EVAN CUMMACK

REI-LING HUDSON

SHOP TALK

1:00 PM ET / 10:00 AM PT
(45 MINUTES)

UNLOCK THE POWER OF YOUR PEOPLE: DIVE INTO THE DATA ON HOW YOUR TEAM ACTUALLY WORKS

MODERATED BY:

FIN

CUSTOMER RESPONSE SUMMIT *Virtual*

CRS Shop Talk

Unlock the power of your people:
Dive into *data* and discover *how your team actually works*

Today

1) Agent Instrumentation: Why now?

1) Using Data to Drive Continuous Operational Improvement

1) Case Study:
   Using Work Insights to Improve CX

Agent Instrumentation

Why now?

The World Has Changed, duh. 🙄

Casper

Mattresses   Pillows   Bed Frames   Bedding   Accessories & Gifts   Bundles   New   Sale

📍 Stores   🛒

🚚 Free, no-contact delivery*   🌙 100-night risk-free trial*   📅 10-year limited warranty*

ADVANCED SUPPORT

Wave Hybrid

NEW! Snow Technology

From $1,595.00
Available in 6 sizes

Quick view

MOST PLUSH

Nova Hybrid

NEW! Snow Technology

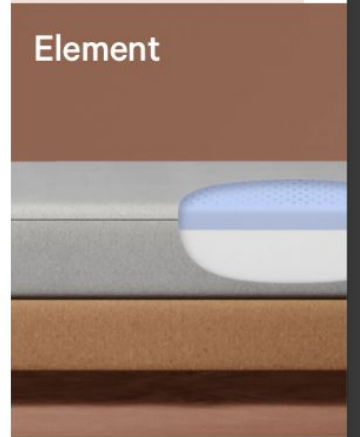From $1,195.00
Available in 6 sizes

Quick view

MOST POPULAR

Original

From $695.00
Available in 6 sizes

Quick view

COMFORT UNDER $400

Element

From $395.00
Available in 6 sizes

Our most supportive mattress to

Our softest mattress with

Our most popular mattress, with

Casper comfort at a

Display a menu

TESLA

Model 3

Est. Delivery: December

Purchase Price | Potential savings*

353mi | **145**mph | **4.2**sec
Range (EPA est.) | Top Speed | 0-60 mph

Rear-Wheel Drive

Standard Range Plus | $37,690*

Learn more about Range and Performance

Dual Motor All-Wheel Drive

Long Range | $45,690*

$51,490 Purchase price | $47,190 After potential savings

Display a menu

🏷 **Special offer: Get $100 off with code SPACE** ✕

talk space

How it works   Business   Join our network   Log in   **Get started**

Feeling better starts with a single message

What type of support are you looking for?

| **Individual** Therapy for me | **Couples** Therapy for us | **Teens** For ages 13-17 | **Psychiatry** Medication mgmt. |

FSA/HSA approved   HIPAA COMPLIANT   SECURE SSL

I agree

Beardbrand

SEA SALT SPRAY

★ ★ ★ ★ ½ 837 reviews

$22

Fragrance:

Old Money Temple Smoke Four Vices

Tree Ranger Spiced Citrus Tea Tree

Quantity:

− 1 +

ADD TO CART   • $22

Buy with Pay

More payment options

A day at the beach—in a bottle

Sea Salt Spray takes the standard messy waves and volume you get from a day swimming in salt-water and adds a touch of extra texture and hold to the style. Infused with kaolin to mimic the grittiness of sand, it's almost as good as a day at the
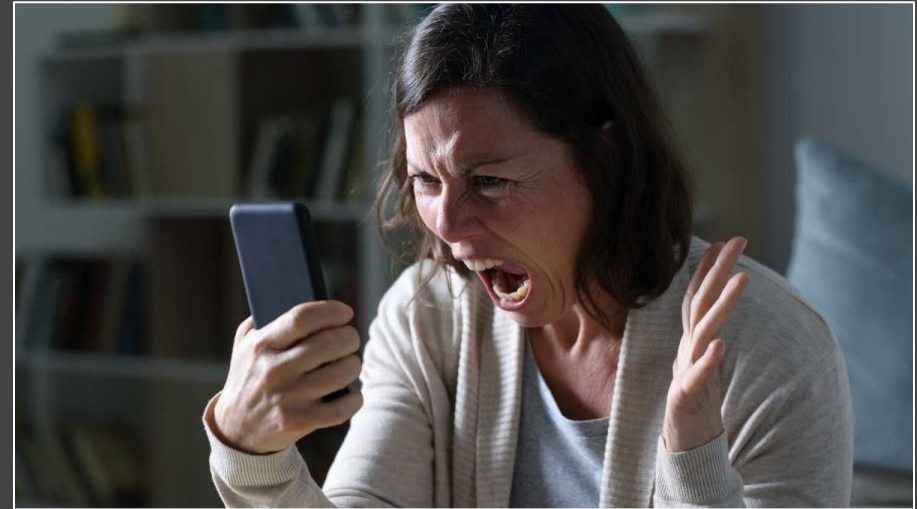
OLD MONEY

