

# How agents are going to save the (Customer Service) world: trends and technology

ED CREASEY

CALABRIO LTD.

# Introduction and Agenda

# Introduction



- **28 years in Contact Centres, 20 years in CX software & consulting**



**Headquartered in Minneapolis, MN**  
600+ employees  
5,800 customers worldwide



**Fully integrated Workforce Engagement Management suite**  
Analytics, Advanced Reporting, Workforce Management and Quality Management



**Recognized leader & top customer ratings**



**200+ partners globally; Leading CCaaS partnerships**



**Global company with 7+ offices around the world**



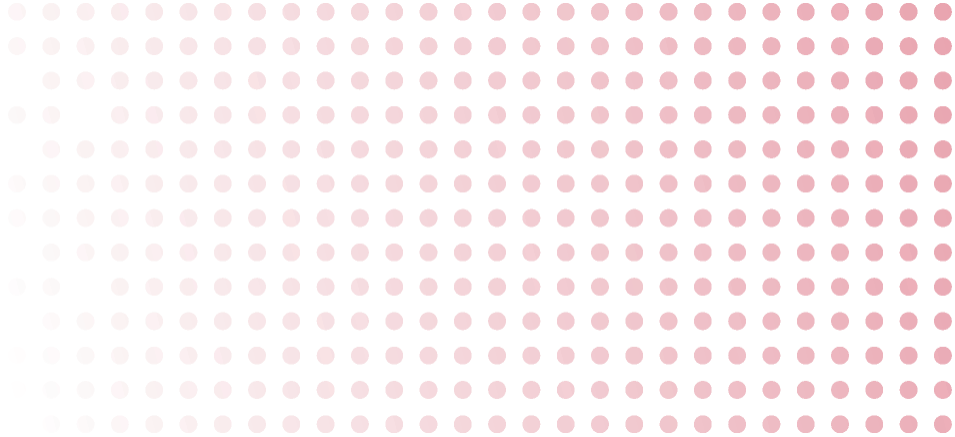
**6x Winner:**  
Top Workplace—Minnesota  
**5x Winner:**  
Great Place to Work—Sweden

# Agenda

1. Why we need to really understand the modern workforce

2. The negative trends to look out for

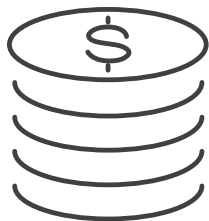
3. How new technology will support employees



**Do we really understand  
the modern workforce?**

# Why should we engage with employees?

Engaged and satisfied contact-center employees drive:



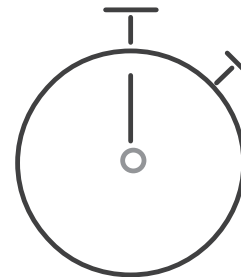
## More Revenue

- **5%** increase in engagement  
= **3%** increase in revenue



## Lower Churn

- **8.5x** more likely to stay than leave within a year
- **4x** more likely to stay than dissatisfied colleagues



## Higher Productivity

- **3.3x** more likely to feel extremely empowered
- **17%** higher productivity from engaged staff

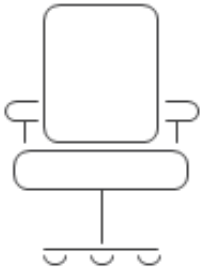
**85%** of adults *worldwide* are not engaged or are actively disengaged

# Negative Trends for Engagement

What to watch out for

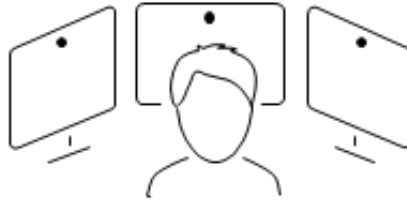
# What behaviours to look out for with Negative Engagement

Absenteeism



Not valuing our  
staff

Missing SLAs



Poor shift  
adherence /  
visibility

Low CSAT /  
Quality




Low engagement  
in Quality  
programs





# Absenteeism: Employees aren't feeling valued.

- Explain the impact on other employees
- Understand the causes of stress
- Ensure your policies and tools are flexible enough

- 
- A black and white photograph of two men in suits and glasses. The man on the left is holding a large clipboard and looking at it intently. The man on the right is looking at the same clipboard. They appear to be in a technical or industrial environment, possibly a control room or a factory floor, with various cables and equipment visible in the background.
- Is there a correlation between low-adherence and engagement?
  - Are your schedules meeting the team's needs?

