



CASE STUDY

Utilizing conversation intelligence to increase sales, improve agent performance, and optimize quality management



We went from zero visibility of issues to being able to not only identify but quantify what we can change that would have a big impact.

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100% of customer calls are now analyzed for net sentiment and other performance metrics

70% of calls is the target for all cross-sell activities

18% of calls are already asking “Who else can we protect?” and growing

SUMMARY

The Auto Club Group, a AAA affiliate, wants to deliver the highest level of customer service and value to their members.

Leveraging speech analytics helped to deliver the objective and actionable data needed to make quantifiable improvements to the business.

Focusing on when and how an agent was successful, instead of highlighting what they did wrong, is proving to be a more effective method of changing behavior.

Leveraging custom metrics from speech analytics is helping ACG coach their agents on cross-selling other products, helping to transform the contact agents from a cost center to a profit center.

Optimizing customer evaluations to make business improvements

The Auto Club Group (ACG) is the second largest AAA club in North America, serving more than 14 million members across 14 U.S. states, the province of Quebec, Puerto Rico, and the U.S. Virgin Islands. For over 100 years, AAA has provided safety, security, and peace of mind. ACG advances AAA's mission by providing a full suite of products and services to millions of AAA Members, from roadside assistance to insurance to travel support. ACG takes pride in always being there when members need them, delivering the highest level of customer service and value to every member. The Auto Club Group belongs to the national AAA Federation, which is committed to improving the lives of over 60 million members across North America.

ACG's previous customer survey process for Insurance, the target of their current phase of speech analytics, relied on an external vendor's call center to make outbound calls and follow up on customer perceptions. This was a manual process that evaluated only one percent of transactions, or 4 to 5 transactions per agent per month. Agents were not allowed to deviate from a rigid 30-question survey script and the feedback from these calls was more about dissatisfaction with the vendor's agents and process than it was about ACG's services. The result was inconsistent call center performance, insufficient data to coach agents or prioritize improvement opportunities, and no way to measure referral or cross-selling activity.

ACG chose to deploy Medallia as part of a broader voice of the customer quality management and improvement program. The objectives were to significantly increase the percentage of transactions evaluated, capture more objective and actionable data, and make quantifiable improvements to the business. For example, ACG would get a few calls each day complaining about the website, but without specifics. The team wanted to be able to quantify the amount of website complaints and gather

specific details on what could work better.

Improving agent performance by focusing on success

The ACG Voice of the Customer team realized that they needed additional capabilities to achieve their objectives. They engaged with Medallia to discuss options for maximizing the percentage of calls that were monitored and getting a better understanding of the actual customer experience. Specifically, the team envisioned dashboards with metrics and actionable insights about customer sentiment, pain points, and coaching tips for agent performance.

AI-powered speech analysis, call transcripts, and automated text scoring enabled immediate feedback of virtually every call. Reading between the lines of the transcripts, acoustic analysis derives emotional metrics on both the customer and the agent, based on measurements such as amount of silence, clarity, speech patterns, and overtalk.

At first, the agents had a negative response to these capabilities, thinking it was just another form of “big brother” surveillance. However, ACG turned the behavior to coaching on positives instead of negatives, helping to change the agents’ attitudes. For example, emphasizing the words and tone when an agent was successful in the past, as opposed to highlighting what they did wrong. Agents and leaders can also compare their perception of a call to the system’s emotional metrics and frame the review with more objective data.

Dashboards with detailed metrics such as script adherence, communication skills, and daily quality scores provide agents and their leaders with the information they need to meet and exceed their goals. Agents can see their own performance

percentages and examples of what has been successful for them and adjust scripts to their style. Leaders can see agent and team rankings, net customer sentiment, and trends on usage of key terms. Compared to the zero visibility they had before deploying Medallia, team leaders can more easily work on behavioral modification, coaching, and accountability, backed by detailed assessments and specific examples.

Increasing sales with meaningful and actionable insights

Beyond improving customer sentiment and agent performance, one big benefit that ACG gained from using speech analytics was an increase in cross-selling of products and services, turning the contact center into a profit center. This campaign is called “Who Else?” and encourages agents to ask about the customer’s household to see if there are other family members that could be protected with AAA services. Agents are also being encouraged to talk about AAA insurance services, which the organization has been selling for decades but few members seem to be aware of.

In support of this initiative, ACG and Medallia built some custom metrics related to each of the cross-sell opportunities to display on their dashboards. Weekly and monthly health checks show leaders the referral metrics and trends and enable immediate comparison to sales goals. What percentage of agents asked, “who else can we protect?” in their call, promoted the insurance offerings, or informed customers about savings available by bundling services?

Before implementing speech analytics, we had no way of seeing the issues our customers were facing. With the use of this technology, we are now able to make informed decisions based on concrete data, allowing us to shift our focus in coaching our agents and ultimately improve our service.

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Finally, the detailed information available from Medallia Speech enabled ACG to understand the website complaints and make specific improvements. With the ability to measure all calls, it turned out that about 2% of 4 million calls per year included website complaints. Further investigation showed that most of the complaints could be addressed by adding or improving self-service capabilities, such as adding or deleting a vehicle from a member’s profile, changing an address, or getting an insurance quote. Making these website changes not only helped to reduce the number of complaints, it also reduced the overall call volume, as customers could now take care of these simple tasks themselves.

ACG is just beginning to reap the benefits of using speech analytics in their contact centers. Teams are using the additional information to further improve the agent coaching process and increase cross-sell opportunities, and company leaders now have a wealth of information to drive new initiatives or fine tune existing services.

About Us

Medallia is the pioneer and market leader in customer, employee, citizen, and patient experience. As the leading enterprise experience platform, Medallia Experience Cloud is the mission-critical system of record that makes all other applications customer and employee aware. The platform captures billions of experience signals across interactions including all voice, video, digital, IoT, social media, and corporate-messaging tools. Medallia uses proprietary artificial intelligence and machine learning technology to automatically reveal predictive insights that drive powerful business actions and outcomes. Medallia customers reduce churn, turn detractors into promoters and buyers, create in-the-moment cross-sell and up-sell opportunities, and drive revenue-impacting business decisions, providing clear and potent returns on investment. For more information visit www.medallia.com.