



# Call center analytics

## Dental implant provider

Partnered with call center operations and analyzed the agent performance metrics, impact of historical strategic initiatives, and further built robust strategic plans for 2022 (such as call center forecasting and bonus plan) to increase lead conversion and agent retention

# Dental implant provider needs a cutting-edge agent performance analytics

## Picture this...

You're looking for call center operations to analyze the agent performance metrics, \$ impact of historical strategic initiatives, and further built robust strategic plans to increase lead conversion and agent retention. Currently, you have limited visibility into the impact of these initiatives on agents' performance, revenues, and profitability.

## You turn to Accordion.

We partner with your team to analyze the agent performance metrics, impact of historical strategic initiatives, and further built robust strategic plans (such as call center forecasting and bonus plan) to increase lead conversion and agent retention, including:

- 1) Building customized Excel dashboards for different stakeholders to measure the performance and productivity of the call center agents and a comprehensive bonus plan that integrates individual agents' performance across the campaigns
- 2) Analyzing the historical performance of call center operations and identified isolated time periods for overlapping strategies to estimate the impact on financials (revenue upside, ROI, etc.) and growth (patient leads conversion, agents' productivity, etc.), for each strategic initiative
- 3) Building a call volume forecasting model to understand the future demand and created a call center scheduling tool by integrating volume forecast, agents' performance, and productivity metrics to improve conversion rate

## Your value is enhanced.

You have better visibility into agents' performance and productivity, to design personalized training & coaching strategy for individual agents. You understand the impact of historical growth strategies that can help better plan the future strategic efforts for call center operations. You also have call volume forecasting providing details on the agent hiring process, agent scheduling in prioritize call routings to top-performers and customized the bonus plan for improved retention.

### CALL CENTER ANALYTICS

#### KEY RESULT

- Impact 1...
- Impact 2...

#### VALUE LEVERS PULLED

- Excel dashboards
- Customized training and coaching strategy
- Call volume forecasting
- Agent scheduling
- Customized bonus plan

# Call center analytics for a dental implant provider

## Situation

- Client undertook various overlapping strategic initiatives such as IVR routing, compensation plans, etc. to drive growth in the call center operations. However, the client had limited visibility into the impact of these initiatives on agents' performance, revenues, and profitability.
- Partnered with the client to support the call center operations and analyze the agent performance metrics, \$ impact of historical strategic initiatives, and further built robust strategic plans for 2022 (such as call center forecasting and bonus plan) to increase lead conversion and agent retention

## Accordion Value Add

- Built customized Excel dashboards for different stakeholders to measure the performance and productivity of the call center agents and built a comprehensive bonus plan that integrates individual agents' performance across the campaigns
- Analyzed the historical performance of call center operations and identified isolated time periods for overlapping strategies in order to estimate the impact on financials (revenue upside, ROI, etc.) and growth (patient leads conversion, agents' productivity, etc.), for each strategic initiative
- Built a call volume forecasting model to understand the future demand and created a call center scheduling tool by integrating volume forecast, agents' performance, and productivity metrics to improve conversion rate

## Impact

- Management team now has better visibility into agents' performance and productivity, that helped the team design personalized training & coaching strategy for individual agents
- Ability to understand the impact of historical growth strategies that helped better plan the future strategic efforts for call center operations
- Call volume forecasting helped with the agent hiring process and agent scheduling helped prioritize call routings to top-performers and customize the bonus plan for improved retention

# Analytics solutions for call center operations

## CALL CENTER VOLUME FORECASTING AND AGENT SCHEDULING

- **Built call volume forecasting tool**, using machine learning algorithms, based on historical datasets normalized for promotions & marketing, seasonality, and non-recurring events; Adjusted the forecast for future strategic initiatives, promotions, and consults capacity
- Generated a **consolidated forecast** at sales, service or support calls level and weekly & monthly level. This forecasting tool **helped the client with the agent hiring process** to better manage call center operations
- **Created a call center scheduling tool** by integrating volume forecast, agents' performance, and productivity metrics to get better conversion rate. This helped the client in **prioritizing call routings to top-performers and investing in top talents for improved retention**.

## PERFORMANCE AND PRODUCTIVITY REPORTING

- Built **comprehensive reporting suite**, customized for various stakeholders, that track KPIs to **measure the performance and productivity of the call center agents** on daily, weekly and monthly basis
- Provided the management team with **individual agents' performance and productivity reports** that are being leveraged in one-to-one performance evaluation meeting to **inform personalized training & coaching strategy**
- **Benchmarked** the individual agent against the productivity and performance KPIs to **identify the agents that are frequently performing below the benchmarks** so that the management team can take necessary action

