CASE STUDY

Transforming the Contact Center with Next Generation Conversation Analytics

10 Real World **Insight & Action** Platform Use Cases

"Outcomes are the number one driver of our programs. SuccessKPI's quality monitoring and speech analytics platform has enabled increased automation and efficiency gains resulting in operational savings and better overall agent citizen experience." – **Andy Beamon, Senior Vice President, Total Experience Solutions and Services, Maximus Federal Information Technology.**

Situation Overview

In 2021, the U.S. Center for Disease Control faced a critical public service and education crisis. As vaccinations became available across the United States, the government faced growing evidence of widespread public skepticism. The CDC sought to quickly create awareness, facilitate vaccines, and gain a deeper understanding of the root causes of vaccination hesitancy. This led to the launch of a massive vaccination information hotline with more than 20K remotely deployed and trained contact center agents established to field citizen inquiries. At the core of the strategy was the need to rapidly capture and analyze information to drive vaccination information, acceptance, and distribution across the country.

The Solution:
More than a Contact Center, Next Generation Experience Analytics
Delivering on the mission required getting outside the box of a typical, large-scale contact center, including overcoming many of the mindsets and strategies typically used to solve common challenges faced by dozens of other government entities and business sectors. The solution required big tech to align quickly and collaboratively to deliver a new type of communication solution that unified disparate technologies, channels, and previously incompatible data sources. The SuccessKPI platform was deployed providing an AI-driven business intelligence platform with a unified architecture. The solution enabled cross functional teams to unify data from various technologies and capture insights across all forms of citizen input from calls to SMS and WhatsApp messages.

Maximus, a SuccessKPI partner and an expert in government business process outsourcing, deployed a rich blend of contact center technology to meet the challenge including Genesys Cloud, a standalone instance of Amazon Connect for attendance tracking, Twilio, Microsoft Dynamics for CRM, Deltek for time recording, Workday for Human Resource and labor management, and SuccessKPI Power package as the unifying information platform. Deploying SuccessKPI analytics as a universal call recording and data integration framework brought a 360-degree view of the citizen experience. The unifying solution enabled the rapid collaboration across Amazon, Microsoft, Genesys, Twilio, and the CDC data team. The entire solution progressed from vision and testing to soft and hard launch in less than 8 weeks. The success of the program relied on the combined power of the data integrated across this rich fabric of technology. What began as a data unification and reporting initiative powered by artificial intelligence quickly blossomed into dozens of high-powered use cases applicable to any large enterprise contact center.

Top Use Cases supported
Though iterative and collaborative prototyping the following 10 uses cases were deployed in 8 weeks.

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1 Rapid deployment of pixel perfect reporting picture

The CDC outlined a key set of minimum basic cross channel reports that were required for launch. They presented detailed sample reports to Maximus. This is a common requirement in new platform launches: the client provides familiar data and reporting pictures in well understood operational format along with key metric calculations in order to baseline performance quickly in the early days of the program. With the power of SuccessKPI BI and Reporting capabilities, the team was able to create a pixel perfect replication of traditional and advanced reporting needs within 24 hours of deployment including custom metrics and attributes. The standardized reporting gave CDC leadership and Health of Human Services immediate access to critical information in a format they were familiar with and prepared to act on beginning on day one of deployment.
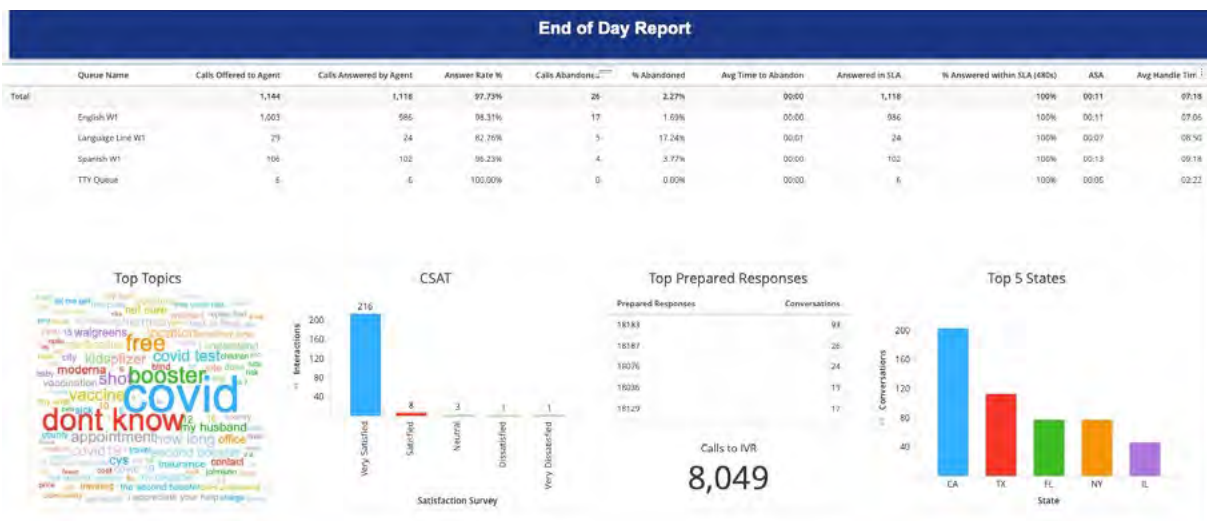
2 Digital enablement with full customer journey visibility across channels and platforms

