

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

10/18/2022

| Question | Answer |
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| 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 |

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| | 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. |