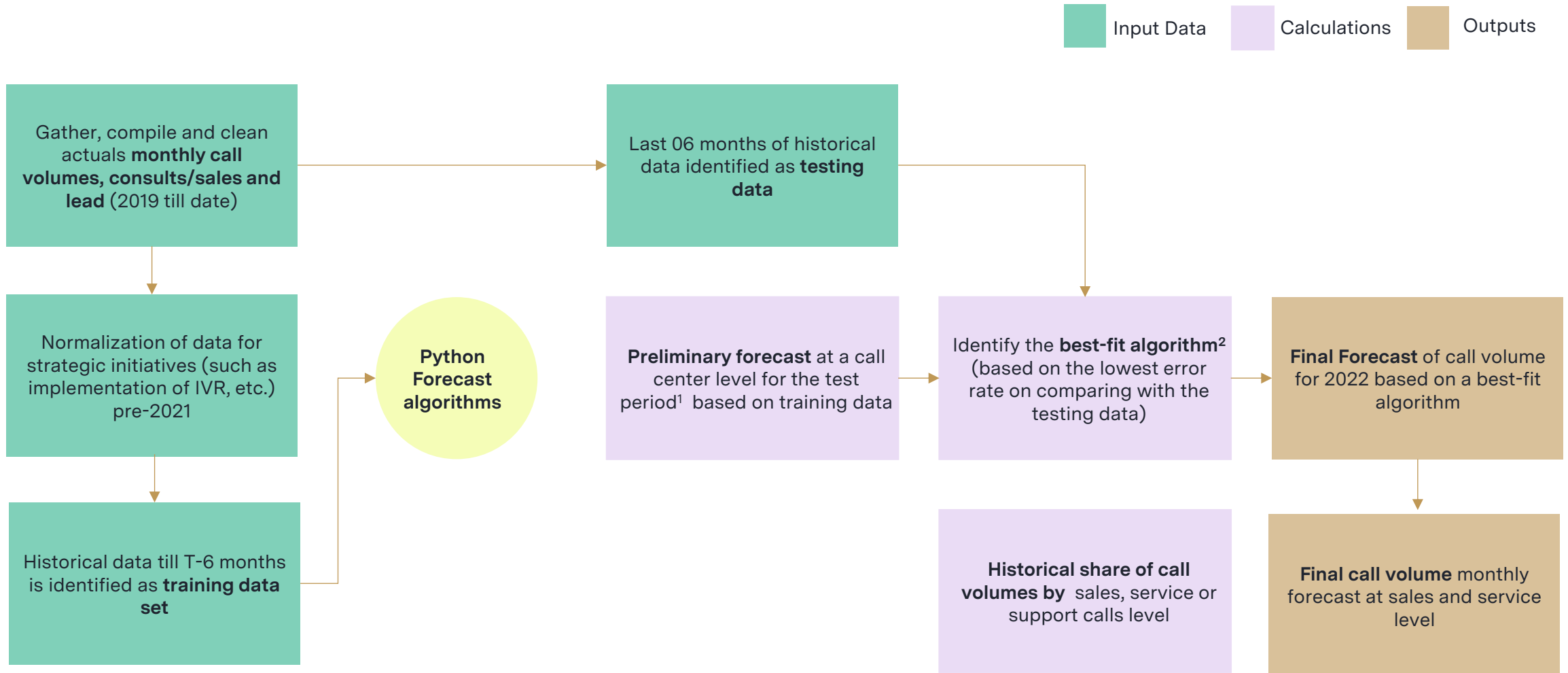
## COMPREHENSIVE BONUS SUITE

- **Built a comprehensive bonus plan** for different hierarchical levels such as agents, team leaders, and support team. The bonus plan integrates individual agents' performance in different future campaigns for increased patient lead conversion and higher retention
- Performed **sensitivity analysis** on the bonus payout scale to estimate **financial (such as revenue upside, ROI) and growth (patient leads conversion, agents' performance, etc.) impact** of each strategic initiative

## IMPACT OF STRATEGIC GROWTH INITIATIVES

- **Analyzed the impact of various overlapping strategic initiatives** such as IVR routing, new compensation plan, digital marketing, etc., client undertook to drive growth in the call center operations
- As part of this, **identified isolated time periods** for overlapping strategies in order to estimate the accurate financial (such as revenue upside, ROI) and growth (patient leads conversion, agents' performance, etc.) impact of each strategic initiative

# Methodology for call center volume forecasting



1. Includes 06 months where we have the actual data in order to back-test the forecast results

2. Algorithm considered include ARIMA, SRIMA, Simple Exponential Smoothing and FB Prophet. Best-fit algorithm (for planning sub brand) is identified based on the Forecast error from each algorithm

# Agent scheduling

## Notes:

1. Tier 1 "Prime": Time slot with maximum ib call volume
2. Tier 2 "Midday": Time slot with average ib call volume
3. Tier 3 "Off Prime": Time slot with minimum ib call volume
4. Sales continued: Sales agents with atleast 2 full months data from Jan'22 to Mar'22
5. Sales new: Sales agents with less than 2 full months data from Jan'22 to Mar'22

Scheduling Month  >> based on Jan'22 to Mar'22

Number of agents	
Sales Continued	42
Sales New	9
Service	15
Total	66

Cell legend

Number of agents in each tier (%)			
	Tier 1 "Prime"	Tier 2 "Midday"	Tier 3 "Off Prime"
Sales continued	25	50	25
Sales new joiners	25	50	25
Service	30	50	20

Number of agents in each tier			
	Tier 1 "Prime"	Tier 2 "Midday"	Tier 3 "Off Prime"
Sales continued	11	21	10
Sales new joiners	2	5	2
Service	5	8	2