**Missing SLAs: Low shift adherence, missed service levels**



## Poor Quality, low NPS/CSAT

- Are these programs fair?
- Are they connected to KPIs?
- Are employees engaged in the process?

# Engagement 2.0

How new technology  
will transform your  
digital landscape

An organisation's capacity for growth is tied to the experiences of its employees



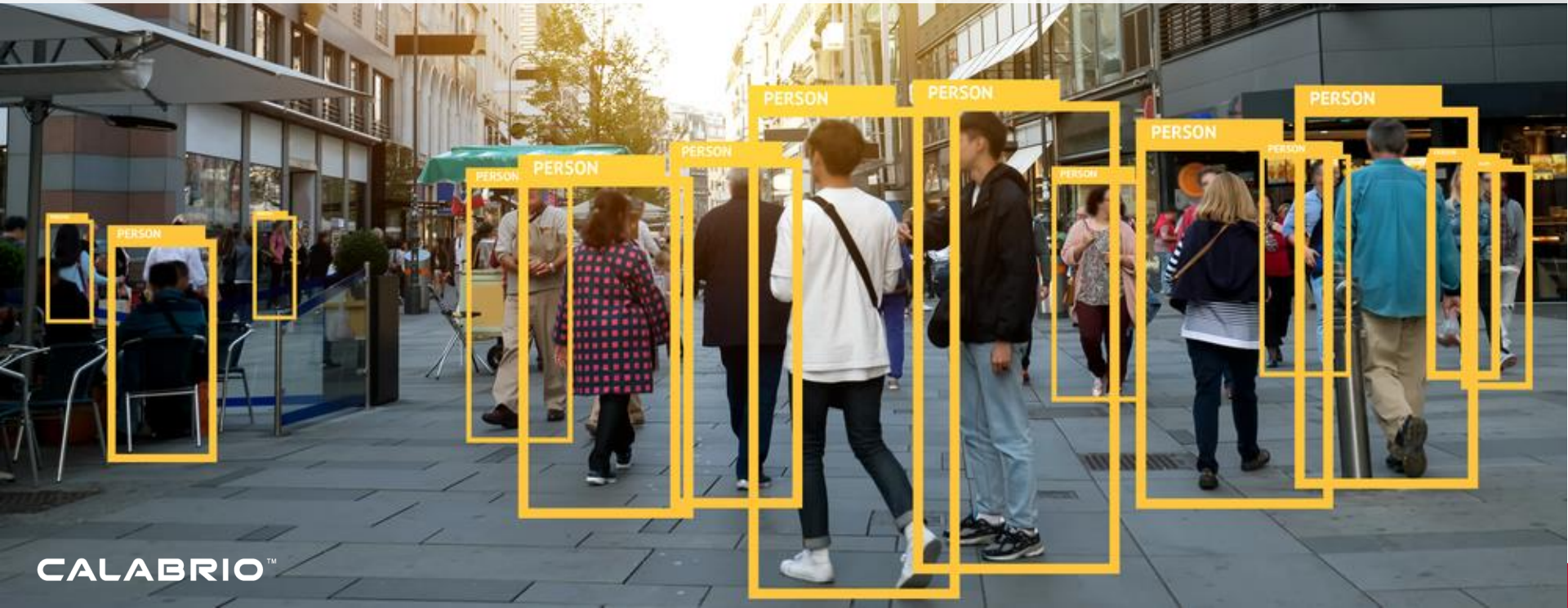
Work  
Life  
Balance



Meaning  
and  
Growth

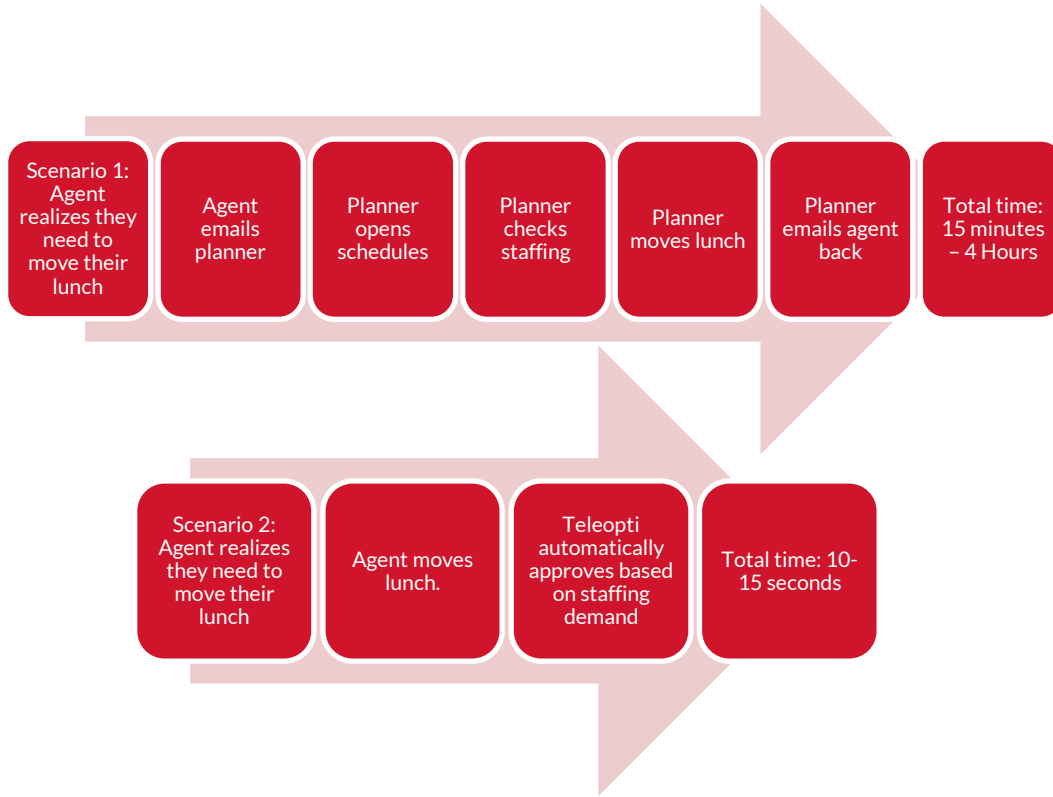
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# Work/Life Balance

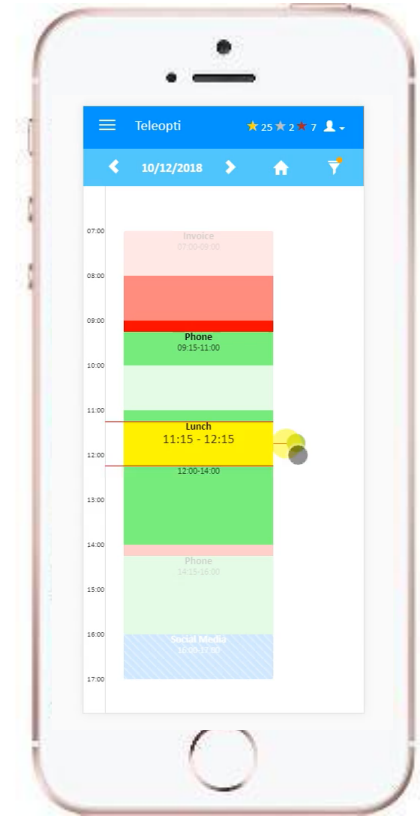


# Self-scheduling

Increase Employee empowerment and decrease administration



Increased autonomy. Reduced Admin.

