



# Your Real-Time CX Enhancement Plan

How to leverage in-the-moment agent guidance to  
de-escalate issues and create loyal customers



Learn why CallMiner was named  
the Leader in The Forrester Wave™ :  
Conversation Intelligence for  
Customer Service, Q3 2023





## Introduction

Being a contact centre agent has never been more difficult. Digital self-service options haven't fully relieved the pressure, either. Typically, the toughest, most emotionally charged customer interactions land squarely in your agents' laps. Without additional support, these conversations can be daunting to manage. In some cases, they can even lead to costly complaints or customer churn.

Job-related stress, a lack of training and coaching, and other cultural issues are resulting in contact centre **turnover rates of 58% or more**. With trends like the Great Resignation, agents feel empowered to seek out employers that focus on improving their employee experience. According to **Forrester**<sup>1</sup>, a better agent experience means "moving away from an overly cost-conscious view of the function to a more holistic understanding of the value that good customer service brings."

With that said, it's equally hard for many contact centre managers and supervisors to balance the management of high call volumes with investing the time to provide the on-the-job feedback agents need to succeed. These challenges are magnified in remote or distributed work environments and require significant cultural change. However, to avoid high turnover and agent burnout, smart organisations will do more to support their agents in their critical moments of need. Knowing where to start and how to invest in the right technology is key.

That's where real-time agent guidance can help. AI technology, such as conversation intelligence platforms, can make it possible to impact the outcome of a customer interaction while it's still happening. These insights can (and should) be combined with post-interaction analytics, which provide teams with valuable information on trends at scale across your entire customer base. Together, both supervisors and agents can get the data they need for more effective coaching, skills refinement, and holistic customer experience (CX) improvements.

When agents and supervisors are aligned on how to deliver the best CX, your organisation can provide a whole new level of consistency and efficiency. Real-time guidance can help de-escalate issues and improve important metrics like average handle times (AHTs), ultimately helping agents give customers a great service across the board.



<sup>1</sup>. Forrester, The Three Customer Service Megatrends in 2022, March 15, 2022, <https://learning.callminer.com/c/whitepaper-forrester-megatrends-2022?x=CFI8z6&lx=amFxJO>

## Key benefits of real time

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If you're not using real time in your business, there are many good reasons to start. From empowering agents to take control of difficult interactions, to mitigating compliance risks, to improving churn and sales metrics – there are myriad benefits of leveraging real-time AI, including:

### Driving in-the-moment CX interventions

Real-time guidance – displayed on an agent's computer screen to provide guidance while the call is actively taking place – can identify unhappy customers and equip agents with proactive steps to retain them. For example, the system can flag churn-likely behaviour or customer agitation, and direct agents to marketing offers such as complimentary products or services, or discounted rates. These timely offers can help retain customers in sensitive situations. In instances where a competitor is mentioned, real-time alerts powered by integrations to knowledge systems can also equip agents with detailed information to handle potential customer objections – such as competitive battlecards.

In addition, real-time conversation intelligence systems can de-escalate emerging issues as they happen, or automatically elevate situations to a supervisor to prevent formal complaints by providing agents the support they need. Supervisors can either jump in and help by joining the call directly or listen in and provide direction digitally.

Finally, this technology can identify customer retention and upsell opportunities with dynamic suggestions. For example, if a customer mentions a need for a product or service they may not know about, a real-time alert can help guide an agent toward an appropriate offering.

### Optimising agent performance

Agents are under a lot of pressure to handle a high volume of complex situations. Providing the appropriate level of coaching and training can help improve employee retention rates and job satisfaction levels. A lot of this can be done through post-interaction analytics, but real-time guidance offers an added layer of in-the-moment support.

Real-time systems allow you to customise your own set of alert thresholds to direct agent attention toward the next best action to navigate even the most complex situations, without overwhelming them. Using these systems correctly can help improve key contact centre efficiency metrics, like silence, average handle time and first call resolution. On the supervisor's side, reviewing real-time guidance after the fact can help present new, targeted opportunities for coaching and training.

Real-time guidance can either surface when agents say something right (as a means of positive reinforcement) or as agents need help refining or improving an interaction (e.g., showing empathy to a customer in need).