Agents in tiers based on IB consult rate								
Tier 1 "Prime"			Tier 2 "Midday"			Tier 3 "Off Prime"		
Sales Continued	Sales New	Service	Sales Continued	Sales New	Service	Sales Continued	Sales New	Service
Agent_8	Agent_61	Agent_28	Agent_10	Agent_32	Agent_49	Agent_35	Agent_65	Agent_55
Agent_1	Agent_39	Agent_47	Agent_4	Agent_64	Agent_52	Agent_17	Agent_66	Agent_60
Agent_2		Agent_57	Agent_14	Agent_26	Agent_54	Agent_43		
Agent_27		Agent_53	Agent_13	Agent_63	Agent_51	Agent_29		
Agent_9		Agent_45	Agent_12	Agent_62	Agent_50	Agent_34		
Agent_7			Agent_22		Agent_56	Agent_41		
Agent_6			Agent_19		Agent_59	Agent_23		
Agent_5			Agent_38		Agent_58	Agent_40		
Agent_3			Agent_31			Agent_30		
Agent_16			Agent_15			Agent_21		
Agent_24			Agent_36					
			Agent_46					
			Agent_44					
			Agent_48					
			Agent_37					
			Agent_20					
			Agent_42					
			Agent_33					
			Agent_18					
			Agent_25					
			Agent_11					

Recommendation of schedule based on the performance and shift requirements

Agent performance metrics and ranking used for shift recommendation

Agent	Supervisor	Agent Type	Joining date	3-months Average IB consult rate	3-months Performance		3 months Avg. Final Points	Current Schedule Classification	Recommended Schedule Classification
					Ranking				
Agent_38	Supervisor_1	Sales continued	10/4/2021	20.1%	20		50.1	Tier 2 "Midday"	Tier 2 "Midday"
Agent_30	Supervisor_2	Sales continued	6/16/2020	14.4%	49		63.4	Tier 3 "Off Prime"	Tier 3 "Off Prime"
Agent_2	Supervisor_1	Sales continued	4/24/2021	24.3%	3		133.8	Tier 1 "Prime"	Tier 1 "Prime"
Agent_50	Supervisor_3	Service	11/13/2017	7.3%	58	Not Available		Tier 1 "Prime"	Tier 1 "Prime"
Agent_61	Supervisor_4	Sales new	3/23/2022	22.3%	10	Not Available		Tier 3 "Off Prime"	Tier 2 "Midday"
Agent_57	Supervisor_3	Service	2/16/2020	11.9%	51	Not Available		Tier 2 "Midday"	Tier 1 "Prime"
Agent_3	Supervisor_5	Sales continued	2/14/2020	22.5%	9		130.1	Tier 1 "Prime"	Tier 3 "Off Prime"
Agent_1	Supervisor_5	Sales continued	7/26/2021	24.3%	2		94.3	Tier 3 "Off Prime"	Tier 2 "Midday"
Agent_23	Supervisor_5	Sales continued	10/4/2021	16.0%	45		56.9	Tier 2 "Midday"	Tier 2 "Midday"
Agent_65	Supervisor_2	Sales new	4/24/2022	0.5%	65	Not Available		Tier 3 "Off Prime"	Tier 2 "Midday"
Agent_20	Supervisor_5	Sales continued	10/4/2021	18.4%	30		97.6	Tier 3 "Off Prime"	Tier 2 "Midday"
Agent_22	Supervisor_2	Sales continued	8/2/2021	20.2%	18		98.2	Tier 2 "Midday"	Tier 1 "Prime"
Agent_6	Supervisor_1	Sales continued	10/4/2021	23.2%	7		100.4	Tier 2 "Midday"	Tier 2 "Midday"
Agent_5	Supervisor_4	Sales continued	4/1/2017	22.9%	8		89.3	Tier 2 "Midday"	Tier 2 "Midday"
Agent_52	Supervisor_3	Service	6/16/2020	7.8%	55	Not Available		Tier 1 "Prime"	Tier 1 "Prime"

# Monthly performance tracker

Supervisor

Supervisor 1

Agent Name

Agent 1

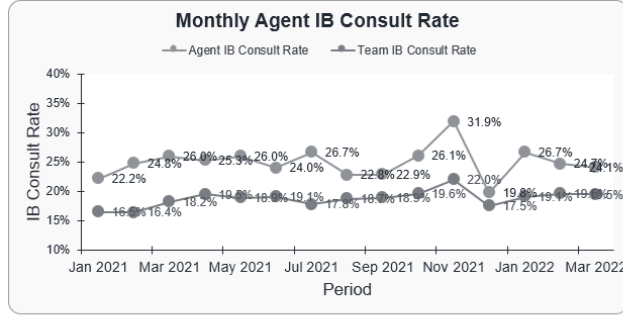
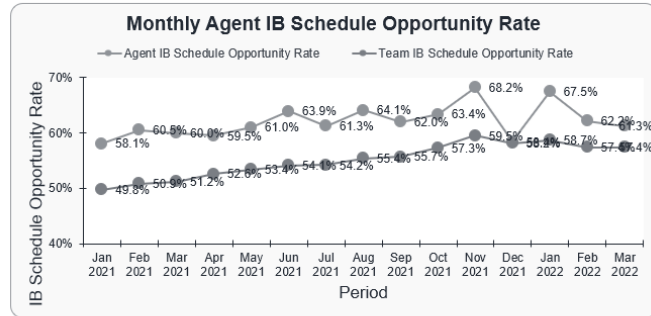
Team

