



Client Services | Higher Ed Growth | Simple Health

# A Day in the Life of an Analyst

## Secrets for Success





## A Day in the Life of an Analytics Analyst: Secrets for Success

Interaction analytics can capture thousands of data points from contact center operations every day and produce insights that support contact center operations and overall business objectives in numerous ways. It is the analytics analyst's job to determine how the wealth of available data could be of most value to the organization, then to develop programs to deliver it. Analytics analysts work with contact center managers, agents, business unit leaders and senior executives to determine what to measure with analytics. They are then responsible for determining how to measure the desired activity and behavior, and how to report, interpret and apply the results.



CallMiner hosted an online discussion among contact center analytics analysts from three companies: Simple Health, Client Services and Higher Ed Growth. These analysts discussed how to establish and manage programs interaction analytics programs to support business goals. Here we present an overview of each program and some takeaways that others could learn to make their own efforts more successful. You can listen to the complete discussion [here](#).

### Industry

Healthcare Insurance  
Collections  
Higher Education

### Business Value

Customer Experience  
Call center Efficiency  
Performance Management  
Sales Effectiveness

### Objectives

- Improve customer experience and satisfaction
- Reduce agent monitoring and coaching time
- Reduce contact review time
- Set targets for individual agents

### Solutions

- ✓ CallMiner Eureka Interaction Analytics

### Results

- ✓ Reduced individual agent coaching time by 75%
- ✓ Increased number of agents able to coach each week by 700%
- ✓ Surpasses 95 percent quality rating for call handling
- ✓ Track compliance in performance targets at the agent level

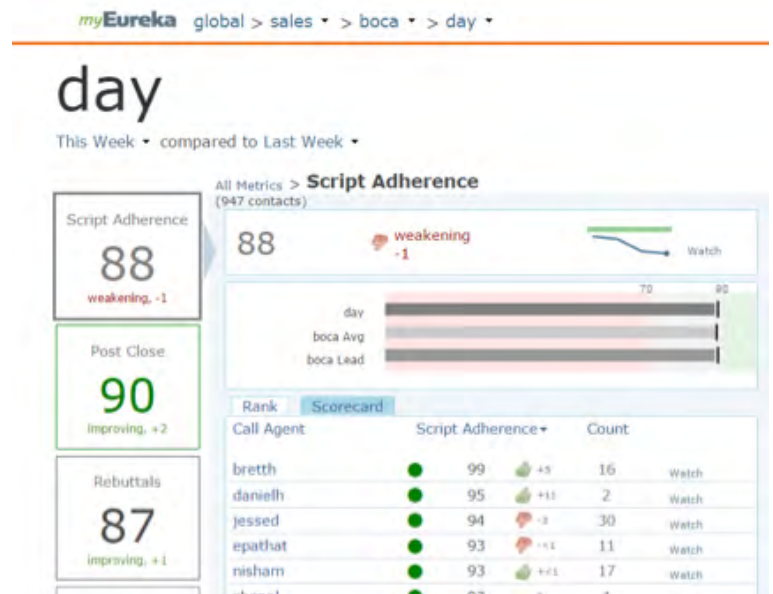
# Simple Health

Simple Health is a full service health insurance brokerage. It quickly grew from operating four call centers with 170 agents, six managers and no quality assurance (QA) department to seven call centers, 410 agents plus an established and growing QA staff. Simple Health implemented the CallMiner Eureka interactive analytics solution as part of its effort to create a dedicated quality assurance organization. One of the main goals for using interaction analytics was to improve the ability to monitor and train new agents. Simple Health was especially interested in tracking how closely all agents followed its carefully developed scripts, and how they responded to sales objections.

Within six months of the implementation Simple Health was able to reduce the average time required for a coaching session from 40 minutes to 10 minutes. The reduction was mostly because of the time supervisors saved from having calls automatically monitored and scored, because CallMiner Eureka does it automatically for 100 percent of contacts. The time savings enables Simple Health provide coaching for approximately 80 percent of its agents each week, when previously only 10 percent could receive extra help. Agents have become more effective, as the average sales closing rate has improved by 5 percent and there was a large reduction in policy cancellations.

Here are some of what Business Intelligent Analyst Scott Ramirez considers the keys to the program's success:

- ✓ Appoint and empower a project champion. Ramirez was hired to implement the analytics program at Simple Health. "I think that the fact that I was hired early in the process was very important to our success," he said. An alternative to hiring from the outside would be to promote an employee to the position. The keys are to identify a program champion and to give that person the authority to match the responsibility.
- ✓ Budget time to promote the system. Ramirez spent time meeting with various stakeholders to learn about their needs. He also spent time educating them about what interactive analytics could monitor and the types of reports and data it could produce. That helped the program win acceptance and led managers to act on the data they received. "Even perfectly crafted scorecards do nothing if the front line isn't acting on them," Ramirez said.
- ✓ Get an early win. "Go the extra mile so that the first searches and scorecards you create are especially pristine. That will enhance your credibility with stakeholders right away."
- ✓ Be selective about reporting. "Managers want reports that are simple and to the point so they know what needs to be addressed right away. They don't want to be bogged down by a lot of numbers. Interaction analytics is really flexible in what it can measure and can provide many nuggets of information, so I caution against the temptation to investigate and report anything and everything."



