



Large FinTech Uses Level AI To Ditch Spreadsheets and Manual QA Processes, Resulting in Dramatically Improved Experience for Agents, Q&A Leaders, and Customers Alike

Less time spent manually scoring agent-customer interactions gives QA teams more time to train and coach agents

NUMBER OF AGENTS

2,000

AVERAGE CALL VOLUME

300,000/month

CHANNELS

Phone, chat, email, and secure messaging

PAIN POINTS

- QA processes managed via spreadsheets
- ~1% of calls audited
- Data integration and ingestion issues
- Missed opportunity into deriving insights from the massive amount of unstructured call center data

GOALS

- Increase agent performance by
 - Automating QA processes and,
 - Dedicating more time for agent coaching
- Tap into conversational data for voice of the customer insights

SUCCESS STORIES FOLLOWING IMPLEMENTATION

- Instant insights and analytics into what's driving calls in the contact center
- Auto-scoring of 100% of customer-agent interactions
- More than 15, 000 evaluations in a month
- 30% increase in agent coaching sessions

This US-based fintech company brings in more than \$1.5B of revenue annually, serves more than 14 million consumers and has a customer operations team for 2,000+ agents.

Struggling with inefficient manual processes

Like many organizations, their QA team was relying entirely on manual processes to manage customer service operations. The team used spreadsheets and Google Forms to conduct QA audits, assess agent performance, and track agent training. As a company that received upwards of 300,000 customer calls each month, they were only able to analyze less than a percent of all agent-customer interactions.

Due to these manual processes, entire teams of dedicated QA auditors were tasked with finding and auditing interactions. Unfortunately, this time-consuming approach resulted in weekly training sessions that often lacked vital statistics. Instead of being able to leverage comprehensive data for coaching sessions, team leaders could only reference the few interactions they were given.

Empowering the Customer Service team with Level AI

Seeking a better way forward, they began searching for a more effective method of reviewing team performance, identifying compliance risk at scale and coaching, and growing the customer service team. The right solution would enable them to increase the percentage of audits the team performed each week while reducing the average amount of time each audit took.

After examining a number of different quality management (QM) solutions, they ultimately decided that Level AI was the best option due to its powerful AI-driven conversational intelligence engine and natural language understanding (NLU) capabilities.

“Level AI is the most modern real-time contact center coaching and QA solution out there. We evaluated 11 vendors and Level AI was head and shoulders above everyone based on their NLU approach and comprehensive solution”

Senior Director of Operational Excellence

Additionally, they were drawn to the platform’s omnichannel support, which enabled them to rapidly analyze every agent-customer interaction across voice calls, email, and chat.

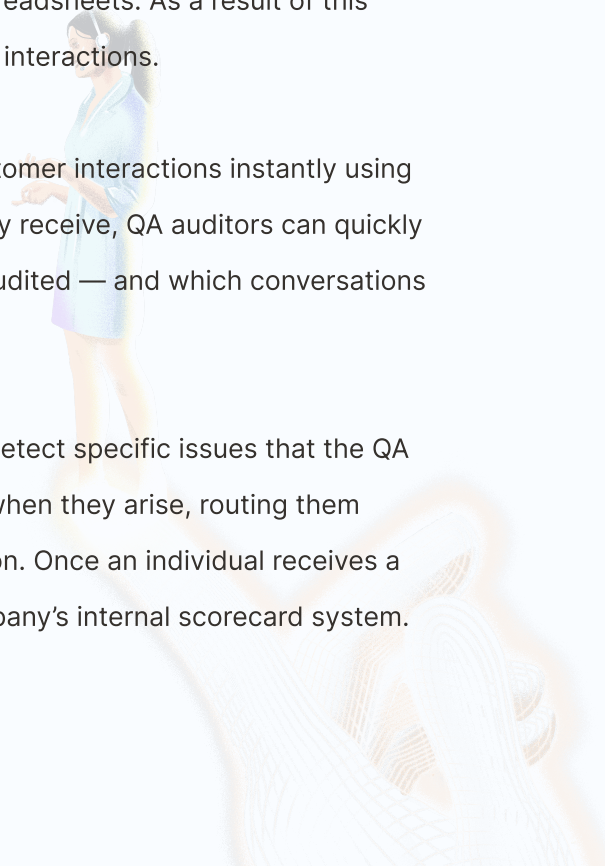
Implementing a powerful, scalable auditing process

As a leading fintech company committed to continuous improvement, they had been using a sophisticated grading system to evaluate agent-customer interactions based on a number of different criteria. Some of these criteria included the channel the interaction occurred on, the team handling the call, the reason for the call, and the overall outcome.