### Ensuring compliance and mitigating risk

Often, organisations are required to follow a strict set of compliance guidelines. Real-time conversation intelligence systems can help teams comply with these regulations by automatically redacting sensitive audio, text, and transcription data. In addition, these systems can identify agents' legal and script compliance, including the timing of required disclosures. For example, if a collections agent leaves out a crucial part of the introductory script, an alert will deliver immediate resolution guidance. In particularly tricky situations, these systems can provide supervisors with real-time visibility for in-the-moment intervention.

## Best practices for real-time guidance

You now understand why your organisation might consider adopting a real-time system, so let's look at how they can be used most effectively – without getting in the way of agent progress. It's critical that agents buy into using a real-time system, as they can be this technology's biggest advocates (or detractors, if done incorrectly).

Real-time conversation intelligence uses AI to correlate what's happening during a current interaction with how agents handled similar issues on hundreds or even thousands of other similar interactions. From there, the system can alert the agent and determine what next steps or actions an agent can take.

Some best practices used by top organisations include:

**Setting boundaries:** Determine both the negative (e.g., emotionally charged interactions) or positive (e.g., happy customers primed for upsell/cross-sell opportunities) interactions that merit an alert.

**Getting the timing right:** Help agents fix mistakes in the moment, such as forgetting to communicate that a call is being recorded. Alerts can also aid in de-escalations before involving a supervisor, linking agents to the resources they need, or alert supervisors to when they might need to assist.

**Using praise:** Gamification or alerts that include positive reinforcement help improve agent performance and morale. Sometimes, this can be simple as providing a thumbs up or smiley face emoji during a positive customer interaction.

**Keeping alerts relevant to the individual:** An experienced agent may not need as many alerts as a new agent, so it's important to fine-tune the system for relevancy. Even better, agents can set the thresholds for their own alerts as their use of the system matures.

## Top 7 secrets to effective real-time alerts

- Involve agents and supervisors in development process
- Train agents and supervisors on the use of application
- Provide constructive and positive feedback on a consistent basis
- Keep agent pop-ups short and easy to read
- Limit the amount of instructions per call
- Constantly enhance the system based on customer/agent feedback
- Share performance improvements with agents, so they know the value of real-time system



# Seven uses for real-time conversation intelligence alerts

Now that we know why and how to use real-time alerts, let's drill down into some of the most common use cases.

## Identifying customer emotion

Real-time conversation intelligence can identify when a customer sounds angry, frustrated or another negative emotion. These things can be flagged to the agent if they're not taking appropriate action to effectively de-escalate a situation. And if this doesn't work, supervisors can also be alerted so they can intercede.

## Up-sell/cross-sell opportunities

These alerts identify callers who are well-suited for an up-sell/cross-sell, as well as the specific offer for agents to present to the customer. The real-time application can pick up on the nuances of a conversation, identify the appropriate offering, and provide instructions or a script for the agent to follow to complete a sale.

## Sales/collections effectiveness

These notifications can recommend rebuttal wording or suggested verbiage to overcome objections, as well as detecting pace, tone, intensity, and other factors to help agents maximise their sales or collections efforts.

## Productivity and efficiency

Certain alerts keep agents on track by directing them through targeted conversations that minimise non-productive time, while providing guidance to help them complete customer requests efficiently.

## Coaching consistency

Alerts can help deliver systematic coaching content to ensure the same message is communicated in a consistent format to all agents, regardless of their team or supervisor. When agents are reminded of coaching insights when they need it most, they can action that guidance immediately.

## Employee engagement/gamification

It's equally important to recognise and reward agents for outstanding performance. These interactions encourage and motivate agents when they are in the midst of a difficult call by sending pop-ups such as an emoji or a chat. At the end of a customer conversation, the system can send agents rewards for a job well done.

## Analytics-enabled quality management (AQM)

These alerts provide real-time feedback for each component of a call, such as executing the call intro properly, so that an agent knows if they are on the right track. This is intended to be a method for constantly providing positive and constructive feedback and reinforcement.