With a diverse population of 330 million citizens, the CDC faced the need to integrate diverse channels of communication including SMS, voice, and intelligent virtual assistant. As each channel and technology vendor brought inherently different reporting systems and structures, this presented complexities with data alignment. As a vendor agnostic tool, SuccessKPI was able to normalize data feeds,

unique and track individual inquirers across SMS, IVA and live phone calls , in order to provide a full end to end map of the citizen journey, and, most importantly, unify reporting–providing a 360-degree view of what was happening across all channels. Some of the most powerful insights came from exploring citizens crossing journeys using multiple channels and cross reference those data sets against survey results at interaction level to identify areas on of success and opportunity by geographic and demographic sect. All enterprises face a similar challenge in wanting a complete view of client interactions in an ever-evolving digital environment. SuccessKPI's unified platform proved to be a powerful capability deployed across millions of interactions..
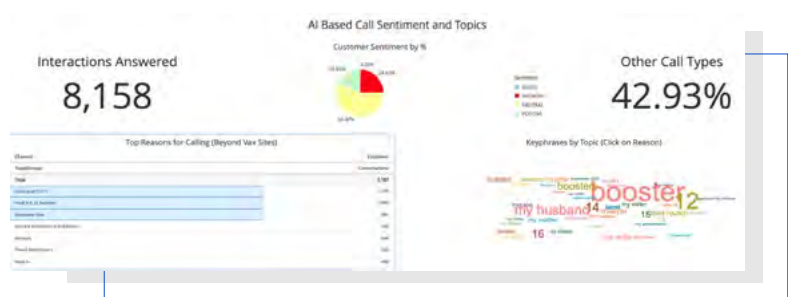
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3 Cross platform daily updates with subscriptions

In order to develop unified insights and valuable daily reporting updates, third party data needed to be integrated from many sources including CSAT responses, virtual assistant conversations, Twillio for SMS messages, and WhatsApp data. The unified reporting brought together the total number of messages, total message direction, and total message by language. The integration of phone numbers into the reporting allowed Maximus to analyze volume, texts, and trends by geographical areas. SMS was mapped to zip code providing powerful insights into how different regions were reacting to vaccine information, which core topics raised concerns, and provided insights on top topics and emerging trends such as vaccines for children, information about side effects, and religious concerns. Subscriptions allowed for the automated delivery of key reporting to a broad spectrum of reporting reviewers to ensure that time-sensitive insights were accessible and transparent. Automation of this delivery allowed for time saved in communicating critical updates. The subscription and distribution cadence also supported the rapid ramp of supervisory and management staff by reducing the administrative time and effort required to train, pull, understand and communicate information both up and down management lines. With a vast WFM staff, it was imperative that all levels across the enterprise refer to the same data sets in their understanding and daily management of the project.

4 Speech and sentiment analytics

The AI-powered speech and sentiment analytics engines provided by SuccessKPI further enabled the teams to quickly aggregate what was being said in customer conversations down to key phrases using topic detection. Sentiment AI helped decode which calls, topics, regions, and channels brought more positive, negative, and neutral sentiment. These insights coupled with powerful visualizations and data discovery tools helped highlight the top reasons citizens called and the frequently used words in a conversation as is pictured in the word cloud below. The engine was instrumental in representing the provider analysis which would capture the responses for various pharmacies like CVS, Walgreens, and Rite Aid. The solution enabled Maximus to not only gain customer insights but to adjust local business strategies to feed into or address consumer sentiment. Diagnostics in topic and sentiment detection led to real world changes to frequently asked questions, logistical changes to how information was deployed, and to how the teams responded to different types of calls. It also allowed the business to quickly identify call drivers for non-forecast spikes in volume across channels and provide immediate feedback to the CDC regarding media blasts, breaking news and other unforeseen factors requiring immediate attention. Many agencies and enterprises face challenges in understanding why customers and citizens are calling, what is driving negative sentiment, what are better ways of handling and communicating difficult information, and how to make changes to improve outcomes. SuccessKPI proved to be a highly capable tool for diagnostics and implementation of real-world change.

