

Boost Agent Performance by Scaling Excellent Conversations

*Using A.I. to Improve Calls, Coaching,
and Q.A. in Your Contact Center*

Tuesday, April 19, 2022

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

Balto 

Today's Speakers



Lonnie Johnston

Sr. Vice President of
Customer Success, Balto



Lauren Tychsen

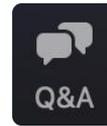
Balto Marketing Team

Today's Agenda

- **Recent Developments in the Contact Center**
- **Problems, Solutions, Customer Stories**
 - Agent Conversations
 - Coaching
 - Quality Assurance
- **Q&A**



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.

Recent Developments in the Contact Center

Where We Were

Pre-Pandemic

- Brick and mortar
- Manual call review
- High customer expectations



Mid-Pandemic

- WFH jumped from 10% to 80%*
 - Coaching challenges
- Consumer patience



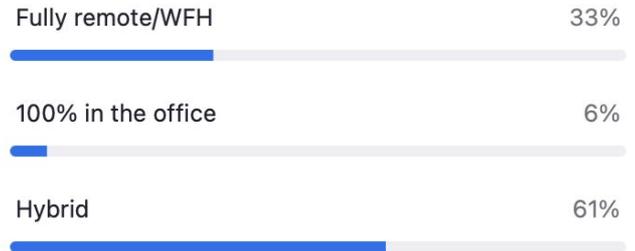
**Customer Experience Management State of the Market Report (2021), Everest Group*

Poll Question

Poll: How will your team work post-pandemic?

- Fully remote ❌ 👖 (“Pants? ...what pants?”)
- 100% in the office 👔 👠 🙌 (“Fine, I’ll wear pants...”)
- Hybrid 🩴 👙 🏖️ (“...are pants negotiable?”)

Poll results during broadcast:



Where We Are

Post-Pandemic

- Hybrid call centers
- Better tools/systems
- Increased comfort
- More coaching (somewhat)
- Heightened customer expectations



Poll: How will your team work post-pandemic?

- Fully remote  33%
- 100% in the office  6%
- Hybrid  61%

"The majority of our company has gone into the hybrid model... I don't think workplaces are ever going back to the same way - they're never going to be fully staffed."

- Recent Balto customer conversation

Where We're Headed

Future of the Contact Center

- Better customer experiences
- Quicker call resolutions
- More impactful conversations
- Improvements in sales
- Nearly flawless compliance scores

**Human agents enabled with
powerful AI tools...**



*"What does the contact center
of 2030 look like?"*

**How can contact centers
leverage AI to boost
performance and scale
excellent conversations?**

1. Conversational AI
2. AI for coaching
3. AI for quality assurance

1. Conversational AI

Traditional Agent Conversations

Problem

Solution

Customer Story



“Boiler Room” approach



vs. Remote, virtual, self-reliant

Traditional Agent Conversations

Problem

Solution

Customer Story

Problems with traditional agent conversations

- Inconsistency between an individual rep's conversations
- Inconsistency across entire team
- Rigid, static scripts
- Difficulty responding to rebuttals in the moment
- Agents' lack of empathy
- Old models did not account for remote work

Conversational AI

Problem

Solution

Customer Story

How can contact centers leverage conversational AI?

- Recognize speech, patterns, phrasing
- Guide agents in real-time
- Help overcome objections
- Continuous learning with each call
- Scale best practices to all agents immediately
- Create a team of top performers

Real-Time Guidance

Problem

Solution

Customer Story

How does Balto use **conversational AI**?

- Automatically listens to 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



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?
- Is your hesitation more that the product is too expensive or that cash is a little tight?

Is this helpful?



ARS – Debt recovery services

Problem

Solution

Customer Story

- **Previous challenges**
 - Manual call listening to evaluate and track compliance
 - Inconsistent and unstructured agent rebuttals
 - Difficulty retaining information
- **Adopted Balto's Real-Time Guidance in 2019**
- **Results**
 - **Improved compliance** by scaling best practices
 - Reduced new agent ramp time by **2 weeks**
 - In 30 days, improved collection of personal info **from 41% to 87%**



"I've been a big Balto fan since the beginning after seeing the very first demo. I knew it was going to be a game-changer for call centers... It has been my #1 tool purchased, and I believe we have received the most return on investment from Balto."

Randi Gabel

Collections Floor Manager

2. Coaching with AI

Traditional Coaching

Problem

Solution

Customer Story



Post-game film review

vs.



In-game adjustments

Traditional Coaching

Problem

Solution

Customer Story

Problems with traditional coaching methods

- Easily forgotten
- Multiple sessions to retrain
- Costs a lot of money
- Corrections after a call is already lost

Traditional Coaching

Problem

Solution

Customer Story

Balto surveyed **515** contact center managers

Here is what we learned...



45%

Of managers use call recordings to coach and re-coach their agents



4.2 Times

Managers report coaching agents **an average of 4.2 times** before they actually implement the new skill



75%

Managers spend **75% of their time** re-coaching their agents

Coaching with AI

Problem

Solution

Customer Story

How can contact centers leverage AI for coaching?

