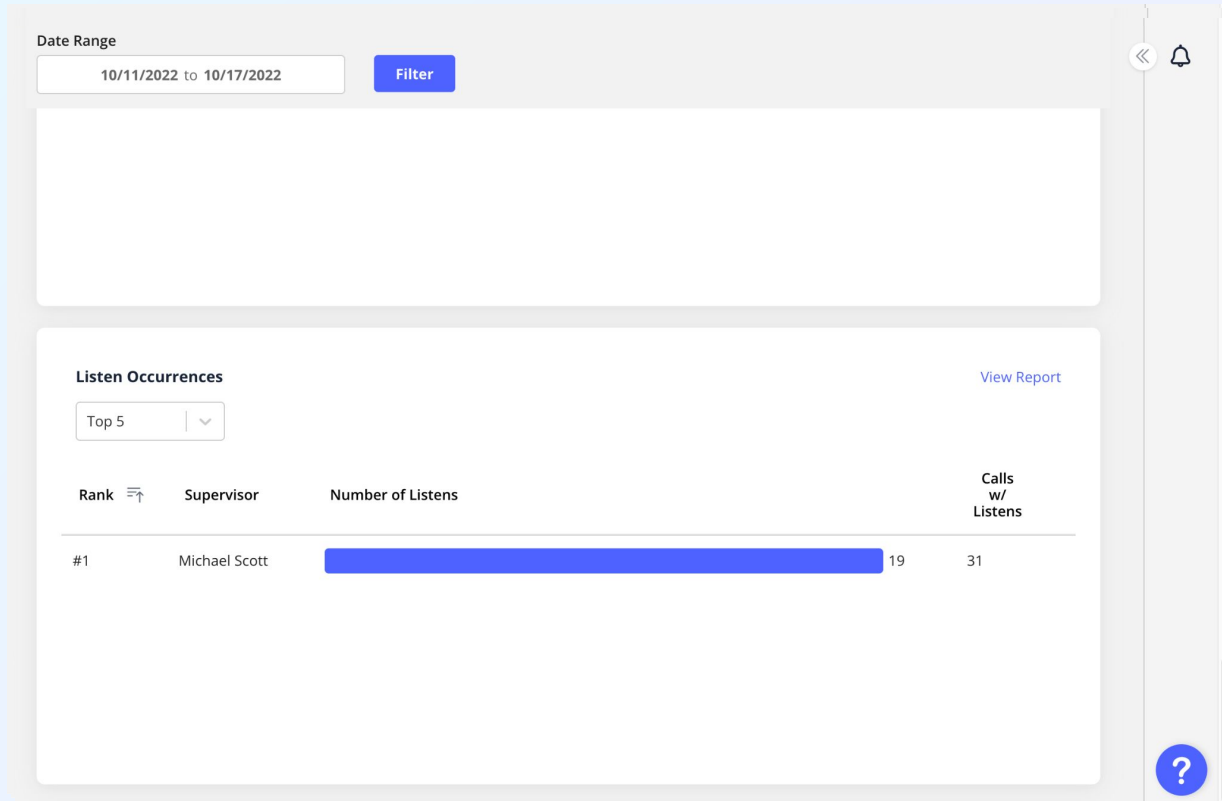
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Sneak Peek at Call Explorer

Sneak Peek at Call Explorer

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.

Select **"Yes, please contact me!"** on your screen now to schedule a personal demo of Balto's Real-Time Coaching.

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

Balto 🐾

Q&A

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

Q&A
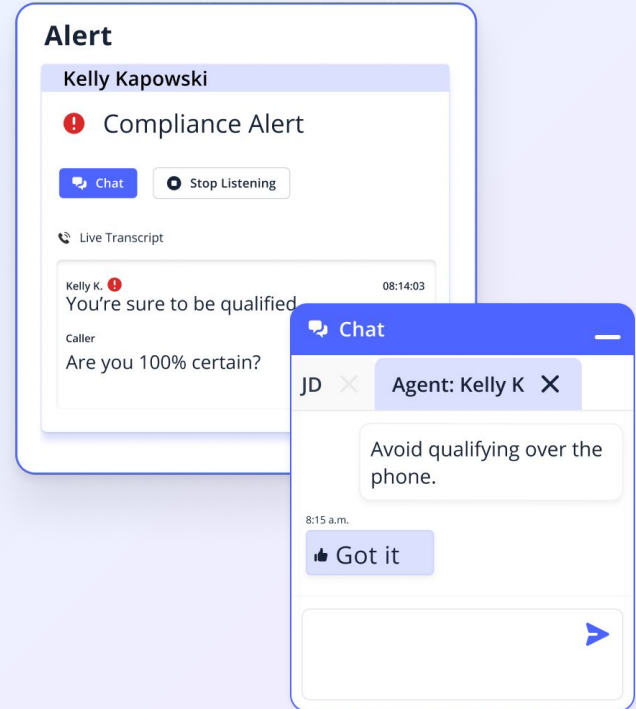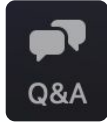
Thank you for joining us!

For more information, visit **balto.ai**

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How eHealth Improved Agent Performance Using Real–Time Coaching – Q&A

10/18/2022

Question	Answer
How do you feel the switch to remote would have gone without real-time coaching	Balto helps us emulate that in-office experience as much as we can as agents tend to get isolated when working at home. Balto helps us to connect with them in ways we could not.
Do you always have the alert panel open?	Set audio alerts. If you have the speaker on, you can hear those alerts. While the app is on and minimized, it will still be listening and alert the supervisor when one comes in. Balto is doing the listening for them.
Does Balto help add more time to your/supervisors' day?	Absolutely. We have supervisors come to us and say thank you for bringing Balto to us! The alerts are color-coded and called out specifically for you so you can go straight to that part of the call if you miss an alert.
How did you formulate the perfect playbook knowing every item is different?	What are the items that every agent wants to cover on a call? We then asked and got a lot of feedback from agents and supervisors. Through feedback and trial and error, we have built these deck lists that are so interactive to exactly what they need.
How many bullets is your playbook? Is yours designed to get through the first 5 minutes of the call or the entire call?	The checklist depends on the agent taking the call. Different playbooks for each division. Medicare is a little longer but is shortened during AEP for the checklist. But we do keep all decklist items. The checklist varies based on the season and the agent's needs.
Does the Balto rep ever intervene in a call between an agent and a consumer?	Nobody from Balto is ever listening in or joining a call. Only the supervisor. Is there a "barge in" where the supervisor can

	stop the behavior in the call? There is not. It is much more focused on coaching an agent at the moment than stopping it completely.
Is the alert a feature that needs to be enabled?	Yes, it does. Current customers speak with your Customer Success Manager.
Are coaching alerts per team or global organization?	Alerts are set by the supervisor to set up for individuals or by team. On our roadmap, we have the ability for universal alerts to be made.
What playbook items can alerts be linked to?	Anything that is set up in your playbook. Checklist, Deck, Post Call, Notifications. Both Occurrence alerts and absent alerts can be configured to trigger.