

Strategies for Engaging and Supporting Tenured Agents

Thursday, September 15, 2022

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

Welcome to Today's Webinar!

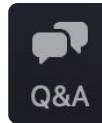


Kevin Wallis

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.

Today's Speakers



Deidre Arnold

Director of Product @ Balto



Kyle Jones

Director of Product @ Balto



Brendan Schmidt

Sr. Product Manager @ Balto

Gamification for All

What is Gamification?



Definition:

The process of turning an activity or task into something resembling a game or competition

Theory:

- Healthy competition increases productivity
- Incentives increase likelihood of engagement
- Automation enhances productivity, success & engagement at scale

Mechanics:

| <i>Gamification Mechanic</i> | <i>Employee Effects</i> |
|------------------------------|--------------------------------------|
| Fast Feedback | See how I'm doing |
| Badges | See my achievements |
| Competition | See who's winning |
| Community | See how to work as a team |
| Leveling Up | See how new skills can be beneficial |

Why Gamification?

Psychologist David McClelland identified three human motivators that fuel all behavior that can help understand the psychological impacts of Gamification:

1. The need for achievement
2. The need for affiliation
3. The need for power

Motivation: Achievement
Outcome: Participation



Sense of achievement
Need for progress
Personal goal setting

Motivation: Affiliation
Outcome: Loyalty



Sense of belonging
Self-expression without judgement
Opportunities for collaboration

Motivation: Power
Outcome: Engagement



Need for recognition
Personal status
Engage in competition

What Elements of Gamification Work?

The most popular gamification elements:

- **71%** mention **badges** as the most common gamification element
- **59%** say they're granted **points** by an app or software at work
- **56%** are awarded virtual or physical **rewards for accomplishments**
- **51%** mention **leaderboards**
- **47%** work with **levels**

The most motivating gamification elements:

1. Rewards
2. Badges
3. Points
4. Leaderboards
5. Levels



How do Employees Feel About Gamification?



89%

Believe their **productivity & results would improve** if their work was gamified



88%

Feel gamified software at work **makes them happier**



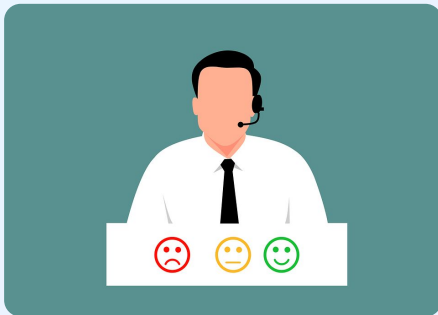
82%

Think gamified elements make them feel a **greater sense of meaning & purpose** at work



89%

Say that when work is gamified, they feel **competitive and eager to complete tasks**





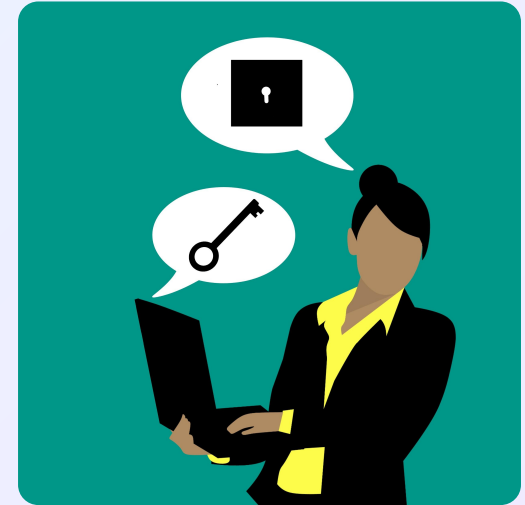
An argument against gamification I often hear from management is that *gamification would be a distraction and undermine productivity*. It doesn't appear from these responses that the employees would be distracted.

- *Karl Kapp on management doubts about gamification*

How *does* Gamification work in the Contact Center?

What are common characteristics of **traditional** Gamification in the contact center?

