# Level AI

# How A Large Fintech Scaled Its Contact Center Operations with Conversation Intelligence and QA Automation

**A Conversation With The Company's Head of Customer Service Excellence**

# Their contact center operations

Canada

USA

Philippines

Australia

## Call Center Tech Stack

GENESYS   salesforce   Looker   CALABRIO   Amazon S3   Amazon Redshift   ▶   GENESYS   salesforce   Level AI

**~1,500** agents

**100** QA analysts for a
**20** agents to
**1** QA auditor ratio

Around the globe

In House and across
multiple BPOs

Call volume upward of
**~300,000** calls /month

**Channels:**
**Phone, chat, email, and secure messaging**

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# Goals and vision for the Service Excellence team

## Scale Customer Experience to support the company's hyper growth

Increase agent performance & accelerate agent onboarding

Increase merchant & customer satisfaction

Pursue operational excellence via data-driven process improvement

Harness the trove of our conversational data for customer and product insights



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## Identifying Pain Points and Solving Them

# Before Level AI - What were the pain points?

| | |
|---|---|
| **SUMMARY** | • Spotty visibility into what was going on at the program level in the contact center<br><br>• Neither the tools, data, nor processes to adequately monitor quality assurance<br><br>• Very manual QA, and limited QA coverage |

## QUALITY ASSURANCE

- Lacked clear understanding of QA program performance
- Hard to find and follow through on compliance issues
- Inability to understand what might drive a spike in call center calls
- < 2% call being audited
- No way to spot escalation needs

## AGENT PERFORMANCE

- Spotty visibility into agent performance
- Misalignment of agent performance and agent behavior
- Agent score not representative of their overall performance (<2% of conversations scored)
- Difficulty deriving performance insights and trends based on manual audits

## PROCESSES

- Unscalable processes: inefficient and ineffective
- Spreadsheet-driven processes
- Constant context switching
- Long and time-consuming evaluation
- No visibility into performance drivers

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# How we were tracking audits, even with QA tooling

| Specialist Name | QA - Week 1 Form Audit Week: | 11/28/2021 12/04/2021 | | | QA - Week 2 Form Audit Week: | 12/05/2021 12/11/2021 | | | QA - Week 3 Form Audit Week: | 12/12/2021 12/18/2021 | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Can Pull On | 1 | 2 | Reviews Sent | Can Pull On | 1 | 2 | Reviews Sent | Can Pull On | 1 | 2 | Reviews Sent |
| | 11/25 | 4323640 | 7410017 | 12/02 | 12/03 | 6983883 | 2216424 | 12/07 | 12/08 | 6167155 | 7662391 | 12/15 |
| | 11/25 | 7656590 | 4668891 | 12/03 | 12/04 | 4767242 | 3053025 | 12/08 | 12/09 | 1887562 | 2533137 | 12/15 |
| | 11/27 | 2376603 | 4933746 | 12/02 | 12/03 | 6208151 | 7863360 | 12/07 | 12/08 | 3980532 | 3474695 | 12/15 |
| | 11/25 | 2363282 | 6306439 | 12/02 | 12/03 | 4192404 | 3192550 | 12/08 | 12/09 | 8251505 | 2415986 | 12/15 |
| | 11/25 | 7361156 | 8532815 | 12/02 | 12/03 | 5509259 | 1274678 | 12/07 | 12/08 | 5785895 | 6729627 | 12/15 |
| | 11/25 | 6678695 | 6519672 | 12/02 | 12/03 | 2154593 | 8431327 | 12/08 | 12/09 | 8226557 | 2181031 | 12/15 |
| | 11/25 | 2658470 | 8361409 | 12/02 | 12/03 | 5134964 | 4024101 | 12/07 | 12/08 | 2872700 | 5953683 | 12/15 |
| | 11/25 | 3486485 | 4892607 | 12/02 | 12/03 | 6117527 | 1423708 | 12/08 | 12/09 | 6051220 | 7228699 | 12/15 |
| | 11/27 | 7722008 | 1417900 | 12/02 | 12/03 | 2323326 | 8594335 | 12/07 | 12/08 | 3173845 | 2580254 | 12/15 |
| | 11/25 | 8186723 | 5556910 | 12/02 | 12/03 | 7864715 | 6550457 | 12/07 | 12/08 | 1576982 | 8160725 | 12/15 |
| | 11/25 | 1677585 | 5243233 | 12/02 | 12/03 | 6174400 | 4271225 | 12/07 | 12/08 | 4393911 | 6561823 | 12/15 |
| | 11/27 | 6985707 | 4371433 | 12/03 | 12/04 | 1411438 | 6577629 | 12/08 | 12/09 | 8628306 | 2632829 | 12/15 |
| | 11/25 | 5200589 | 2772541 | 12/02 | 12/03 | 7331506 | 2189550 | 12/07 | 12/08 | 2370795 | 2487020 | 12/15 |
| | 11/27 | 5527300 | 7238503 | 12/02 | 12/03 | | OOO | -- | -- | 8128665 | 6423391 | 12/15 |
| | 11/25 | 2240488 | 4326879 | 12/03 | 12/04 | 2415312 | 7617852 | 12/07 | 12/08 | 2708013 | 8072964 | 12/15 |
| | 11/25 | 8326672 | 2529390 | 12/02 | 12/03 | 4943882 | 7234659 | 12/07 | 12/08 | 3280524 | 2378455 | 12/15 |
| | 11/25 | 1935168 | 8370718 | 12/03 | 12/04 | 2584864 | 6363184 | 12/08 | 12/09 | 5882784 | 8862679 | 12/15 |
| | 11/25 | 1831787 | 4058655 | 12/02 | 12/03 | 1516505 | 1546476 | 12/08 | 12/09 | 1479849 | 1644090 | 12/15 |
| | 11/25 | 4211325 | 8731862 | 12/02 | 12/03 | | OOO | -- | -- | OOO | back 12/20 | |