Sales

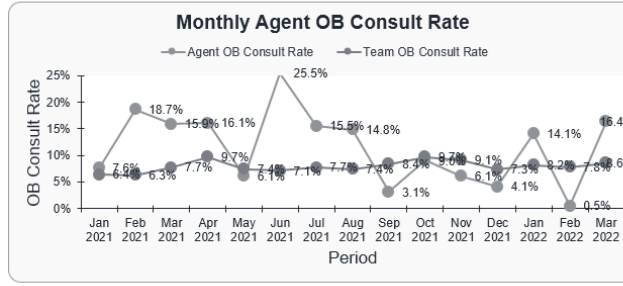
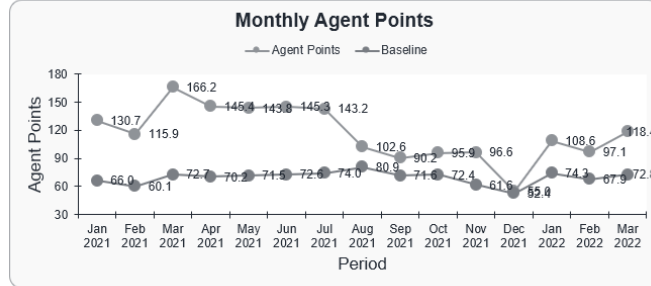
Cell legend

Drop down

Provides user flexibility to access performance at the overall CCT or individual agent level



Comparison of agents' performance against team performance



Summary of Agent vs Team performance

Period	Agent Name	Agent IB Consult Rate	Agent IB Consult Rate Rank	Agent OB Consult Rate	Agent IB Schedule Opportunity Rate	Agent OB Schedule Opportunity Rate	Agent IB Schedule Opportunities	Agent OB Schedule Opportunities	Agent Points	Lives Transformed
Min	-	17.7%	1	0.5%	47.5%	0.5%	302	0	55.0	4
Max	-	31.9%	22	29.1%	68.2%	77.6%	924	108	166.2	50
Jan 2021	Agent 1	22.2%	5	7.6%	58.1%	64.8%	736	34	130.7	38
Feb 2021	Agent 1	24.8%	2	18.7%	60.5%	55.1%	680	53	115.9	32
Mar 2021	Agent 1	26.0%	2	15.9%	60.0%	67.8%	910	62	166.2	46
Apr 2021	Agent 1	25.3%	2	16.1%	59.5%	56.1%	779	54	145.4	46
May 2021	Agent 1	26.0%	1	6.1%	61.0%	53.3%	710	43	143.8	40
Jun 2021	Agent 1	24.0%	2	25.5%	63.9%	77.6%	760	58	145.3	50
Jul 2021	Agent 1	26.7%	1	15.5%	61.3%	35.5%	472	24	143.2	28
Aug 2021	Agent 1	22.8%	5	14.8%	64.1%	46.9%	383	34	102.6	20
Sep 2021	Agent 1	22.9%	7	3.1%	62.0%	37.3%	514	46	90.2	17
Oct 2021	Agent 1	26.1%	6	9.0%	63.4%	43.1%	418	56	95.9	23
Nov 2021	Agent 1	31.9%	2	6.1%	68.2%	36.1%	386	108	96.6	31
Dec 2021	Agent 1	19.8%	22	4.1%	58.4%	32.6%	311	67	55.0	14
Jan 2022	Agent 1	26.7%	2	14.1%	67.5%	34.6%	586	53	108.6	23
Feb 2022	Agent 1	24.7%	4	0.5%	62.2%	36.0%	535	37	97.1	20
Mar 2022	Agent 1	24.1%	5	16.4%	61.3%	36.9%	686	53	118.4	28

KPIs summarizing agents' performance at the monthly level



# Weekly productivity tracker

**Notes:**

1. The productivity of the Agents during the 25 Apr to 1 May period.
2. The supervisors can be selected using the table provided below.
3. The 'Grand Total' captures the total unavailable time.

Cell legend Drop down**Supervisors List**

Supervisor Name	Include
Supervisor 1	Yes
Supervisor 2	Yes
Supervisor 3	Yes
Supervisor 4	Yes
Supervisor 5	Yes
Supervisor 6	No
Supervisor 7	No
	No
	No
	No

**Summary of Agents Productivity - 25 Apr to 1 May**

		Break and Lunch Summary					
Agent Name	Supervisor	Hours worked	Break minutes allotted	Break minutes taken	Lunch minutes allotted	Lunch minutes taken	Break and Lunch balance (mins)
Agent 1	Supervisor 1	34.2	128	140	120	126	17
Agent 2	Supervisor 1	22.0	82	88	120	121	6
Agent 3	Supervisor 2	34.2	128	129	150	150	1
Agent 4	Supervisor 2	40.0	150	151	120	120	1
Agent 5	Supervisor 3	40.7	152	135	270	300	13
Agent 6	Supervisor 4	31.2	117	107	120	124	-6
Agent 7	Supervisor 3	60.6	227	161	180	321	75
Agent 8	Supervisor 4	29.8	112	95	90	91	-16
Agent 9	Supervisor 4	37.6	141	148	120	123	10
Agent 10	Supervisor 4	30.2	113	67	90	88	-48
Agent 11	Supervisor 5	40.2	151	160	120	123	12
Agent 12	Supervisor 2	39.9	150	147	150	156	3
Agent 13	Supervisor 2	49.7	186	191	150	120	-26
Agent 14	Supervisor 3	41.9	157	152	150	121	-35
Agent 15	Supervisor 3	20.0	75	71	60	61	-3