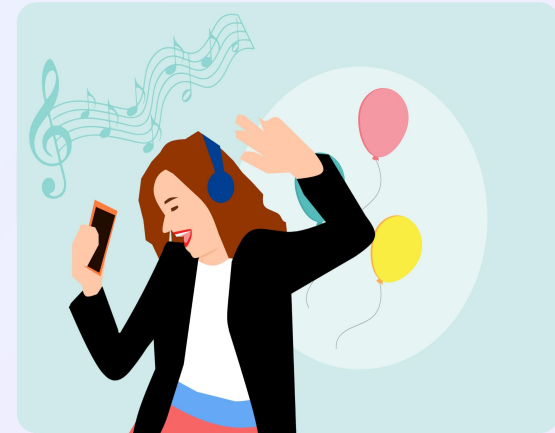
- Focuses on basic call statistics, not targeted outcomes or behaviors
- Requires manual administration & communication
- Can be inconsistent, sporadic, and delayed
- Often prioritizes rewards over results
- Uses applications with complicated game mechanics
- Minimizes the importance of design, and aesthetic appeal
- Might unfairly incentivize newer agents (or tenured agents)
- Highlights competition in the absence of collaboration
- Excludes easily accessible, clear criteria & qualifications



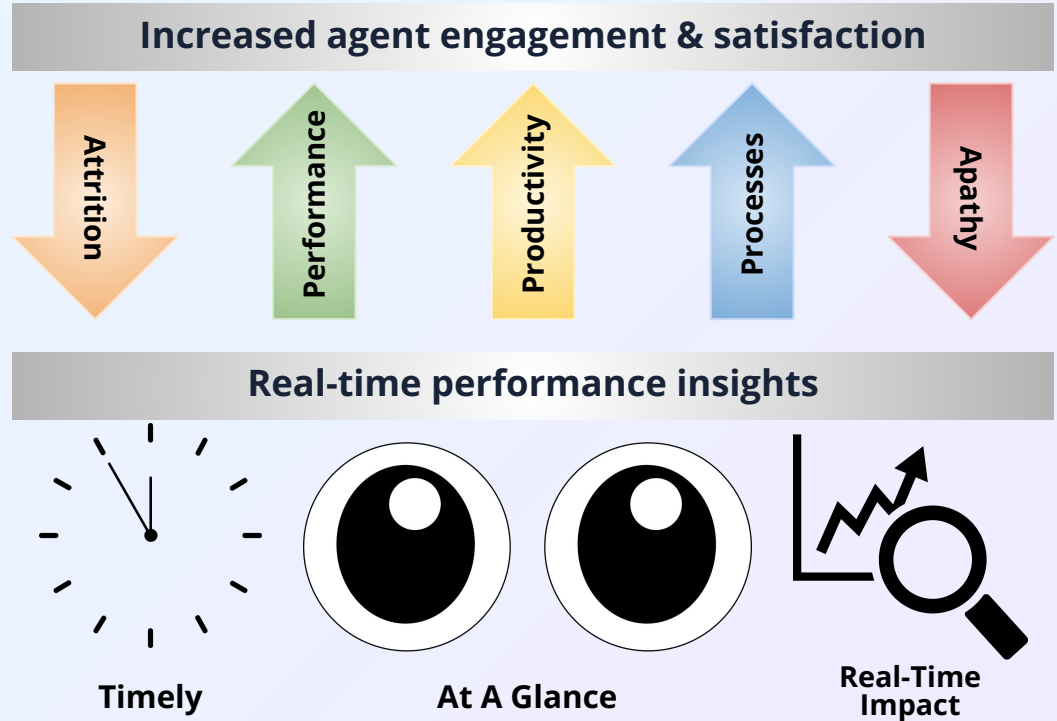
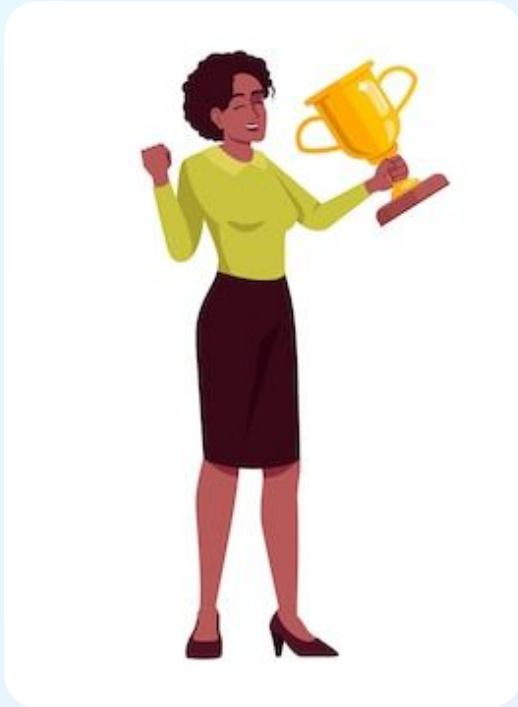
How *should* Gamification work in the Contact Center?

What are characteristics of **effective** Gamification in the contact center?