SEA SALT SPRAY

3.4 fl oz / 100 ml

Beardbrand

Reduced barrier to entry

Speed to significant scale

Niches become viable

Elevated CX expectations

Less H2H interaction

Higher value H2H interaction

When your Customer

Talks to your People

What you **hoped**
would happen...
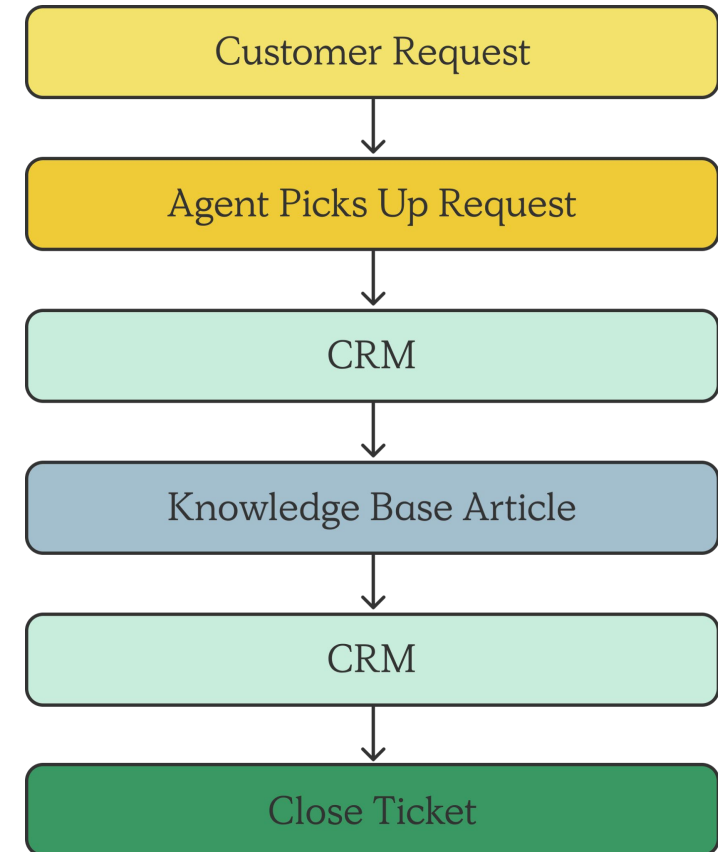
```
┌─────────────────────────────┐
│      Customer Request        │
└─────────────────────────────┘
               │
               ▼
┌─────────────────────────────┐
│    Agent Picks Up Request    │
└─────────────────────────────┘
               │
               ▼
┌─────────────────────────────┐
│             CRM              │
└─────────────────────────────┘
               │
               ▼
┌─────────────────────────────┐
│   Knowledge Base Article     │
└─────────────────────────────┘
               │
               ▼
┌─────────────────────────────┐
│             CRM              │
└─────────────────────────────┘
               │
               ▼
┌─────────────────────────────┐
│         Close Ticket         │
└─────────────────────────────┘
```
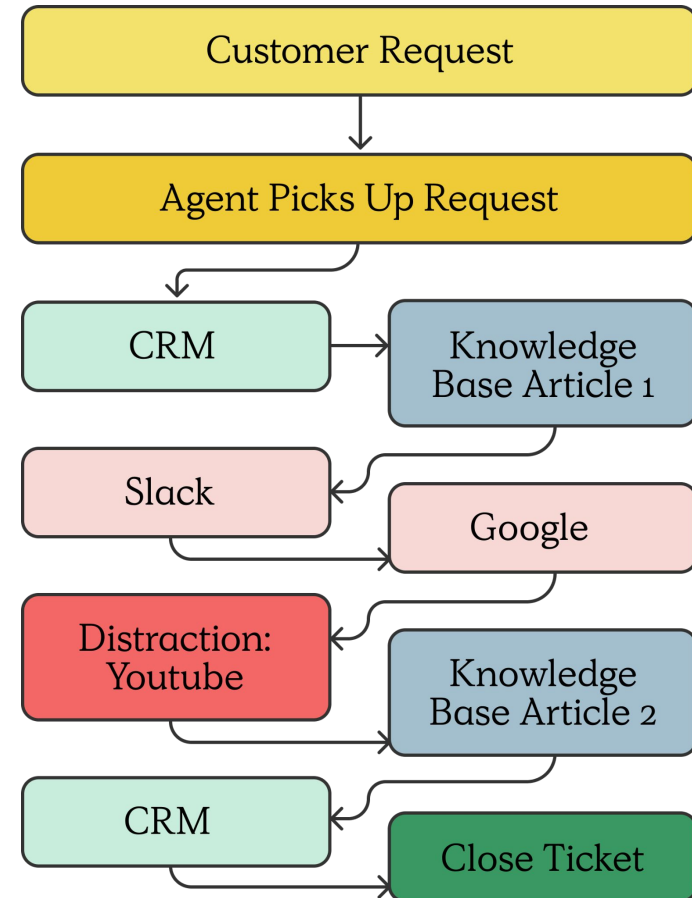
When your
Customer

Talks to your
People

Which Tools?
Which Steps?
How to Improve?