**Break and Lunch balance**

10 to 20 mins

More than 20 mins

KPIs tracking agents' productivity on weekly basis

Cell legend Drop down**Supervisors List**

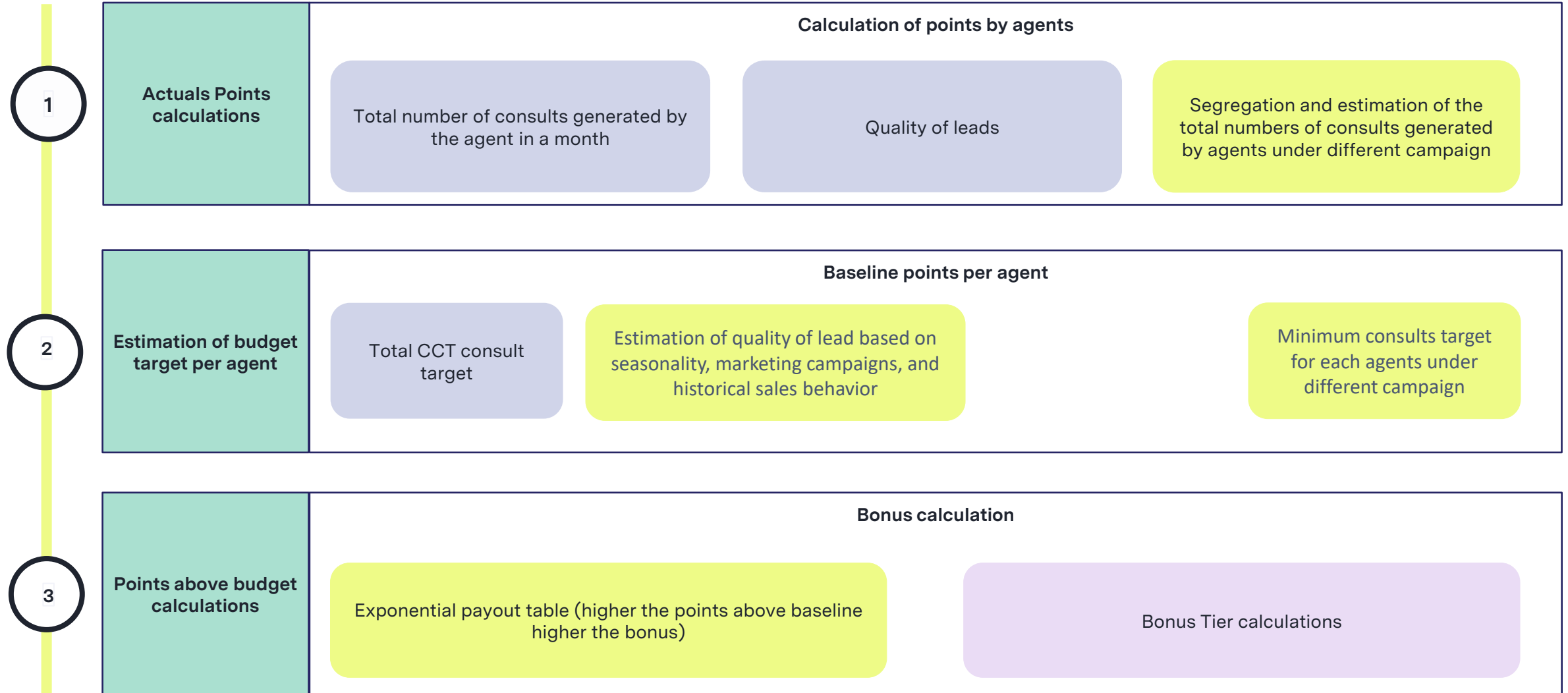
Supervisor Name	Include
Supervisor 1	Yes
Supervisor 2	Yes
Supervisor 3	Yes
Supervisor 4	Yes
Supervisor 5	Yes
Supervisor 6	No
Supervisor 7	No
	No
	No
	No

**Summary of Agents Productivity - 25 Apr to 1 May**

		Calls Summary									
Agent Name	Supervisor	Outbound handled (calls)	Dialer Additional Wrap up	Avg. additional Outbound wrap (mins/call)	Inbound handled (calls)	Inbound Additional WrapUp	Avg. additional Inbound wrap (mins/call)	Total calls handled	Avg. Speed Of Answer (seconds)	Refused (calls)	Adherence (%)
Agent 1	Supervisor 1	90	136	1.5	232	132	0.6	322	7	0	90.5%
Agent 2	Supervisor 1	102	28	0.3	46	47	1.0	148	13	1	91.2%
Agent 3	Supervisor 2	95	2	0.0	154	2	0.0	249	Not Available	Not Available	92.4%
Agent 4	Supervisor 2	204	4	0.0	135	10	0.1	339	Not Available	Not Available	91.2%
Agent 5	Supervisor 3	57		0.0	274	22	0.1	331	14	3	93.8%
Agent 6	Supervisor 4	51	55	1.1	204	34	0.2	255	14	6	84.1%
Agent 7	Supervisor 3	294	16	0.1	222		0.0	516	5	1	91.8%
Agent 8	Supervisor 4	127	1	0.0	114	64	0.6	241	8	1	88.3%
Agent 9	Supervisor 4	166	54	0.3	110	148	1.3	276	13	0	70.9%
Agent 10	Supervisor 4	138		0.0	140		0.0	278	5	0	91.8%
Agent 11	Supervisor 5	29		0.0	227		0.0	256	5	2	90.1%
Agent 12	Supervisor 2	191	4	0.0	114		0.0	305	Not Available	Not Available	91.8%
Agent 13	Supervisor 2	186	8	0.0	235	13	0.1	421	Not Available	Not Available	93.2%
Agent 14	Supervisor 3	101	5	0.0	255	21	0.1	356	15	2	92.2%
Agent 15	Supervisor 3	21	2	0.1	142		0.0	163	8	1	94.6%