## Client Services

---

Client Services is a third-party collections agency that proudly has more than 30 years of experience, numerous industry certifications and an A+ rating from the Better Business Bureau. The organization values quality and relies heavily on interaction analytics to support its QA efforts. Client Services has 852 call center employees, including 49 supervisors and 24 quality assurance staff members. It uses CallMiner Eureka to regularly produce 23 standard reports for various stakeholders (agents, supervisors, executives, et al). Client Services regularly surpasses a 95 percent quality rating for call handling, which exceeds client expectations.

Kim Berghold leads Quality Assurance for Client Services and is responsible for getting the most out of the interactive analytics solution to help the company meet its client deliverables. Berghold said analytics has given the company a competitive advantage. Here are some of the ways:

- ✓ **Ask & Listen:** “I was intrigued by interaction analytics and what we could do if we gave it proper attention. I also had a lot of questions about where to start and how I could be most effective,” said Berghold. “A big part of my job in the beginning was meeting with different managers and asking a lot of questions.” She credits the process for allowing her to measure the behaviors and create the reports that are most useful for helping Client Services meet its business objectives.

- ✓ **POLICE your operations.** Berghold developed an acronym to reinforce the best process for developing and using interactive analytics scorecards:

- o Prioritize
- o Organize
- o Listen
- o Investigate
- o Communicate
- o Evaluate



- ✓ **Collaborate broadly.** Con ics team don't dictate what will be measured and reported. Call center managers, business unit leaders and clients are all involved in identifying areas for improvement and how interactive analytics could help. Berghold then designs the metrics and reports to support the business goals.
- ✓ **Test and revise:** Every time Client Services makes a change to one of its analytics reports, it conducts an analysis to see if the pre-change or post-change version of the report is better for producing the desired information or supporting the desired business outcome.

## Higher Ed Growth

---

Higher Ed Growth helps connect students with schools by providing lead generation services for colleges and universities. It has 1,500 contact center agents that are supported by 10 supervisors and coaches and a QA staff of 20. It began using interactive analytics so it could reduce its manual call recording review time, which would allow the organization to review more calls. Higher Ed Growth believed that by monitoring and coaching more thoroughly, it could improve its compliance rate and get more insight into overall contact center operations and individual agent performance. Quality Assurance Manager Ed Paetz provided insight into how using interaction analytics helped the organization meet those goals.

- ✓ **Carefully create KPIs:** Higher Ed Growth wanted to improve several aspects of its operations. It put a lot of effort into determining how its specific business issues could translate into key performance indicators (KPIs) that it could measure with interactive analytics. Spending the time on this important step helped the analytics solution provide the insight Higher Ed Growth needed. It also helped guide development of scorecards that accurately and fairly reflect individual agent performance.

“Before interactive analytics we couldn’t track compliance by individual agents,” Paetz said. Now Higher Ed Growth can not only track compliance and other performance metrics to the agent level, it has the data to set reasonable performance targets and can better coach agents to achieve them.



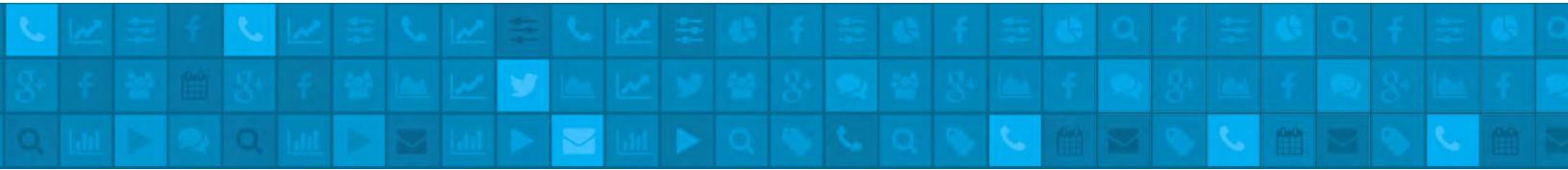
- ✓ **Apply what is learned.** As Higher Ed Growth collects more data and insight from its calls, it frequently adjusts its monitoring and scoring. “Whenever we learn of something that should not be occurring on calls, we will design a new search for it,” Paetz said. “That way we can regularly improve quality and potentially prevent future problems.”
- ✓ **Balance customization and optimization.** Higher Ed Growth has specific scorecards for each client that are based on the client’s goals and priorities. However, the analytics team constantly looks for opportunities to apply learnings from one client to others. For example, if a violation occurs on one account, Higher Ed Growth will build safeguards against similar violations into the monitoring program for all its accounts.

This has been a small sampling of advice and lessons learned from three successful contact center managers. Visit the CallMiner Learning Center (<http://callminer.com/learning-center/>) for webinars, white papers, videos and other resources that present other best practices, advice and background information on interaction analytics.

# CallMiner® Eureka

Listen to your customers. Improve your business.™

©2017 by CallMiner. All rights reserved.



 (781) 547-5690

 [www.callminer.com](http://www.callminer.com)

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

 [facebook.com/callminerinc](https://facebook.com/callminerinc)

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

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

 [www.engagementoptimization.com](http://www.engagementoptimization.com)