- Drives outcomes using clearly defined skill & behavior targets
- Creates habits that increase agent engagement and performance
- Includes something for everyone, i.e. new and tenured agents
- Motivates agents to build & repeat desired behaviors
- Provides real-time access to progress and results
- Empowers agents to self-manage performance improvements
- Allows supervisors to easily identify, coach, and incentivize agents
- Encourages competition, collaboration and fun!



What are the Benefits of *True* Gamification?



What are the Benefits of *True* Gamification?

Efficient management and administration of competition and rewards



Centralized Coaching
Data for Management

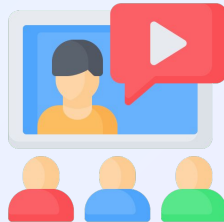


Clearly Defined Challenges &
Success Measurement

Promoting collaboration, team-building, and achievement sharing



Visible Achievements



Remote Coaching



What are the Benefits of *True* Gamification?

Purpose driven business and personal performance improvements

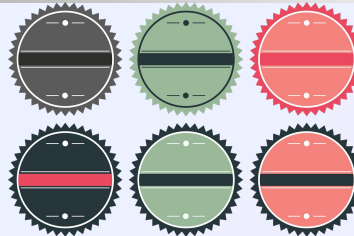


**Targeted Challenges
Boost Business Goals**

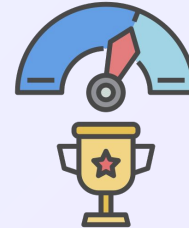


**Competing on
Industry Standards**

Targeted, meaningful and measurable goals for all agents



**Agents Track
Performance By Badges**



**Badges Help Supervisors
Monitor Performance**





... gamification does have great potential, but it's not reaching that potential as currently implemented.

- *Karl Kapp, Gamification expert and TEDx speaker*

What is Balto's Approach to Gamification?

- Supervisors can **send challenges directly to the agent's desktop** following a coaching session, or, even use the game to serve as the actual coaching itself
- Since every agent has different coaching needs, challenges and earning badges can be about **competition with the group as well as self-competition and improvement**
- Challenges based on key objectives that drive business results and performance improvements can be used to **incorporate gamification into agent incentive programs**
- Challenge and Badge defaults allow managers to **ensure that the games drive desired behaviors, not just agent competition** and straight productivity numbers

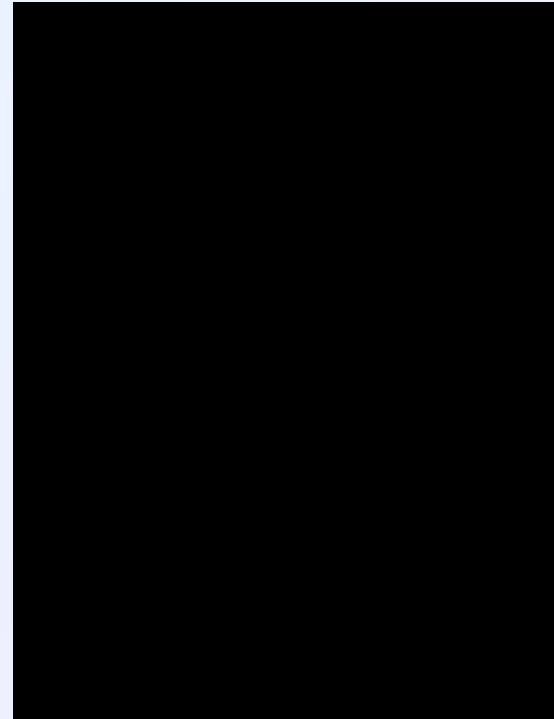


What is Balto's Approach to Gamification?

Challenges

Date Range: Agents: Challenge Type: Status:

| | | |
|--------------|---|-------|
| Team Vs Team | Complete Consistency Teams must have the most calls demonstrating Empathy, Rapport, and Active Listening while using their pop-ups to handle Objections and getting the Confetti. | + 1 ▾ |
| Team Vs Team | Confetti Champions Teams must collect the most winning calls. | + 1 ▾ |
| Individual | Consistent Communicator Participants must demonstrate empathy, rapport and active listening on 90% of their calls. | + 1 ▾ |
| Individual | Empathy Everywhere Participants must show empathy at least 3 times on 90% of their calls. | + 1 ▾ |
| Individual | Listen to Learn Participants must demonstrate active listening at least once on 90% of their calls. | + ▾ |
| Team Vs Team | Objection Obliterators Teams must have the most calls with more than 50% of their decklist rebuttals used. | + ▾ |
| Leaderboard | | |



What are the Benefits of Balto's Gamification?