# Model approach – Agent's bonus plan

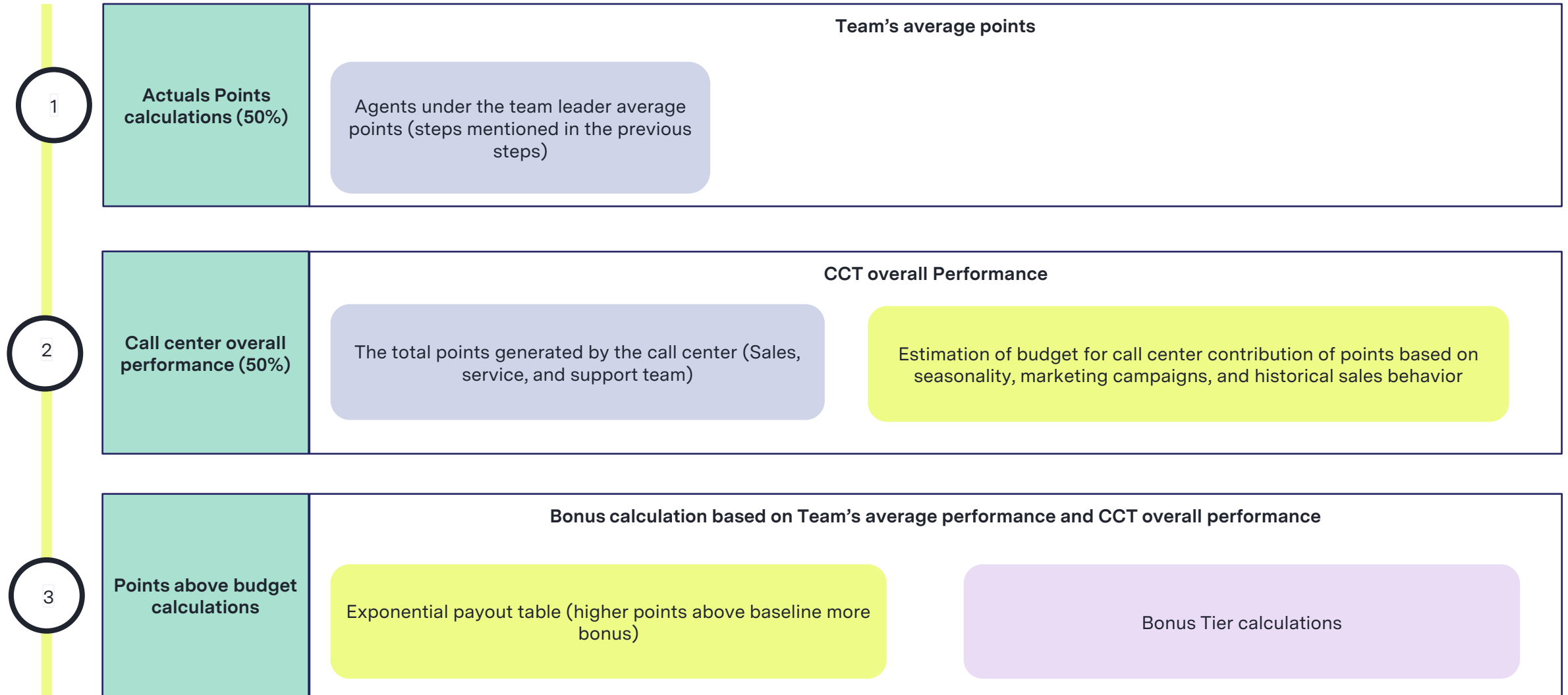


Calculation

Raw data

Designed by Merilytics

# Model approach – Team leader bonus

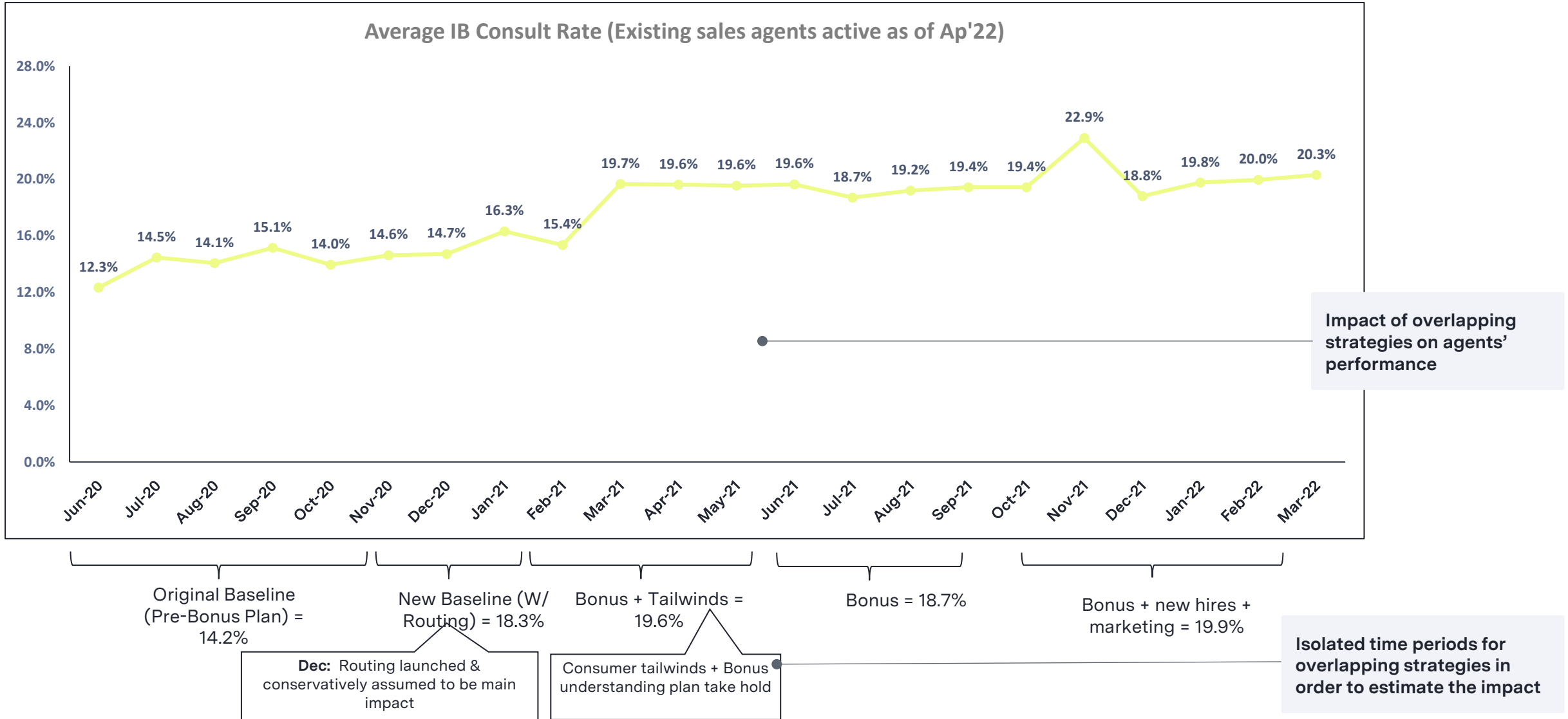


Calculation

Raw data

Designed by Merilytics

# Impact on agents' performance (1/2)



# Impact on agents' performance (2/2)

## IB Consult Rate: Existing Sales agents

Agent Name	Pre-Compensation Plan	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21
Median	14.3%	14.3%	16.1%	15.7%	18.4%	19.6%	19.4%	19.5%	17.9%
Agent 1	13.2%	12.6%	15.2%	13.4%	18.4%	17.3%	15.6%	17.0%	18.1%
Agent 2	13.2%	13.0%	14.3%	14.5%	12.8%	18.8%	17.2%	16.3%	16.8%
Agent 3	14.3%	16.6%	14.1%	19.2%	22.0%	21.5%	19.7%	17.7%	16.9%