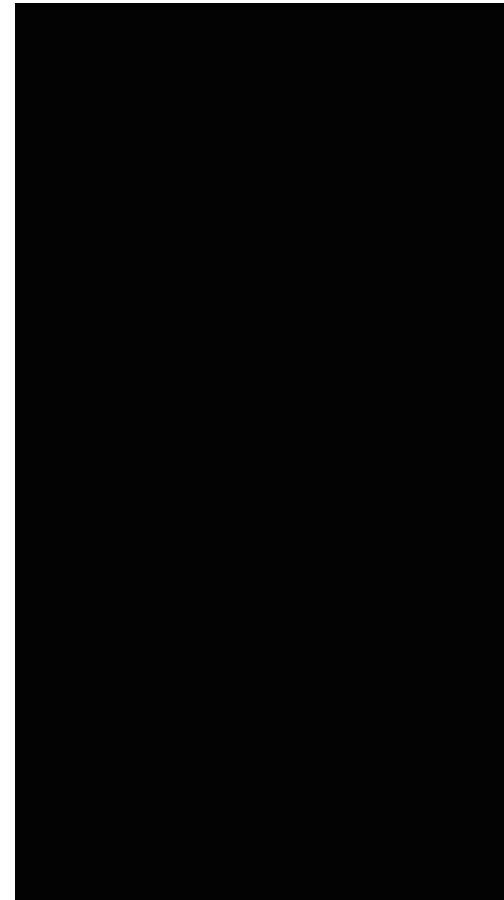


# Self-service: Overtime requests

More flexibility and automation of routine tasks

- Planners “run around begging for agents”
- Overtime requirement automatically identified in forecast v scheduled
- Present overtime options to agents in web/app
- Automates the whole process end to end

Happy planners, happy agents





# Preference based scheduling

Fairness built into scheduling

- Employees request the shifts / days off they want
- All submitted at the same time
- Management controls what % can be fulfilled
- Doesn't penalize positive behaviour

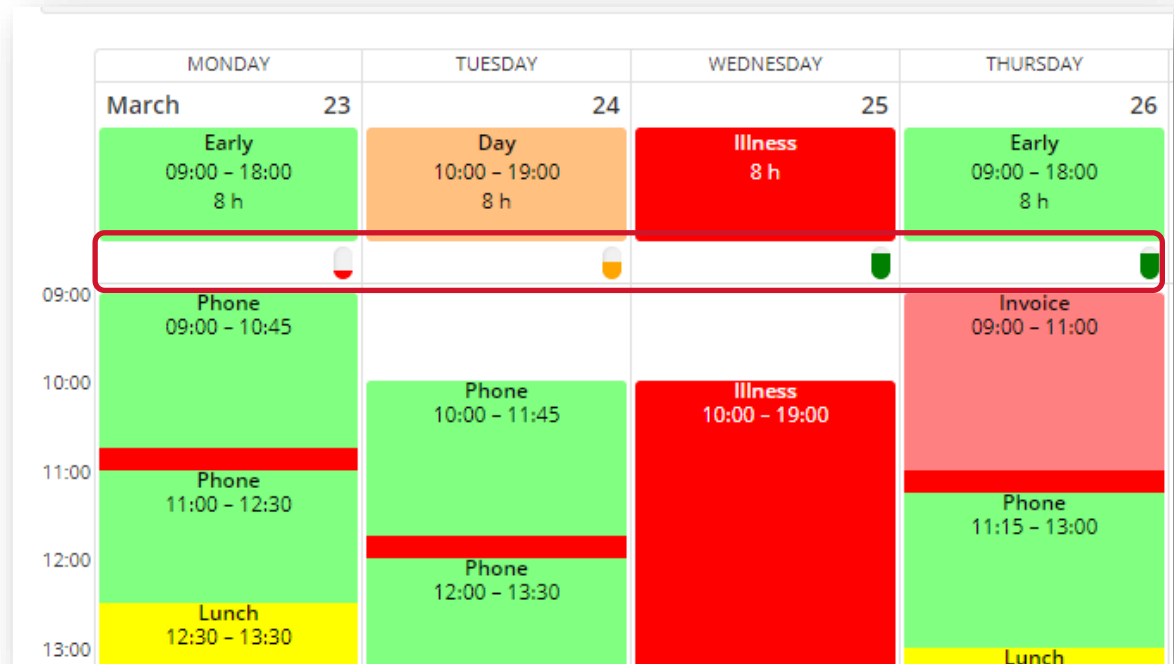
Empowerment with fairness

Screenshot of a preference-based scheduling software interface. The interface shows a navigation bar with 'Schedule', 'Team Schedule', 'Availability', 'Preferences', 'Requests', and 'Messages 106'. Below the navigation bar, there are filters for dates (03/02/2020 - 09/02/2020), a 'Preference' button, a 'Remove' button, and a 'Must have 0 (4)' dropdown. A dropdown menu is open, showing 'Shift category' with options: Day (orange), Early (green), Late (blue), and Day Off (grey). Below the dropdown, a purple banner displays a warning: 'You should have 2 days on: your preferences can result in 2 days off. Preference period: 18/07/2016 - 01/09/2020 | Is open: 01/12/2015 - 31/12/2020'. At the bottom, a calendar grid shows dates from Monday 27 to Friday 31, with 'Early 07:00 - 16:00 8 h' listed for each day.