What **actually** happens...
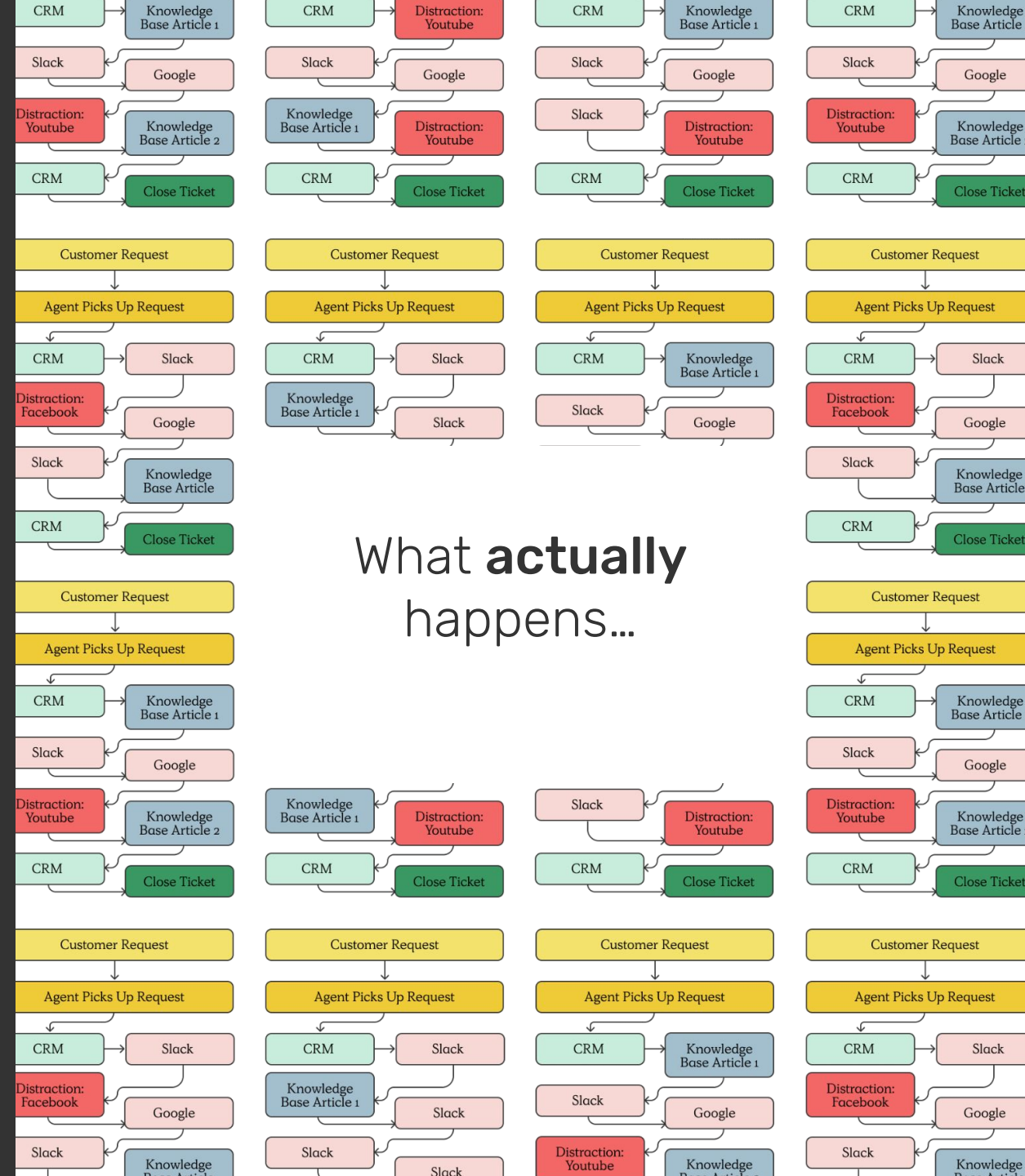
Meanwhile...