## Case study: Supporting vulnerable customers

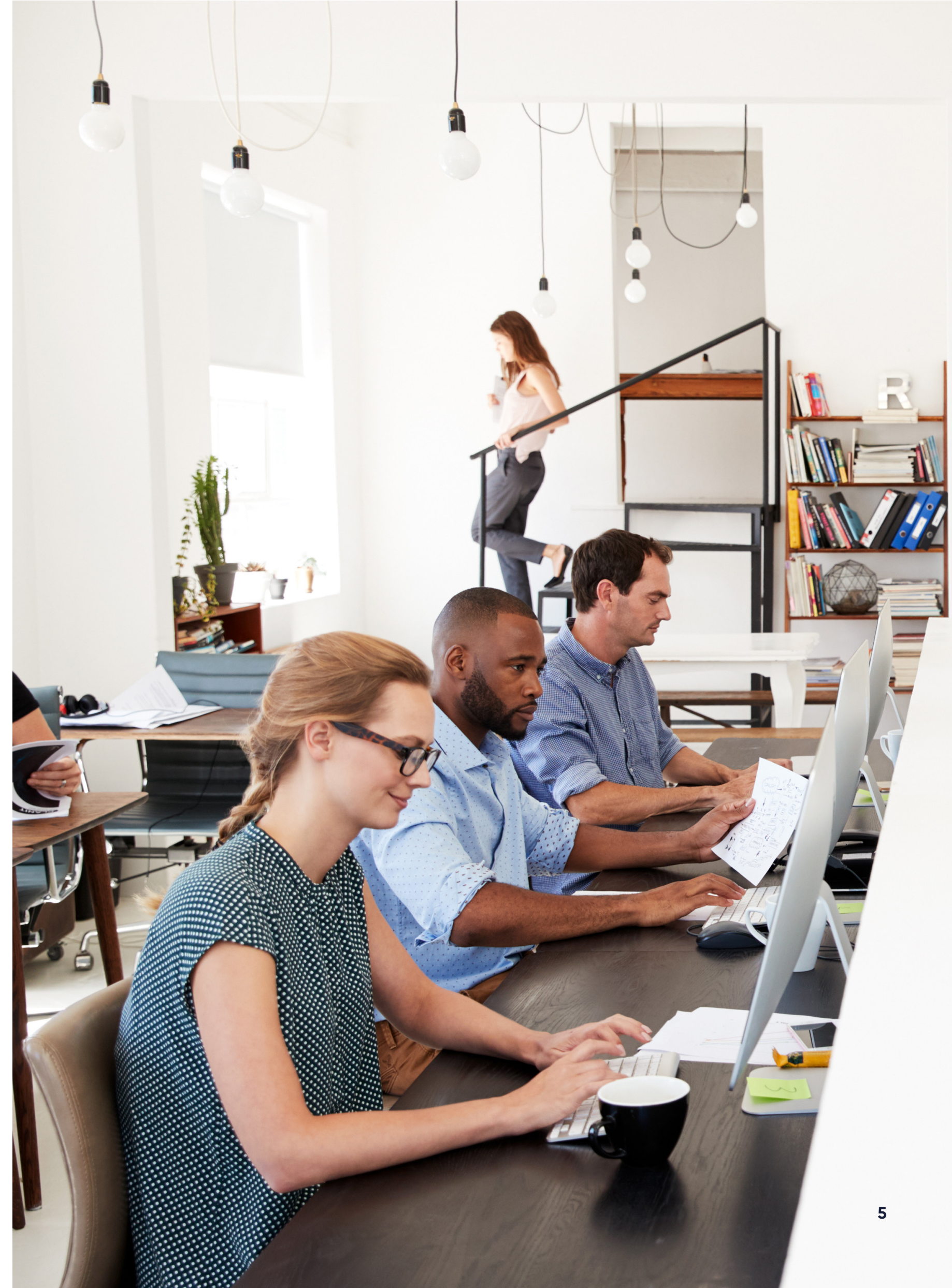
One of the UK's largest collections companies looked to the power of real-time agent guidance to ensure customers in vulnerable circumstances received support from the company. As some customers can struggle to communicate their needs fully, the company's agents needed to identify when they were interacting with such customers, even when the customer did not make it clear what the issue was.