# Absence Request and Probability

Giving agents the confidence to book absences

- Agents want confidence when booking leave
- Icons show the probability of getting leave approved
- Planners can control Service Levels using rules



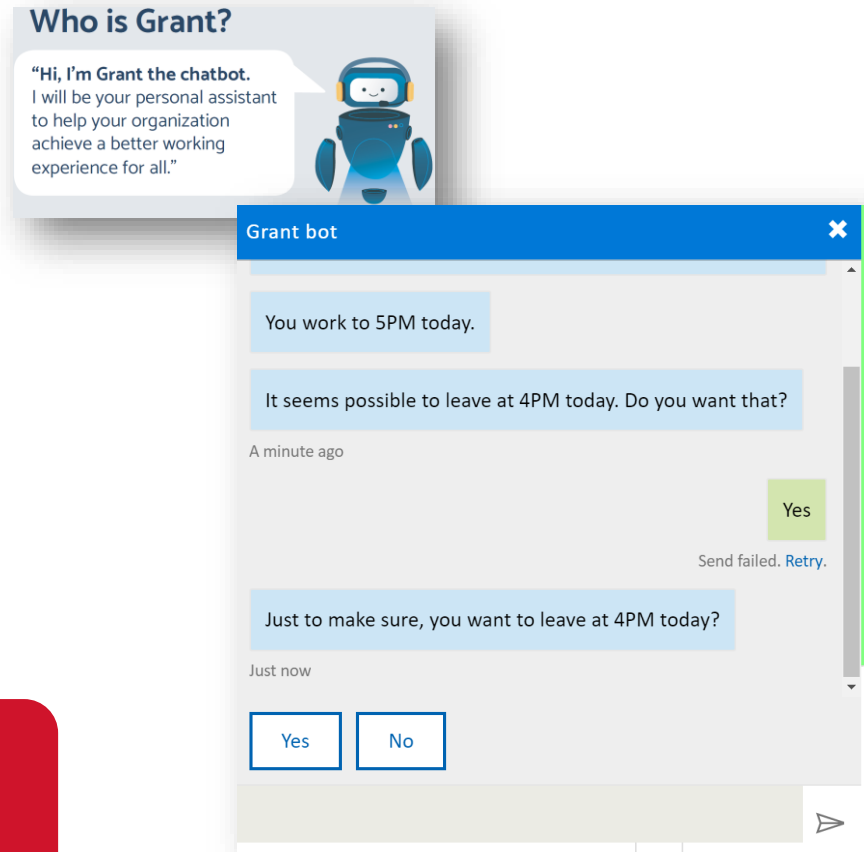
Flexibility without affecting  
Customer service levels