Agent 4	16.0%	14.8%	19.1%	19.4%	19.5%	19.6%	23.0%	22.0%	17.9%
Agent 5	13.2%	13.5%	12.1%	16.8%	12.9%	15.8%	17.7%	16.9%	13.6%
Agent 6	17.6%	16.6%	17.8%	15.5%	19.9%	21.4%	19.3%	19.4%	17.7%

Existing Agents increased Median Consult Rate markedly

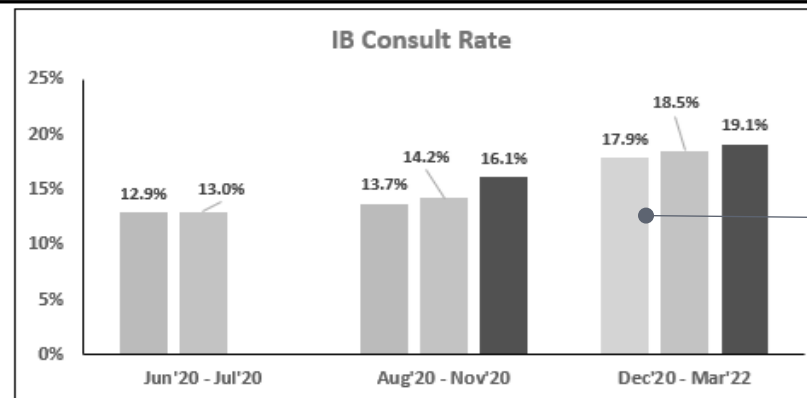
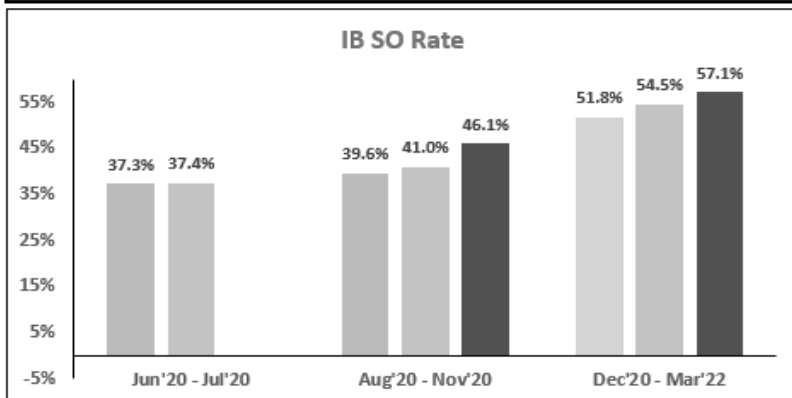
### Note:

- Agents hired post Jun'20 are classified as "New" agents and before as "Existing" agents
- The period of the analysis is segmented into the following phases:
  - Jun'20 to Jul'20 - Pre Sales-Service Classification
  - Aug'20 - Nov'20 - Pre implementation of compensation plan
  - Dec'20 - Mar'22 - Post implementation of compensation plan