- Customizable, real-time alerts
- Immediate corrections and results
- Less time listening to recordings

Real-Time Coaching

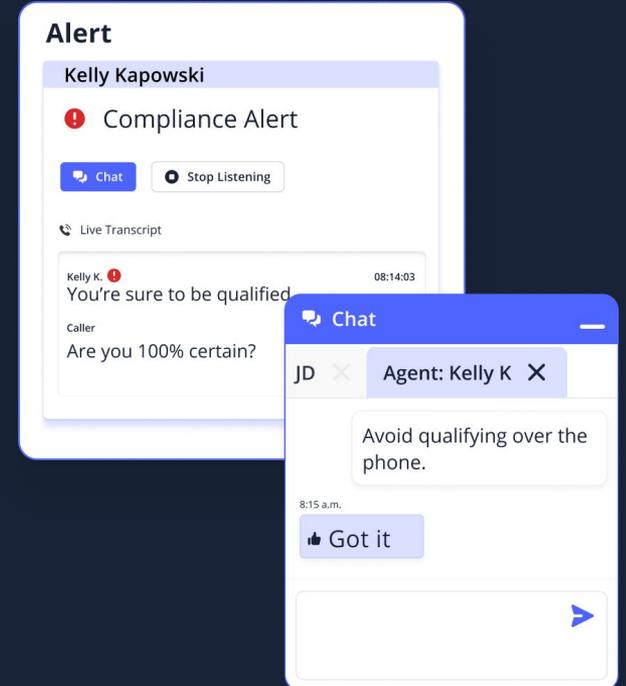
Problem

Solution

Customer Story

How does Balto use AI for coaching?

- Automatic triggers alert managers for coaching opportunities in real time to drive immediate agent improvement by coaching in the moment
- Real-time transcripts and live listen allow managers to see what caused the alert so they can then immediately impact the outcome of the call using agent chat or by joining the call



Health Insurance – Online insurance marketplace

Problem

Solution

Customer Story

- **Previous challenges**
 - Delayed coaching meant agents would not remember
 - Extremely time-consuming for managers
 - Supervisors spent more time prepping than coaching
- **Adopted Balto's Real-Time Coaching in 2021**
- **Results**
 - Increased compliance scores by **10%**
 - Reduced AHT by **17%**
 - In 1 month, alerts improved sales by **19%** and outbound call volume by **16%** for low-performing agent

Large, nationwide insurance marketplace

- Over 700 agents using Balto

"I've heard nothing but great, positive feedback [from our agents], and it's absolutely worth the investment."

Sales Leader

3. Quality Assurance with AI

Traditional QA

Problem

Solution

Customer Story



"Shot in the dark" sampling and Can't keep up with volume

Traditional QA

Problem

Solution

Customer Story

Problems with traditional QA methods

- Listen to random recordings
- Read through transcripts
- Survey feedback
- Mistakes caught too late
- Sales, CX, compliance scores overall without correlation

Quality Assurance with AI

Problem

Solution

Customer Story

How can contact centers leverage AI for QA?

- Monitor effectiveness instantaneously
- Review 100% of calls, not just 1-2%
- Removes “spot-checking”
- Correct mistakes before they become habits
- Continuous improvements
- Scale best practices

Real-Time QA

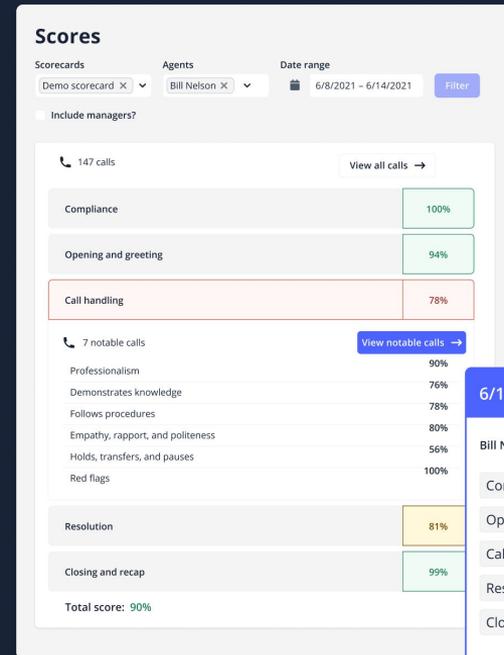
Problem

Solution

Customer Story

How does Balto use AI for QA?

- Automatically scores 100% of calls, instantly, using customized criteria
- Detailed real-time reporting helps quickly identify trends driving agent performance and root causes of low scores across individuals, teams, and entire organization.



UGA Finance – Third-party payment collector

Problem

Solution

Customer Story

- **Previous challenges**
 - Only QA scoring 1% of call volume
 - Time-consuming, costly, manual QA processes
 - Ineffective compliance enforcement and training
- **Adopted Balto's Real-Time QA in 2021**
- **Results**
 - Calls analyzed and scored: **100%**
 - Agent performance scores: **80%** (+40%)
 - **Thousands of dollars saved** on dedicated QA staff
 - **Increase in retention** of new agents



"Real-Time QA has taken the burden from me of having to sit down and try to map out three to four hours of my day just to pull phone calls. Now all the information I need is there in real-time"

Sean Wheaton
Contact Center Supervisor

How can Balto help?

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.

Balto 

Schedule a Demo

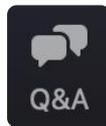
Click the link in the chat
to schedule a demo!

Or visit:

www.balto.ai/get-demo

Thank you!

Q&A



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