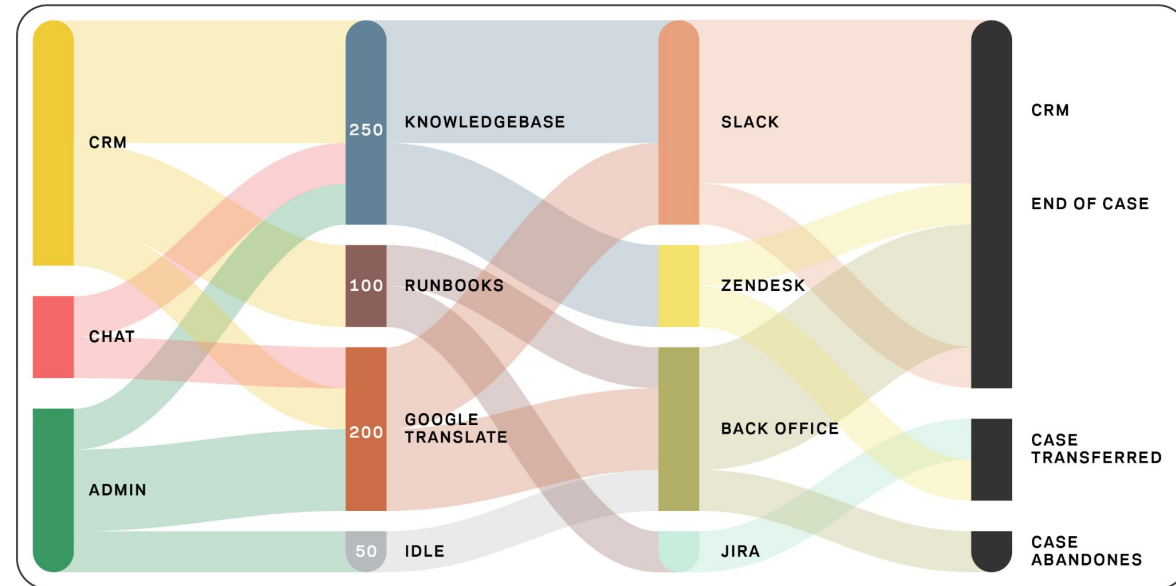**IMPROVE CSAT?**   **INCREASE EFFICIENCY?**   **MITIGATE RISKS?**

You Can't Improve

What You Don't Measure, duh.

Without complete process data, the best you can do is make intuitive best bets to drive your KPIs.

A **Work Insights Platform** that reveals how agents work across applications, enabling better coaching, processes, and technology for teams that delight customers.

What are Best in Class CX Metrics?

