



Trust Orchestrator's Agent Navigator used to resolve complex service queries

The contact centre of a large South African insurance company offers support for a broad range of client service queries, from account queries to claim processing and complaint handling. Their rewards product impacts all queries, yet required specialist knowledge to be able to service.

The complexity of the product and procedural rules meant a specialized Tier 2 team needed to be established. This team only dealt with this product. If a query related to the reward product, agents were required to transfer the customer to the Reward Product specialist team to deal with.

The business was eager to move away from specialist teams, and to create a universal agent capable of handling each and every call type without having to pass it on to a specialist. Attempts to train staff to become generalists failed due to the sheer volume of information they needed to onboard, and the tenure required before they could operate at this level.

Attempts to improve the knowledge base; introduce cross-functional teams; and launch an AI-driven chatbot to assist them with information-related queries had failed.



The Challenge

- **Business agility.** Staff struggle to adapt to new roles, tasks, products and rules. This limits the ability to make and adopt key changes rapidly.
- **Consistency.** Customers have different sales and service experiences depending on the person or channel involved. This impacts the Insurer's ability to attract and retain customers.
- **Compliance.** The risk of staff forgetting to do or say what is required by law is high. Staff also fail to record everything in enough detail to be compliant.
- **Time and cost to competence.** It takes staff a long time to learn new products, policies and procedures. They also forget important details.
- **Key person risk.** The Insurer had only a few Subject Matter Experts with deep content experience. These staff were nearing retirement and the business ran the risk of losing this critical decision-making capability
- **Future Proofing.** With increasing digitization, staff run the risk of being left behind (digital redundancy).

The Business Requirement

In summary, the business was looking to reduce the cost to serve while improving service quality. Key measures targeted included:

- + Improve agent's speed to competence
- + Enable agents to perform like universal agents
- + Improve call consistency and quality
- + Improve first-call resolutions
- + Improve call reporting and insights
- + Improve client service ratings



The Solution

The business decided to deploy Trust Orchestrator's Agent Navigator to help agents answer all known service queries at the level of an expert.

A team of CLEVA automation engineers worked with the contact centre service team to initially capture the contextual decisioning logic that the few experts were applying when dealing with queries relating to their Reward programme – logic that is impossible to document or capture using decision-tree flows.

Over 8 weeks, the team worked tirelessly and soon had every known service query relating to this product (2904 conversation journeys) captured within Trust Orchestrator.

The Agent Navigator was then made accessible to a target group of agents (a mix of tenured and non-tenured). As a call came in, the Agent Navigator would guide the agent in context, helping them ask the right questions, offer the right answers and take the right actions at the right time, while also providing a detailed call report to prove it.

The Solution (continued)

Once the accuracy of the Agent Navigator was validated, the Call Centre then began exploring how to partner the Agent Navigator with a team of RPA digital workers. These back-office processing specialists would ensure that all required system work is automatically performed, leaving the agents to focus on the customer conversation.

In addition, the business looked to make Trust Orchestrator accessible directly via the existing customer web portal and mobile app. The aim was to offer true self-service that results in processed actions i.e. move beyond simple informational



The Results

The Agent Navigator was rolled out to a team of tenured (over 18 months experience) and non-tenured agents, and their performance was assessed over 4 months and compare with historic performance data. The following results were obtained:



Improved customer satisfaction. Non-tenured agents who used the Agent Navigator scored 100% customer satisfaction vs 23% scored by those who did not use a Agent Navigator . Interesting for tenured agents (over 18 months experience), those who used their Agent Navigator scored 94% customer satisfaction vs 45% scored by those who did not use a Agent Navigator.



Improved agent performance. 96% of agents (non-tenured and tenured) who used their Agent Navigator saw an increase in their performance score (the anomaly was sick for most of the month).



Reduced time to competence. Training was reduced from 6 months to 2 ½ months - a 60% reduction in time to competence.



Improved business agility. Historically a key business rule change took around 1-2 months before all agents were applying it correctly (2-3 weeks for IT to make the change, and up to a month for all agents to have completed the update training). With the Agent Navigator, it took on average half a day to 1 day to update the logic and half a day for approval from the SME (1 to 2 days before all agents were applying the change consistently).



Improved staff experience. The overwhelming feedback from the agents was that the navigator does in fact reduce their anxiety about making a mistake and allows them to focus their energies on the customer conversation and experience. Staff also indicated a high willingness for adoption, and that they were less inclined to leave if offered this form of support.

The Benefits

The Agent Navigator enabled the Contact Centre team to deliver a consistent, compliant level of service to all customers without the historic risk of varying agent knowledge and experience. No matter who answers the call, the customer will be asked the same questions, be offered the same answers, and experience the same outcomes.

Deploying the advisory logic into customer self-service in the future would fundamentally change the Insurer's ability to deliver a cost-effective service across a growing customer base.



Trust Orchestrator™