# Grant – the Employee's Personal Assistant

AI powered, virtual assistant for employees

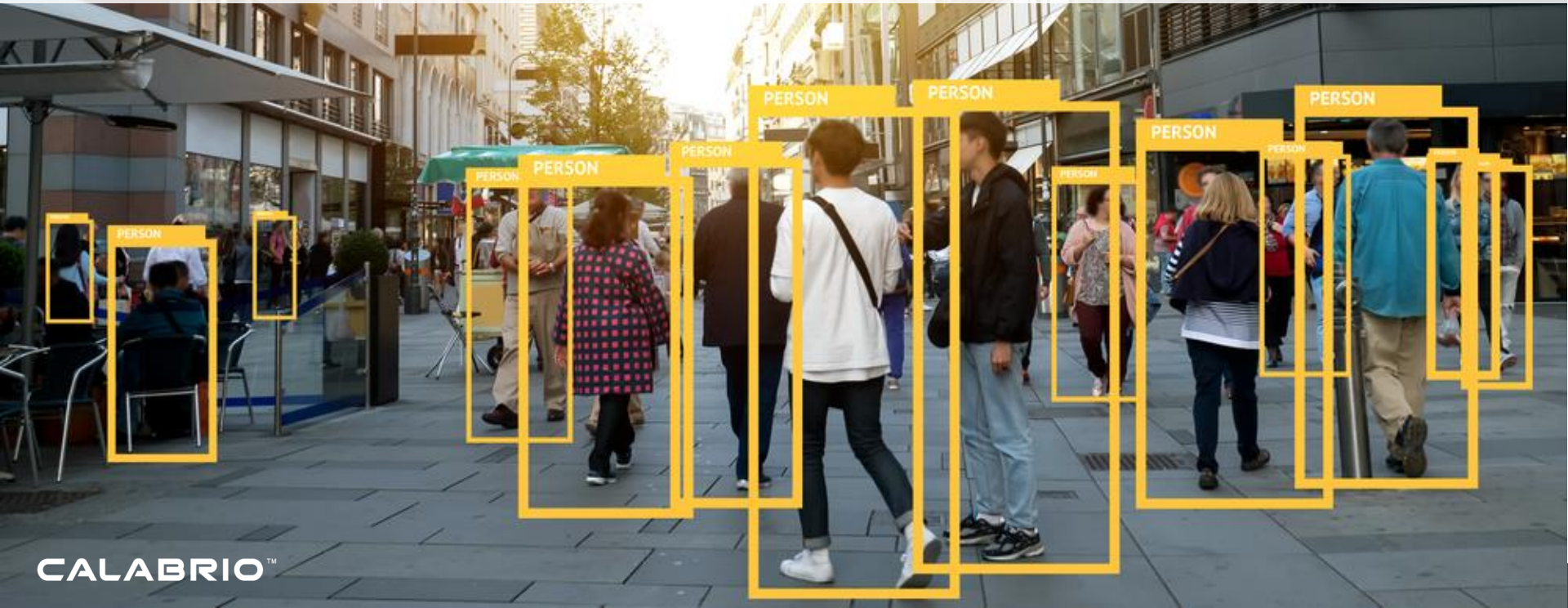
- A personal concierge for self-service
- Gives recommendations proactively
- Self-service intraday automation
- Allows planners to focus on the big picture
- Reduces mundane tasks

**Employees feel empowered and the contact centre closes staffing gaps.**



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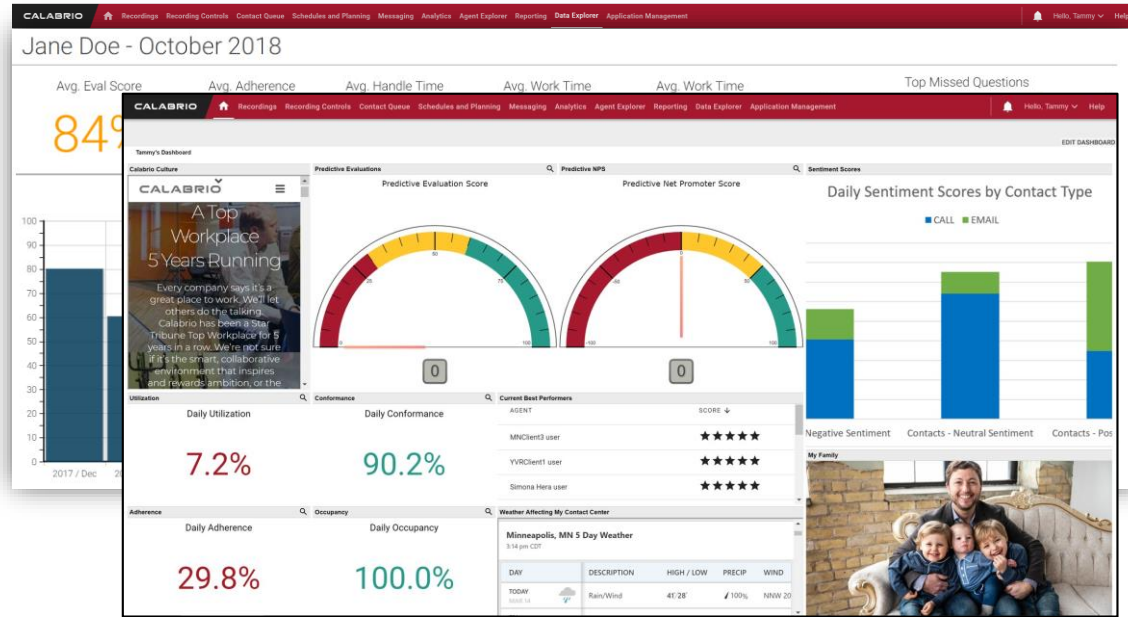
# Engagement: Meaning and Growth