True Utilization
and Benchmarking

Automation Opportunities
and ROI

Outlier Resource
Consumption & Root Cause

QA Prioritization

Tool Usage & Duration
by Case Type

And more...
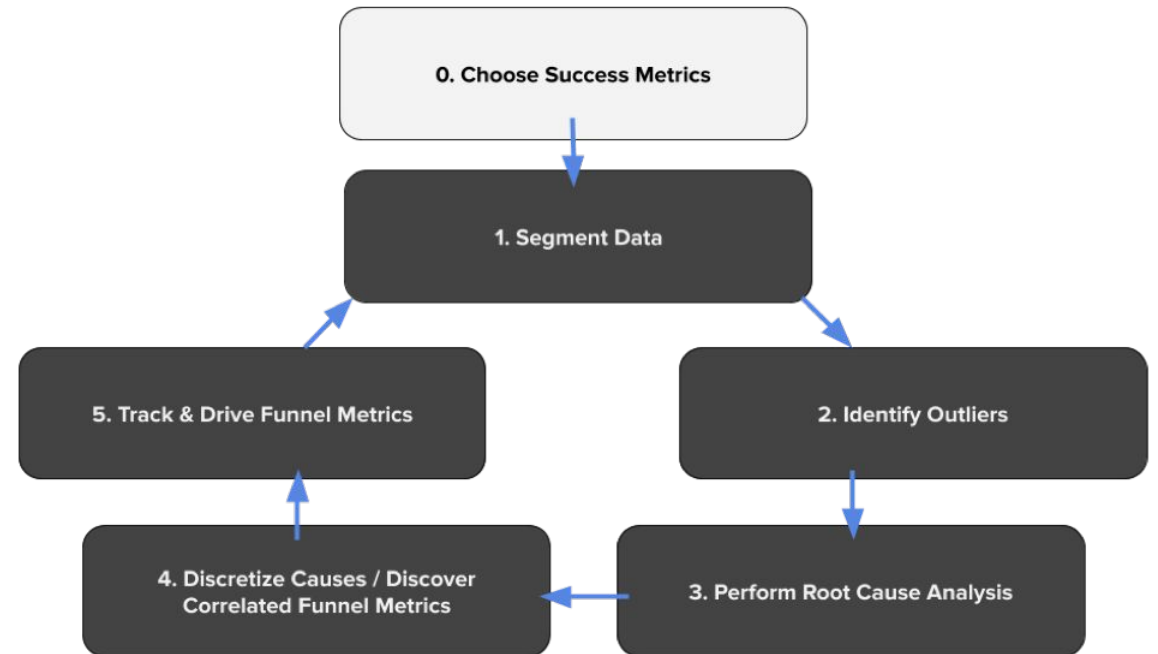
Using Data

To drive *continuous operational improvement*
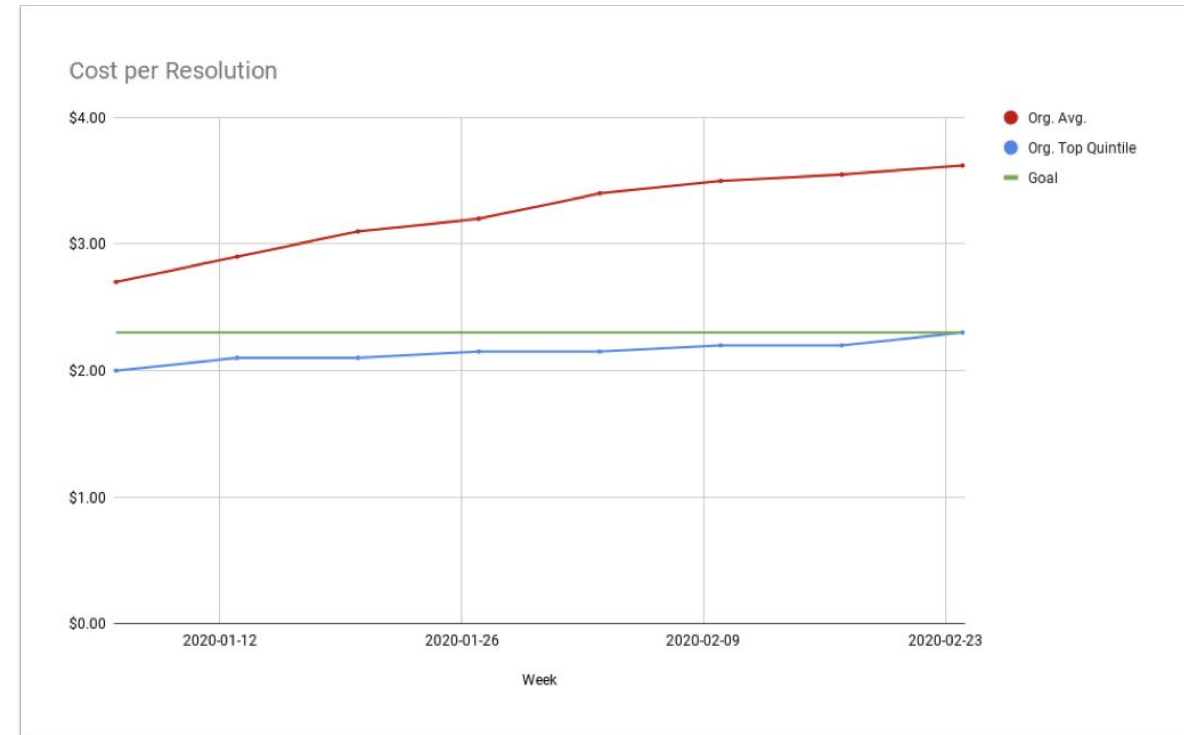
How To Use Data to Optimize Your CX Operations

Developing a flywheel for continuous CX improvement.

Step 1: Choose Success Metric

Start with your #1 KPI

Step 2: Segment Data

Dive one level deeper to understand opportunities for improvement
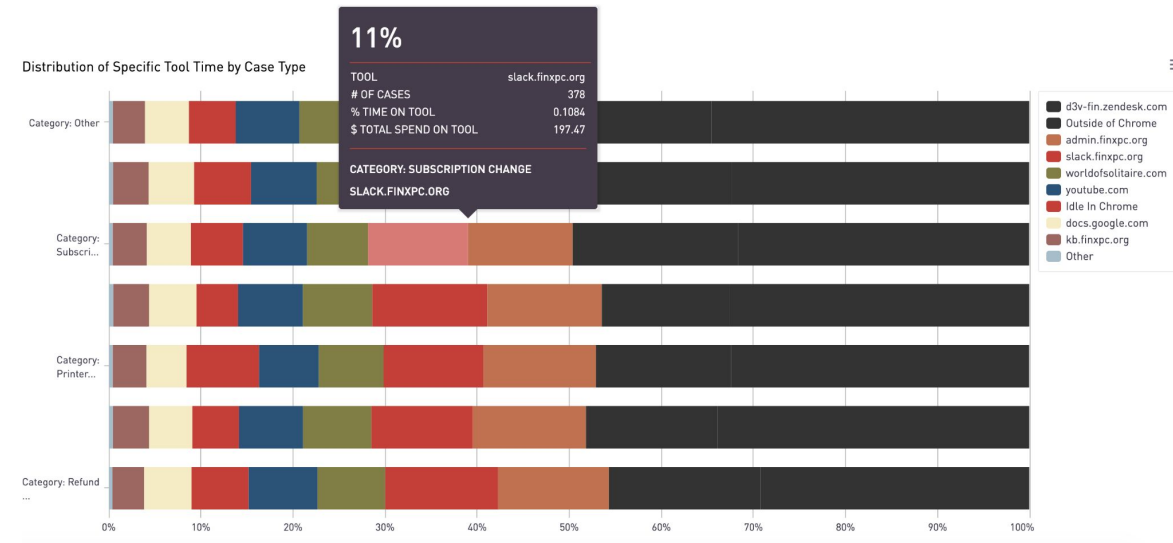
ⓘ Active Time Opportunity (by Case Type)