### Chart Legend

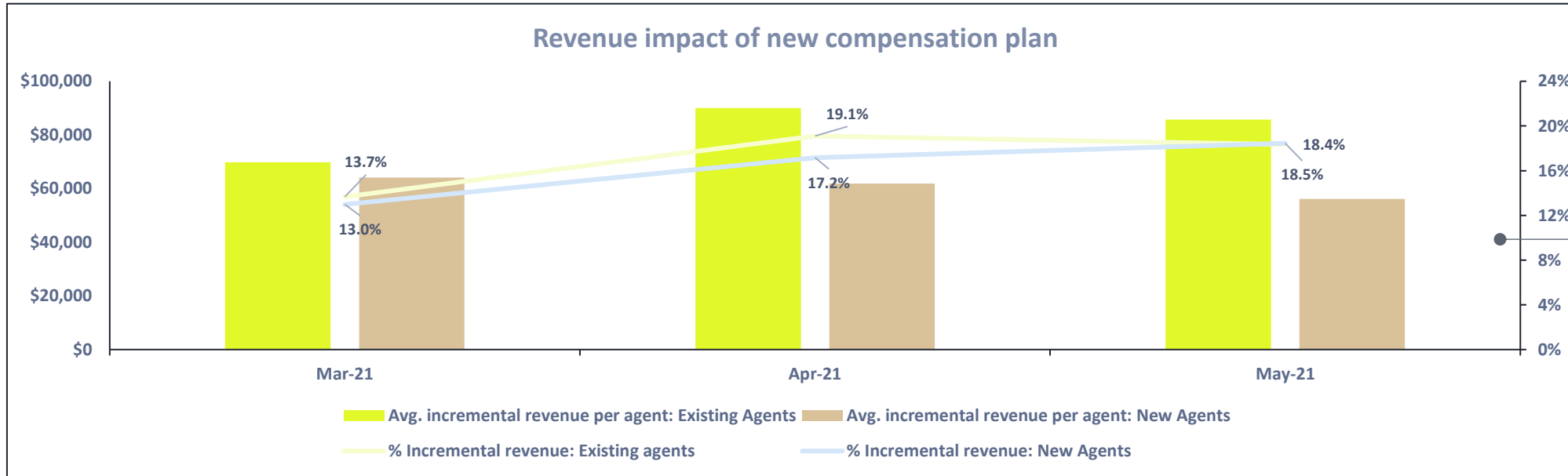
Existing Agents - Pre compensation plan  
Existing Agents - Post compensation plan  
New Agents  
All Sales Agents

## Phase wise trends: Existing vs New agents

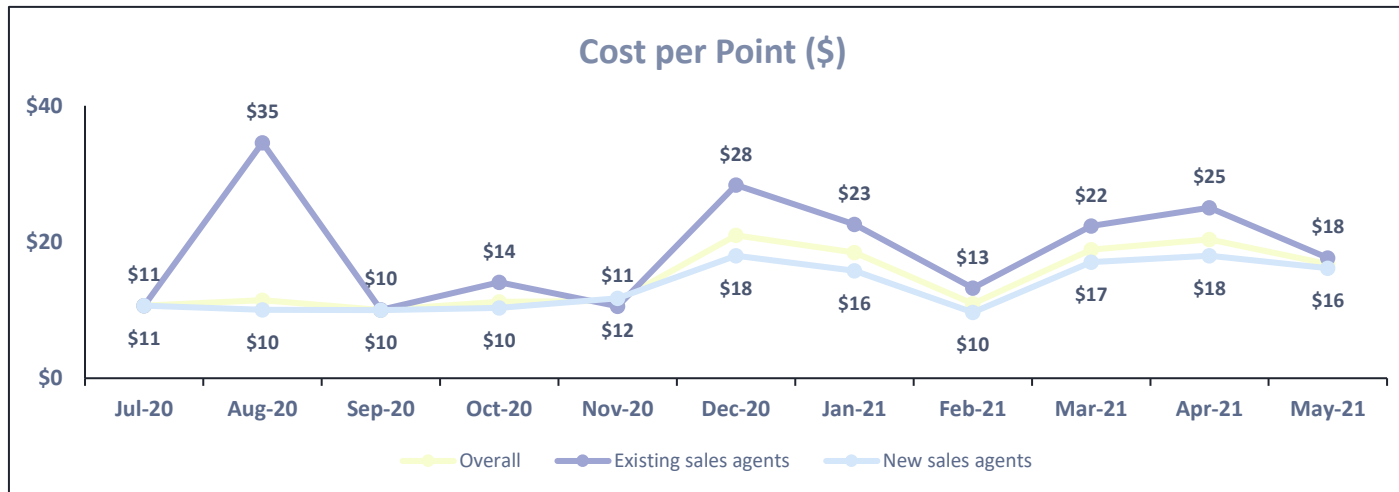


Existing Agents are hitting higher Consult Rates than they did before

# Impact on cost and revenue



Average incremental revenue per agent has increased by ~\$60K/month



ROI Summary: Overall Agents		
Months	ROI	
Mar-21	81.2	
Apr-21	102.5	
May-21	158.4	

Positive ROI of incremental cost and revenue

Cost per point increased by 62% under the new compensation plan1

1. New compensation plan driving the agents' performance leading to more revenue and cost (bonus) to the company.