Using post-interaction conversation intelligence, the company identified triggers, words and phrases associated with what it termed "vulnerability," so agents could pre-empt and understand the needs of customers in future interactions, even if the individual did not fully disclose the details of their situation.

By combining these vulnerability triggers with real-time conversation intelligence and agent guidance, agents could receive helpful notifications that were highly relevant to a customer's needs and situation. As a result, the collections company saw a 60% decrease in unresolved calls due to the agent missing a vulnerable customer trigger.

The customer operations enhancement manager at the company said:

**"We can prove that CallMiner's platform is invaluable in improving people's lives, particularly when they are at their most vulnerable. It also provides crucial support to our agents handling these sensitive issues."**





## How real-time conversation intelligence technology works

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Now, let's get into some details about how real-time conversation intelligence technology works, starting with transcription. It starts with the system recording calls and creating transcripts in real-time, and by identifying the agent's and the customer's separate voices, the technology creates speaker-separated audio streams. Then, insights can be categorised for what matters most to each of the people on the call. For compliance and security reasons, the system immediately redacts audio containing personally identifiable information (PII). This data always exists in a PCI state. In other words, the data is never at rest.

Notifications, alerts and guidance are delivered through existing interfaces within agent's workflow (e.g. on the agent's desktop). Real-time alerting and guidance can be triggered by following certain behaviours. For example, if something isn't said in the right timeframe, the agent receives a prompt for the next best action to be successful. Within the alert, agents can see the title, severity, and a message of what to do next. These alerts can also provide links to knowledge bases or offering data sheets for upsell opportunities.

In difficult situations, the alert can notify the supervisor to help them intervene. On the supervisor's side, alerts give insights on how to coach the right way or how to intervene directly themselves. These notifications promote a culture of interactivity between the supervisor and the agent. Post-analysis helps supervisors evaluate which alerts were triggered. These insights can help supervisors work with agents face-to-face and guide them on what they should be doing differently.



## Improving the customer experience with real time

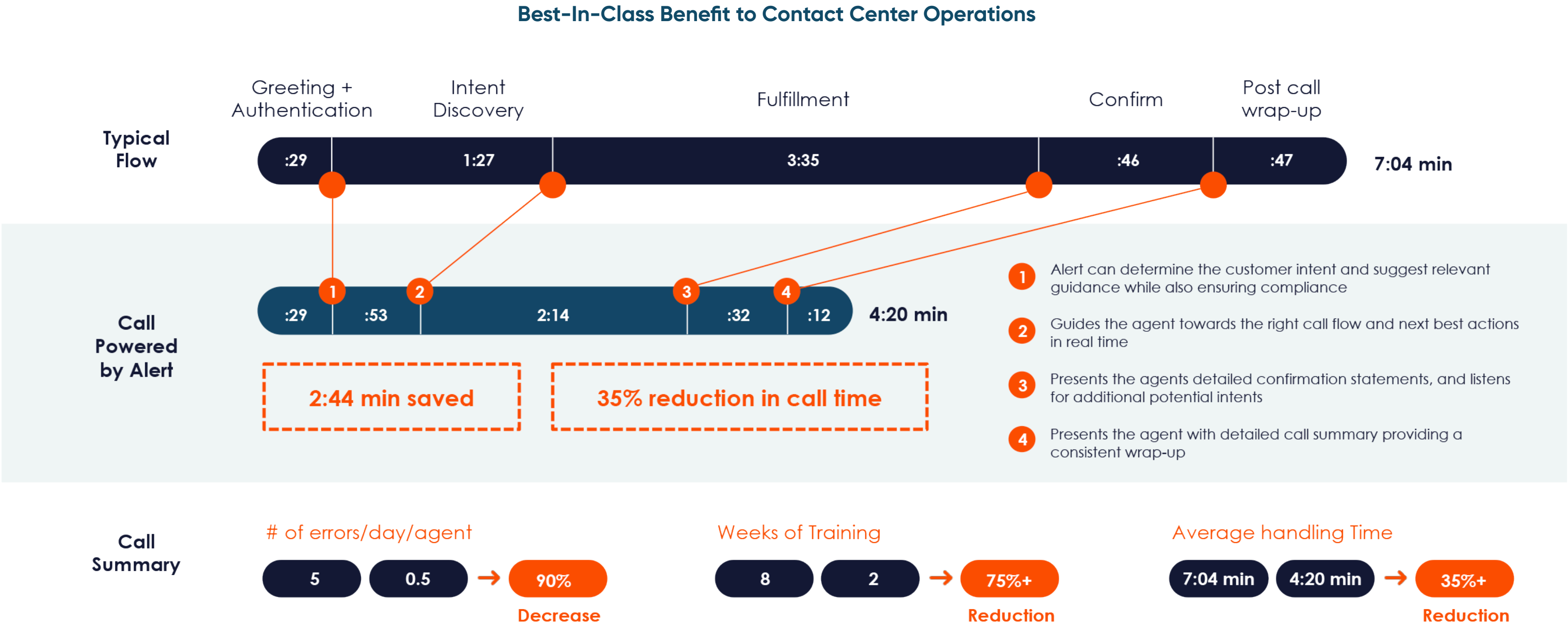
Real-time conversation intelligence can shorten the customer journey in a positive way. In fact, these alerts can be used throughout the customer journey to improve the efficiency and effectiveness of agent-to-customer interactions. In the intent phase, real-time intelligence can help the agent to interpret exactly what the customer needs. For example, if a customer mentions paying a bill, an alert can bring up the steps to make a payment, cutting down on the discovery phase of a call.