CASE TYPE	TOTAL COST ($)	% POTENTIAL CAPACITY AVAILABLE	$ OF PAID CAPACITY AVAILABLE
Category: Other	$1,821.03	0.61%	$113.84
Category: Subscription Change	$1,657.81	0.60%	$111.16
Category: Printer Fire	$1,720.23	0.59%	$108.88
Category: Missing Or Delayed Package	$1,775.72	0.55%	$102.64
Category: Connectivity Issue	$1,639.60	0.48%	$89.11
Category: Order Status	$1,459.45	0.48%	$89.44
Category: Refund Request	$673.04	0.21%	$39.51
	$10,746.87	3.52%	$654.58

True Handle Time™ by User Group (over 7 days)

USER GROUP	# CASES	COST PER RESOLUTION ($)	TRUE HANDLE TIME (MIN)
QA	557	6.46	13.60
Phone	536	4.85	12.52
CS	3,033	4.83	11.89
Tier II	571	4.50	12.00
Tier I	1,905	4.45	11.35

Step 2: Segment Data (again)

Distribution of Specific Tool Time by Case Type

11%

TOOL	slack.finxpc.org
# OF CASES	378
% TIME ON TOOL	0.1084
$ TOTAL SPEND ON TOOL	197.47

CATEGORY: SUBSCRIPTION CHANGE

SLACK.FINXPC.ORG

Legend: d3v-fin.zendesk.com, Outside of Chrome, admin.finxpc.org, slack.finxpc.org, worldofsolitaire.com, youtube.com, Idle In Chrome, docs.google.com, kb.finxpc.org, Other

Category: Other
Category: Subscri...
Category: Printer...
Category: Refund...

Process Steps

Step 3: Identify Outliers

Learn the breakage points driving your longtail customer interactions.

Outlier Time Contributions (by Employee)

FIRST TEAMMATE	# OF OUTLIER CASES	% TIME ON OUTLIERS	% CASES BECOME OUTLIERS
Constance Colon	11	56.82%	22.00%
Gustavo Torres	9	40.92%	13.64%
Ted Richards	13	27.91%	10.83%
Allen Powell	13	26.51%	10.32%
Arthur Wilkerson	10	23.91%	5.95%
Harriet Nichols	14	27.61%	9.27%
Enrique Bates	7	18.28%	4.27%
Ernest Ball	9	18.31%	5.33%
Henrietta Francis	6	13.05%	3.24%
Hilda Hammond	6	13.30%	3.37%

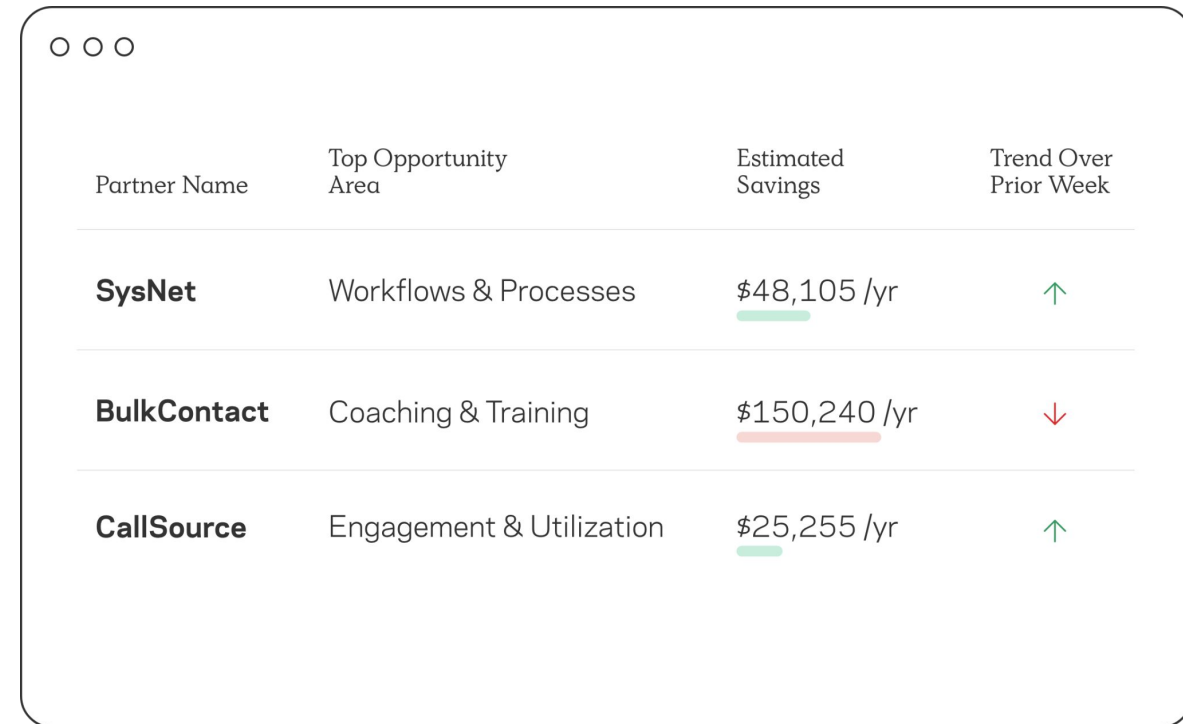| CASE TYPE	# OF OUTLIER CASES	% TIME ON OUTLIERS
Category: Missing Or Delayed Package	17	15.94%
Category: Printer Fire	14	14.81%
Category: Connectivity Issue	21	18.64%
Category: Subscription Change	19	16.05%
Category: Other	21	17.30%
Category: Order Status	16	16.54%
Category: Refund Request	9	20.57%