# What were the pain points? - Before Level AI (cont'd)

| | |
|---|---|
| **SUMMARY** | • Spotty visibility into what was going at the program level in the call center<br>• Neither the tools, data, nor processes to adequately monitor quality assurance.<br>• Very manual QA, and limited QA coverage |

## REPORTING

- Lack of call center and agent performance reporting capabilities

- Very manual to even get to an overall QA score

- Or a compliance fail rate

- Stagnant dashboard; no ad-hoc analytics capabilities

- No self-serve capabilities for agents, team.

## AGENT COACHING

- Missed agent coaching opportunities

- Inability to search and find conversations that could benefit from coaching

- More time spent on evaluating and auditing, than on coaching

- No way to identify skill gap

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# How is this large fintech company using Level AI?

| Quality Assurance Automation | Agent Coaching | Supervisor Calibration | Call Center & Voice of the Customer Analytics |
|---|---|---|---|

**Conversation Intelligence Engine**

# How we turned around our Contact Center Operations with Level AI's Customer Intelligence Engine

## Level AI's Conversation intelligence engine detects

- **Why people are calling in**
  - e.g. new loan application, fraud, refund, checkout issues etc.

- **Specific elements or sentiment in the conversation** called "conversation tag"
  - e.g.: greetings, identification verification, disputing a purchase, asking for refund, unsatisfied, frustrated, happy and delighted customer etc.

## Which enables Level AI platform capabilities

InstaScores 100% of conversations

Automates QA processes

Enables a slew of reporting and ad-hoc analysis

Compliance monitoring

Screen recording

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# How we are solving for customer experience with Level AI

Level AI intelligence engine monitors 100% of conversations on all channels (calls, emails, secure messaging)

**QA Automation & Agent Performance**

- Revamped agent evaluation scorecard to over-index on customer experience.

- Managing ~ 20 different scorecards (per scenarios, channels, team, seniority etc.) into Level AI. No more spreadsheets!

- Level AI InstaScores 100% of conversations based on these scorecards

- Manual but more strategic audits

  - Can sample conversations surgically on any criteria (e.g agent tenure, topic, compliance issue, conversation score or sub-score for a particular area of the scorecard, BPO vendor)

  - Automated workflow to route cases to QA auditors based on any of these criteria

- Visualize, report, slice and dice agent performance on any dimensions

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# User Workflow: Automated Quality Management



Snippets zero in on the most important parts of the call - from Scenarios to Sentiment to Dead Air
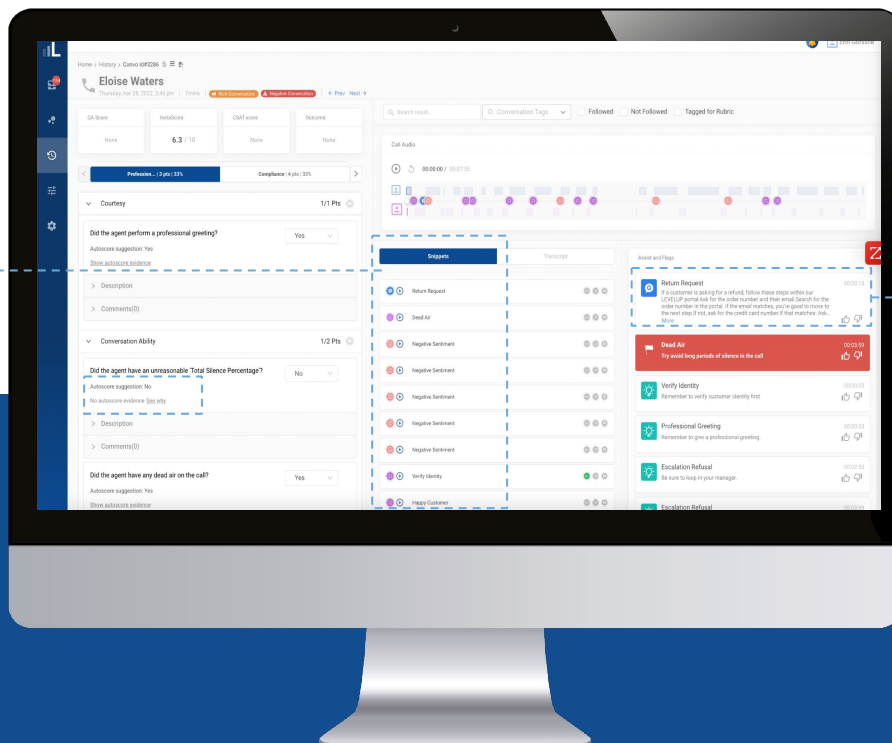
Level AI integrates with Knowledge Base to present real time and post call learning recommendations