Prior to implementing Level AI, the team would review and grade each interaction manually, one at a time, tracking information on complicated scorecards that lived in spreadsheets. As a result of this unscalable process, QA teams could only grade a small fraction of all interactions.

Thanks to Level AI, the QA team is now able to measure 100% of customer interactions instantly using the platform’s proprietary InstaScore model. Based on the scores they receive, QA auditors can quickly and accurately determine which conversations should be manually audited — and which conversations managers can use to coach agents who need help.

What’s more, they can configure Level AI’s conversational engine to detect specific issues that the QA team is monitoring. The engine automatically surfaces these issues when they arise, routing them directly to the corresponding QA manager without manual intervention. Once an individual receives a notification, they can manually audit the conversation using the company’s internal scorecard system.



Using these InstaScores and other smart filtering tags, auditors can be smarter in sampling the conversations they still want to grade manually using the company's scoring system. And the manual grading process becomes even faster as Level AI's powerful semantic intelligence engine is able to automatically score more than 30% of each manual scorecard.

As a result, they are able to manually review and audit 30% more conversations than they were able to do prior to adopting Level AI. This enables the QA team to better personalize agent training sessions. Plus, with multiple data sources at their disposal, team leaders can accurately identify trends and opportunities for each agent, as well as their strengths.

Level AI allows QA managers to perform their jobs more efficiently by:

- Automatically scoring 100% of agent-customer interactions
- Identifying the most important for manual review and coaching
- Providing QA agents with a queue of interactions to audit
- Recording interaction transcripts, audio, and video
- Providing snippets of noteworthy moments, which allows for faster manual audits
- Redacting personally identifiable information (PII) automatically
- Providing a customizable dashboard and reports on agent performance

"It's so amazing to be able to just take a few minutes at the end of our day to do a health check on each of the agents-in-training, and I know exactly what I need to hit on the next morning as I open my training class and get them ready to take calls."

Senior Manager of Employee Development and Engagement

Giving agents the superpowers they need to reach their full potential

The efficiency and effectiveness gains the company experienced thanks to Level AI were not just felt by QA auditors and managers. The solution also improved the agent experience dramatically.

For example, agents benefit from Level AI's Agent Assist feature, which provides interaction-specific suggestions as a call or written interaction unfolds. Once the interaction is over, the platform summarizes the engagement and syncs that information to the CRM automatically, freeing agents from having to perform the tedious task of inputting that data manually. With one less task on their plates, agents are able to take the next call faster, increasing productivity.

Level AI also enables agents to monitor and improve upon their own performance outside of weekly performance reviews. At the end of each call, interactions are automatically graded; agents can use that information to adjust their behavior accordingly for the next one.

“Having those rich, real-time insights that we’re able to work with from Level AI is so incredibly important — particularly in a remote environment.”

Senior Manager of Employee Development and Engagement

An Auditing Overview

Without Level AI

- Required manual audits
- Auditing process required 4–5 tools
- ~1% of interactions were graded
- Data was often stored in spreadsheets
- Feedback was often delayed
- QA auditors spent half their time selecting calls to audit
- Agents could only see their performance results during meetings

With Level AI

- Optional manual audits
- Auditing process requires 1 tool
- 100% of interactions are graded
- Metrics and data are instantly accessible
Real-time feedback available
- A queue of interactions is provided for QA auditors, reducing wasted time
Agents can see their performance at any time via Level AI

Enhancing the customer experience (CX)

This large fintech company is committed to delivering superior customer experiences in each interaction. In addition to the financial risks they assume, the risk of a dissatisfied customer opting for alternative services is always possible. To maximize customer loyalty and retention, the company aims to ensure that it provides superior CX with both in-house and outsourced operations.

Level AI helps the company accomplish this objective by allowing upper management to pull individual, team, site, and company-wide data they can use to implement changes that enable the entire organization to perform at peak efficiency.



Future-proofing agent effectiveness with Level AI

The company has already seen positive results from using Level AI. Looking ahead, the company anticipates that Level AI will help them streamline the agent onboarding process, enabling new hires to get up to speed faster.

Since Level AI provides agents with live assistance via its Agent Assist feature, new employees are able to spend less time doing systems and knowledge training. Instead, they can focus more on providing personalized customer experiences and using de-escalation tactics to improve each interaction.

With Level AI powering its contact center operations — and continuing to innovate and improve its robust technology offerings — this fintech company will continue to streamline its QA auditing process and optimize its employee training strategies, thereby strengthening the CX across the organization.