Step 4: Perform Root Cause Analysis

Understand true causes for failure and what drivers outliers in performance.

Step 5: Accurately Pinpoint Breakage Points

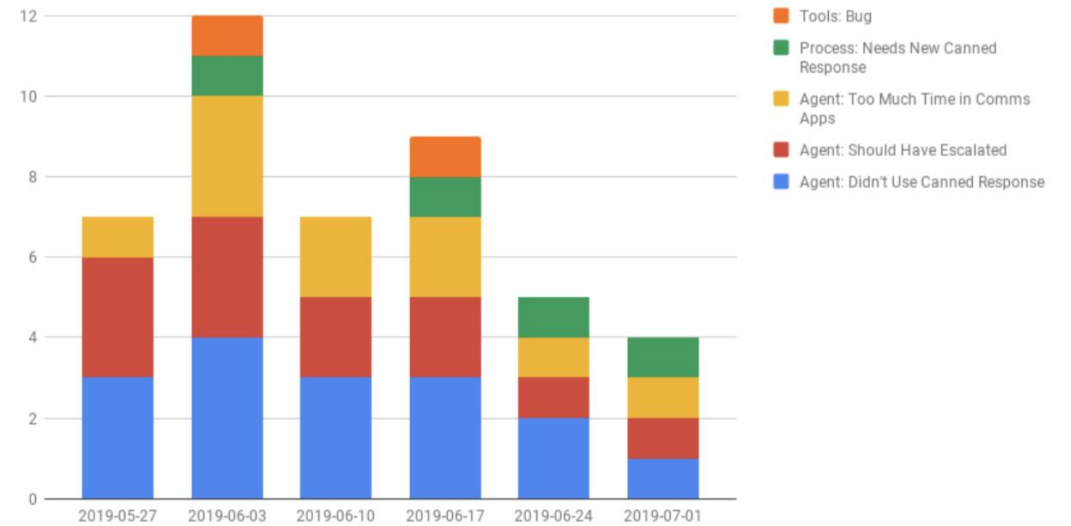Learn whether inefficiencies are because of an agent issue, bad process, or broken tool at scale.

Partner Name	Top Opportunity Area	Estimated Savings	Trend Over Prior Week
SysNet	Workflows & Processes	$48,105 /yr	↑
BulkContact	Coaching & Training	$150,240 /yr	↓
CallSource	Engagement & Utilization	$25,255 /yr	↑

Step 6: Track and Drive Funnel Metrics

Root Causes for p95+ Handle Times: Andrew K.

Legend:
- Tools: Bug
- Process: Needs New Canned Response
- Agent: Too Much Time in Comms Apps
- Agent: Should Have Escalated
- Agent: Didn't Use Canned Response