- Balto Gamification is designed to create habits that are important to business goals.
- The visible progression, mix of short-term and long-term goals, instant feedback and prominent rewards all feed into positive habit formation.
- As your agents build new habits that support your KPIs, you'll see increases in sales, retention and overall business profits.



- And you can track these growth metrics in real-time.
- This will give you renewed confidence that the investment of gamification in contact center environments is paying dividends.

What Separates Tenured Agents from the Pack?

Guiding 150,000,000+ Calls

What We've Learned Along the Way

- Your agents are on the phone for more minutes than you can possibly analyze manually
- Balto has guided over 150 million calls, and we've learned to know where to look at scale



Who's really teaching who?

The Path isn't Always the Path

- Tenured agents develop their own style over time, and it works.
- Use Call Explorer to find where tenured agents add their own flavor & open your mind to learn a thing or two.



Budget


Let's see if we can find an option that works with your budget.

Aside from price, how well does the product we discussed match what you were looking for?

I understand. Let's see if we can find an option that works with **your budget.**



Introducing Call Explorer

 Balto <<

Reporting >

Call Explorer

Playbooks

Leaderboards >

QA Scorecards >

Real-Time Coaching >

User Management >

← Sign out

Calls / 9003237


VOIP ID: 856630741 Agent: Kyle Jones Date Time: Sep 15, 2022 2:38 PM Playbook: Balto Software Sales Win: Yes Duration: 0:06:39

Event Timeline

0:00:00 / 0:06:39

All Events

Expand timeline



0:00:01 **Agent**

Hi, this is Kyle with Balto. How are you doing today?

0:00:04 **Customer**

I'm doing good. How are you?

0:00:06 **Agent**

Good, I like to hear it. I know I'm catching you a bit out of the blue here. Do you have a quick two seconds?

0:00:11 **Customer**

Yeah, but I only have a few minutes then I've got to run.

0:00:08 **Agent**

I'll be quick. The purpose of my call was to see if you'd be open to having a brief conversation just on the topic of your current call operations. I'd love to learn just a little bit more about your team and any potential issues you might be going through to see if Balto could be a good help.

0:00:22 **Customer**

I might be, and who are you with again?

Playbook Events

0:00:02 **Checklist**

Hi ____, this is ____, with Balto. How are you doing today?

0:00:02 **Post Call** **QA Scoring**

Greeting

0:00:09 **Checklist**

I know I'm catching you a bit out of the blue here. Do you have a quick two seconds?

0:01:08 **Deck** **Objections**

Send me some information or email follow up.

No response

0:01:29 **Post Call** **Buyer Reaction**

Compliment

0:01:40 **Post Call** **QA Scoring**

Ownership Drives Results & Satisfaction

- When agents intentionally go off script, they are **doing it on purpose** because they believe it leads to better call outcomes.*
- The more involved agents are in writing their scripts, the **more they'll follow them**, and the happier they'll be overall.**
- Agents who had been at their contact center the longest were most likely to want to **make their script more flexible or dynamic**, followed by making the tone more natural.***

*[Study: Why Do Agents Go Off Script? Mistakes vs Improvisation](#)

**[Study: The Case For the Anti-Script: A Multifactor Analysis of Script Adherence](#)

***[Study: 2 Out of 3 Contact Center Agents Want to Change Their Script](#)

Beautifully Simple

- Top agents have more latitude and it works for them. Lean into that and make their expertise work for you teams.
- Gain deep understanding on what works best and for whom.
- Results guide your decisions.

> My name is _____. Can I start with your first and last name? 🔗 3 🗑️ 1 ⋮ >

3 Variants Hide

- I'm an authorized agent from _____. Can I ask your first name? NEW 🗑️ ⋮
- Do you mind if get your first and last name? 🗑️ ⋮
- Thank you for calling _____, how can I help you today? 🗑️ ⋮

Balto

CHECKLIST ⓘ


- 🔒 This call may be "recorded" for quality and training purposes.
- ✦ My name is _____. Can I start with your first and last name?
- You mentioned that... was ⋮
it
n I say this differently
- Is there anybody who helps you make important decisions like this?
- Based on what you've told me, it sounds like you're looking for...
- Would anything prevent you from going forward with your enrollment today?
- ☑️ Congratulations on your new enrollment! Your confirmation number is _____.

[+ Add checklist item](#)

IMPORTANT PROCESS CHANGE ^

You are now required to complete a **new compliance item**.