# How we are solving for customer experience with Level AI

Flagging the most important interactions to review, coach, and escalate as they happen

**Agent Coaching & Escalation**

- Less time spent on QA, means more time available to spend on coaching
- Coaching plans informed by data trends, no more "you caught me on a bad day"
- Victories celebrated and action plans shared with agents in-platform
- Set up triggers for escalation based on conversation tags

**Compliance**

- Level AI autoflags any non-compliance event
- Visualize my compliance rate over time, click on any conversation with the issue, investigate it
- Add non-compliant moment to agent coaching plan & pinpoint exact moment where issue arose

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# User Workflow: Coaching
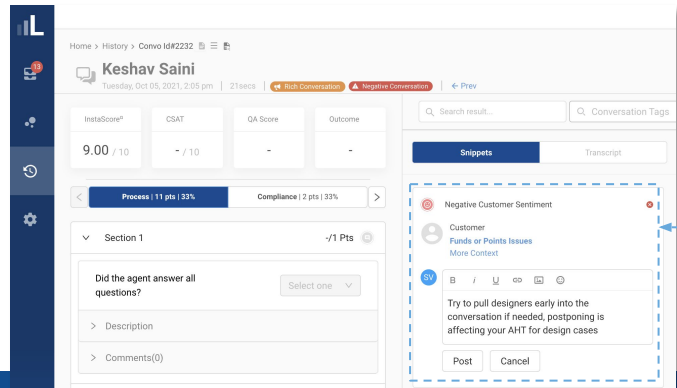


AI identifies areas of underperformance

Recommends interactions that offer improvement opportunities
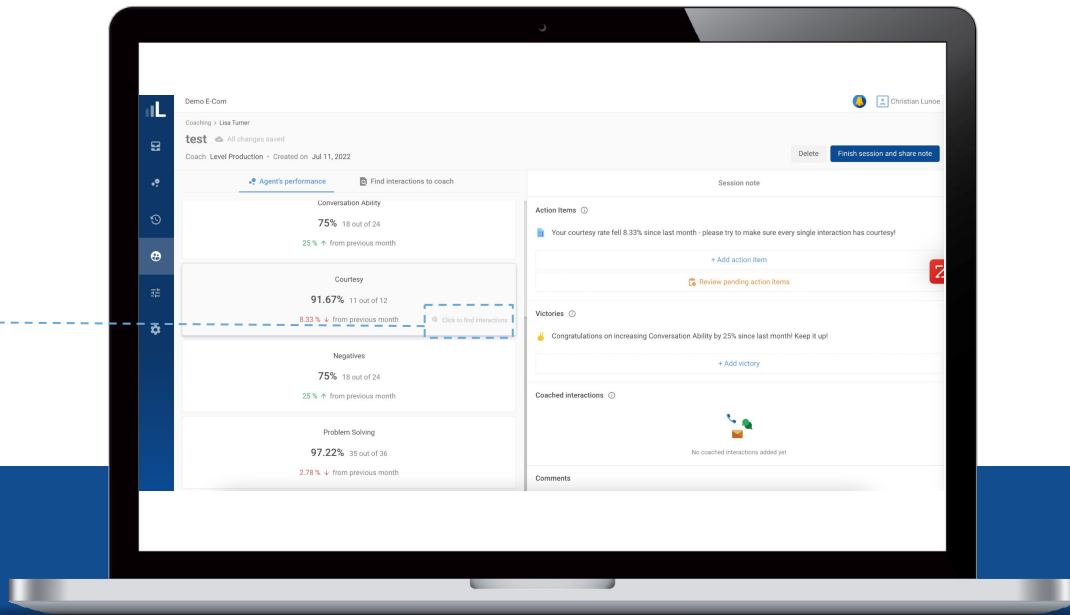
Coaches show specifically where the agent did well or could have done better during the interaction

# How we solved for customer experience with Level AI

Providing deep insight into customer needs, agent behavior and other business opportunities

**Reporting & Analytics**

- Clear and in-depth view of what's going on in our Quality and Care Program
    - Identify drivers into spike of calls (e.g product launches, promotions)
    - Identify what categories or types of calls are trending and which are being resolved efficiently (vs which are not)

- We now make operational improvements based on data.
    - E.g Leveraging sentiment tags we were able to identify which conversation topics were resulting in the greatest volume of frustrated and confrontational sentiment so we could coach agents on these topics further
    - Determine where we have high variance in our QA standards across auditors through calibration and improve standardization

# Business Stakeholder Workflow: Create any report imaginable between the interaction metadata, our AI discovered insights, and your 3rd party data points (CSAT, NPS)

## Generate custom reports using Query Builder

Drill down on your contact center data, mix-and-match parameters, and group variables to uncover meaningful insights.