% Time in Zendesk CRM

Legend:
- BPO-1
- BPO-2
- Goal
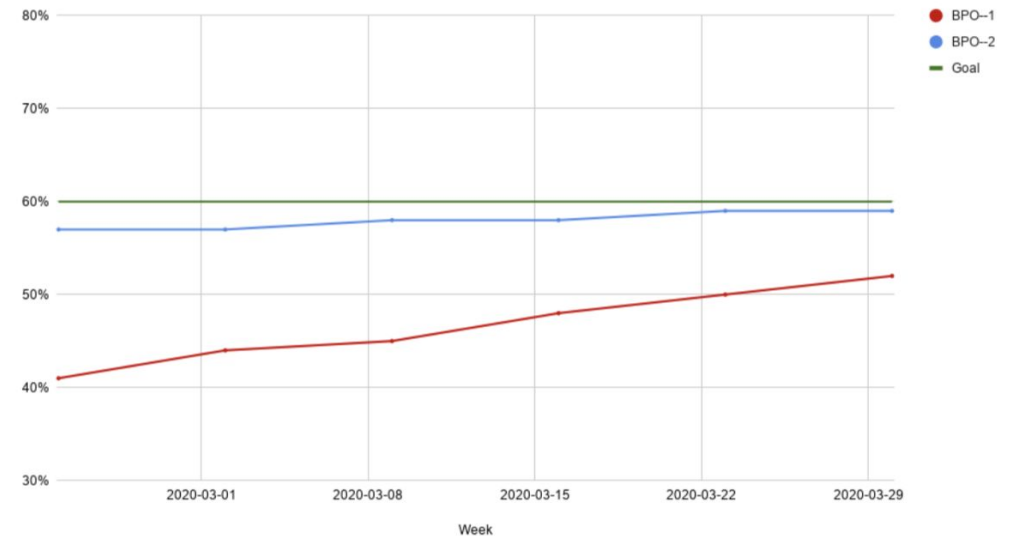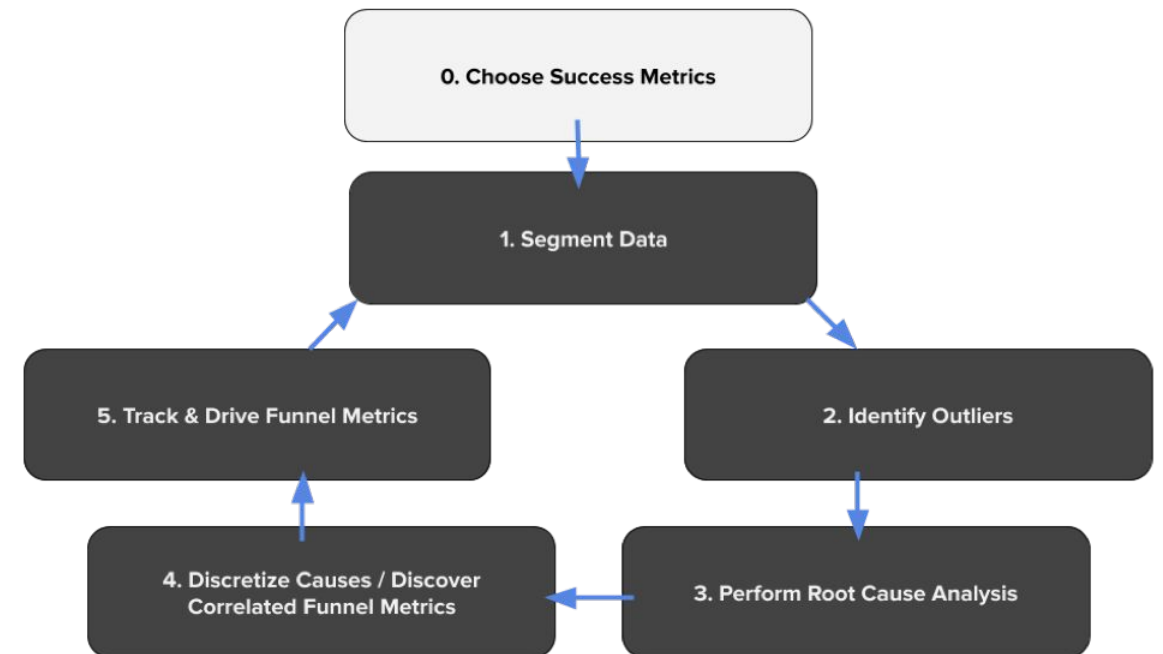
Rinse and Repeat

Find the next biggest opportunity and go back to step one.

Opportunities for Improvement

39% from **outlier interactions**

36% from **under-utilization**

15% from **coaching opportunities**

10% from **workflow definition**

Opportunities for Improvement

25% of teams are missing out on **275 hours/agent/year** of potential productivity

The average agent spends **over one third of their day** not closing tickets

10% of tickets require **10 or more interactions** to resolve (vs. most tickets require only 1 interaction)

FIN

Case Study

Using Work Insights to Improve CX

Helping companies achieve better outcomes

25 %
Decrease in Average Handle Speed

16 %
Increase in agent utilization

15 %
Interactions identified with potential data leakage

The Secret Weapon of the World's Fastest Growing Companies

coinbase

airbnb

Uber

OpenTable®

DOORDASH

SWIGGY

35

BACKED BY

First Round

COATUE

Accel

KLEINER PERKINS™

PRIVACY & SECURITY CERTIFICATIONS

SOC2   **HIPAA**

PCI/DSS   **GDPR**

ISO 27001 & 27701 Certification expected in late 2021

Questions?

CRS attendees can get a free diagnostic report to kick start this continuous improvement process.

Email ecummack@fin.com to learn more.

Thank you for attending this session.

For more information about Fin, go to: https://fin.com