Later on in the customer journey, in the fulfilment phase, alerts can guide the agent toward the next best action for a specific customer. These insights can create a consistent experience from agent to agent. Finally in the confirmation and post-call wrap up phases, an agent can receive a summary of the interaction, which shortens the overall handle time for an interaction.





The graphic below details how real time can reduce errors, improve training times, and shorten AHTs.



Notes: Information is based on real data from selected customers in the Banking, Insurance and Telecom spaces

As data about successful call outcomes is developed over time, AI helps the system zero in on the factors that matter most, so that guidance becomes even more relevant to agents. Measuring success can happen by determining if the advice is relevant to agents or being ignored. If the agent isn't getting value or behaviour doesn't change, agents or their supervisors can modify alerts or address issues in a one-on-one setting. Refining rules for relevancy helps identify areas where even the top-performing agents can improve via real-time guidance.



## Getting started with real time

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Implementing real-time conversation intelligence is a team effort that should involve the buy-in of your agents and supervisors. It can help to start the project with a small sample of agents. Setting a 30-day window should give you enough time to evaluate the results of your pilot and see how effective real time can be for your organisation.

After evaluating what works and doesn't work, make the necessary changes for the rest of your workforce. From there, gently roll out the system to the rest of the agents. Have the agents review the results of their real-time alerts in a controlled fashion and ensure that they receive the support that they need to improve upon key skills. Using alerts for positive reinforcement, as well, can provide a critical morale boost when agents need it most. Over time, as agents gain skills, you can reduce the number of alerts or allow agents to select exactly what types of alerts they receive and when.

Ultimately, a real-time conversation intelligence system will provide agents with the support they need to handle even the most complex and emotional customer interactions. Used in tandem with one-to-one coaching and group training, these systems can give agents the skills they need to succeed on the job and advance in their careers – leading to improved employee and customer retention as well as employee and customer satisfaction.





## About CallMiner

CallMiner is the global leader in conversation intelligence to drive business performance improvement. Powered by artificial intelligence and machine learning, CallMiner delivers the industry's most comprehensive platform to analyse omnichannel customer interactions at scale, allowing organisations to interpret sentiment and identify patterns to reveal deep understanding from every conversation.

By connecting the dots between insights and action, CallMiner enables companies to identify areas of opportunity to drive business improvement, growth, and transformational change more effectively than ever before. CallMiner is trusted by the world's leading organisations across retail, financial services, healthcare and insurance, travel, and hospitality, and more.



### Corporate Headquarters

200 West Street  
Waltham, MA 02451

### Sales

[sales@callminer.com](mailto:sales@callminer.com)

### Social

[facebook.com/callminer, inc.](https://facebook.com/callminer, inc.)

[twitter.com/callminer](https://twitter.com/callminer)

[linkedin.com/company/callminer](https://linkedin.com/company/callminer)

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