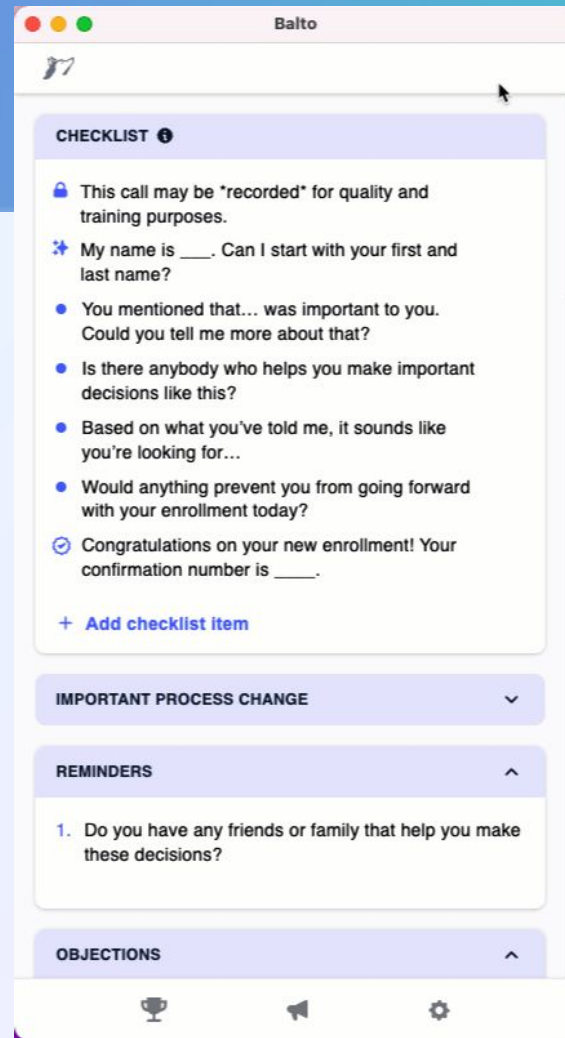
"IS THERE ANYBODY WHO HELPS YOU MAKE IMPORTANT DECISIONS LIKE THIS?"



"I say this differently..."

- ▶ Directly sourced from your top agents
- ▶ Encourages Interaction & Feedback
- ▶ Viewable in Balto Cloud

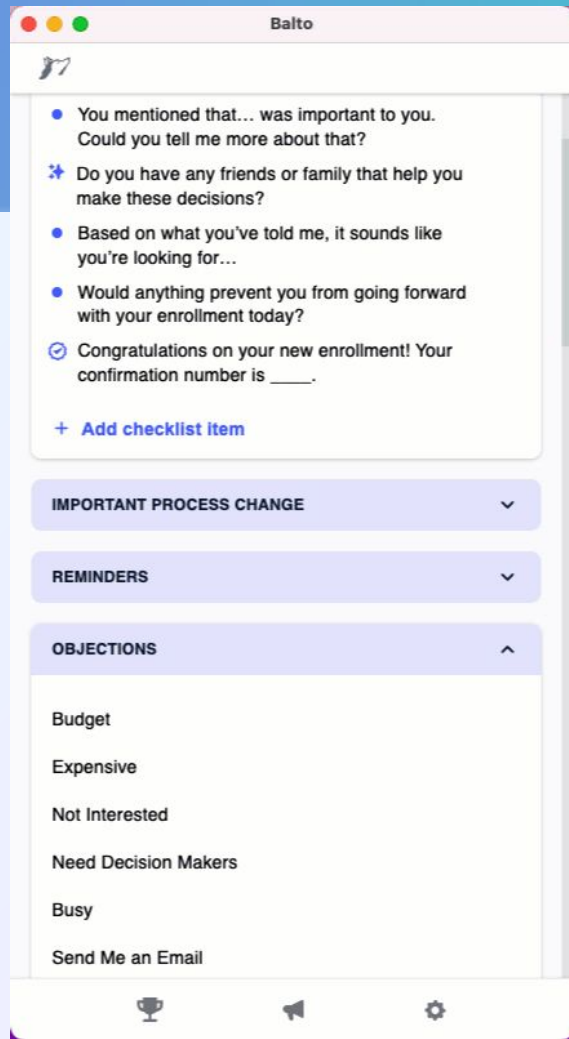
- ▶ Increased Checklist Usage
- ▶ Increase Agent Satisfaction
- ▶ Reduced Time to Source New Content



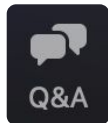
Capture Habits

- ▶ Checklist Variations
- ▶ Experiment with New Checklists Items
- ▶ Minimize Decks
- ▶ Snooze Decks

- ▶ Managers can Lock Checklists
- ▶ Manager Configure Top-Agents



Q&A



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

Thank you for joining us!

For more information, visit balto.ai