# Empower Employees with Self-Service Dashboards

Provide End Users with a single view of the truth

- Single portal that simplifies training
- Bings together all employee data
- End users self-serve and drill down to root cause
- Consistent yet personalised learning
- Simple, Usable reports across all data sources



Empower employees to understand and improve their performance

# Supporting Growth: Bringing Together All Data

Metadata, Transcription, Sentiment, Screen Recording and Quality all in One Place

The screenshot displays the Calabrio interface with several key components:

- Agent Profile Card (Left):** Shows agent details for Katelyn Owens (Level 1 Support Agent) and performance metrics for the last 30 days: Net Reputation Score (90), Average Predictive NPS (8.76), and Completed Customer Interactions (726).
- Transcription Panel (Center):** Displays a call transcript with timestamps and sentiment indicators. Sentences include: "hello i mean thank you for calling sienna creek where your business is our business how can i help you", "i'm up and push buttons in your waiting for an hour what i want to speak to someone about my account whole day", "ok mr cooper again i am very sorry let me access your account now mr cooper can i put you on hold one moment", "yeah that's fine guy friend", and "okay miss mister cooper i do apologize i am having difficulty finding your account activity would you mind if i transferred you to another more senior experience".
- Screen Capture (Right):** Shows a desktop recording of the agent's screen during the call.
- Evaluation Panel (Bottom Right):** Displays a "SCORED SECTION" with a "Section Score 100" and evaluation questions such as "1.1 How well did they handle the call?" and "1.2 Explain why".

Agent Profile Card provides at-a-glance stats on the agent for a more holistic view of the interaction

Synchronized, vertical scrolling of all interaction data during play back, including screen recording, provides deeper insight into each interaction

One-stop-shop media player provides holistic view and ensures an efficient evaluation process

Embedded AI-fueled analytics\* - transcription, sentiment, speech, desktop, text - along with call data

Choose from a library of customized evaluations

# Increasing Fairness with Predictive QA & VoC

Using Machine Learning and AI to extend Quality and Voice of the Customer across 100% Interactions

- Quality Management assesses <2% of interactions
- Customer survey rates are declining, respondents are often extreme
- Score 100% of interactions and predict good and bad
- Select relevant interactions for CX processes

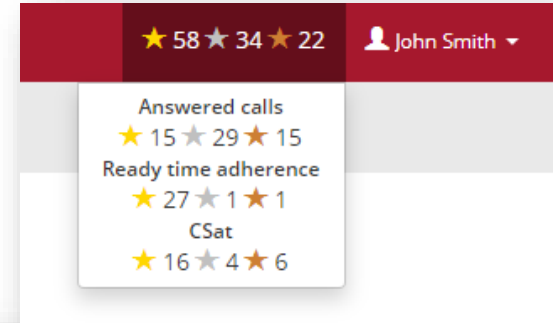


100% Benchmarking = more accurate insights, better coaching and smarter decision-making.

# Using Game Mechanics to Engage ALL agents

Gamification to engage agents in competitive and collaborative quests

- Gamification is all about making tasks enjoyable
- Moving from extrinsic to intrinsic motivation in employees
- Focus on all KPIS that are important to customers (VOC, Quality, Adherence)
- Use different quests for different personalities



Rank	Agent Name			
1	John Smith	54	53	19
2	Jon Kleinsmith	51	33	31
3	Stephen Bay	40	27	26

Game mechanics can drive performance for all personality types



# Simplify your Employee Engagement tools. Automate. Analyse. Engage



Calabrio  
Analytics



Advanced  
Reporting



Workforce  
Management



Quality  
Management



Call  
Recording



# Thank You

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**Come and see us at our  
stand to see more about  
Employee Engagement**