5 Quality management with process support

With the need to deploy 20,000 agents in such a short period of time, there was intense pressure on the education, training, and quality management teams to not only staff quickly but to deploy a well-trained, supervised and managed workforce.   SuccessKPI was at the center of this program and delivered a quality management and training platform with the necessary reporting analytics to tie real-world performance to the standards laid out by the quality team. The SuccessKPI quality management solution helped turn every interaction into an opportunity. By

streamlining evaluation standards, reviews and automating actions, a clear picture of agent performance was gleaned from the first day of operation. Machine scoring brought a whole new level of efficiency, automation, and excellence. Using the scores of trained field quality managers, the SuccessKPI AI and ML engines churned and produced reliable and fully automated quality scoring providing a hyper-efficient tool for scale. The evaluation workspace provided an efficient and effective process for evaluating and scoring calls specific interactions using AI and machine
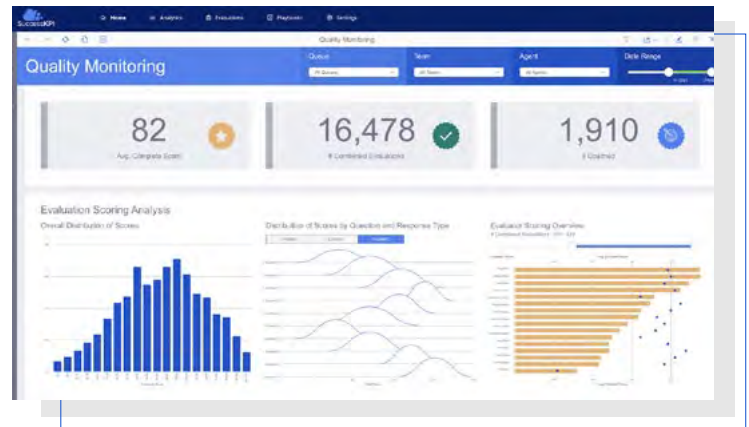
scoring. The quality management team at Maximus utilized the efficiency of the evaluation workspace by creating one scorecard that enabled the ML engines able to effectively evaluate all of their calls—getting beyond sampling. The scorecard that Maximus utilizes for evaluating all their calls contain four categories: "Create Trust", "Achieve Resolution", "Round Out the Call", and "Embrace the Interaction." This systematic approach allowed Maximus to evaluate each part of a conversation, and effectively coach and empower their agents while taking coverage from a small human sample to 100% sampling through AI and ML-powered automation. Maximus estimated the machine scoring enabled a 30% reduction in staffing costs for quality management and supervision at a higher rate of overall customer experience.

6 Audit ready tracking of time and hours

Even basic operational management can be difficult at scale with 1000s of agents working remotely and coming online with unfamiliar processes, systems, and tools. The SuccessKPI tools leveraged by Maximus allowed for unified compliance reporting across multiple time zones, geographies, work force teams. Utilizing feeds from the time sheet system (Deltek), HR system

(Workday) and the underlying cloud platforms (Amazon Connect and Genesys Cloud), SuccessKPI was able to bring together agent demographic and geographic information with time sheets and actual login time to provide a unified view of actual and reported performance. Any discrepancies in these dashboards were then flagged for review to ensure accuracy in timesheet and billing practices across this vast remote workforce. Additionally, this makes streamlining operations more efficient because the feature reduces the workload needed to audit and manage agent submissions. This capability ensured that Maximus was able to ensure billing and reimbursements were processed correctly and accurately submitted for payment.

7 Automated quality management combining sentiment, survey, and third party data

While a contact center can handle millions of calls each day, that volume quickly exceeds supervisory

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capacity. As mentioned previously, the quality management scorecards were deployed in a manual process with extensive reporting. Once the scorecards were calibrated with the help of powerful AI models, SuccessKPI was then able to automate the quality management process. This provides tremendous scalability and 100% call coverage for quality management without hiring new supervisors. This improvement in call scoring and efficiency in manager to agent ratio provided a significant expansion in coverage and compliance while driving significant cost reduction. But even more powerful was the ability to take this 100% coverage and to marry the machine and supervisor coverage with sentiment, third party survey, and other related data to gain next level insights on the data.

8 360-degree view of core business processes (COVID-19 test kit distribution)

In order to achieve its information and reporting outcome goals, the CDC required bringing together a concert of data from various platforms and providers into holistic reporting that resulted in a 360-degree view.

- CCaaS data and third party data
- Millions of citizen contacts
- Agent effectiveness
- Root cause analysis of calls
- Insight into Demography, Topic Trends, Traffic Patterns for rapid response

A unified view became all the more critical when the COVID test kit distribution team hit several snags on deployment. The team turned to the SuccessKPI unified framework for insights and answers. By ingesting new information from ordering and delivery systems, the contact center was able to gain a full view of the lifecycle of request to fulfillment across channels. Through drillable data sets, the team was able to drill into key snags and bottlenecks in processes and improve the overall outcomes and serve citizens better. In this case, the solutions helped identify postal address information gaps and improve communication of actionable intelligence across agencies for improved test kit deployment.

9 Emergency management of critical issues

Although emergency and threatening calls were minimal, they required real-time reporting and quick action. Understanding and identifying critical topics and issues was key to the contact center's successful evaluation of emergency inquiries. Playbook topics enabled SuccessKPI to automatically detect keywords and topics used which required immediate supervisory attention. For example, if someone called and says the word "threat" or makes a specific threat, the topic and Playbook Builder™ tools are orchestrated to trigger emails and SMS messages to the operations team for review. Maximus was able to filter out the crisis calls through Playbook topics and immediately take action on these calls to improve agent behavior and serve citizens more quickly. Such real-time and near real-time alerts have practical use across
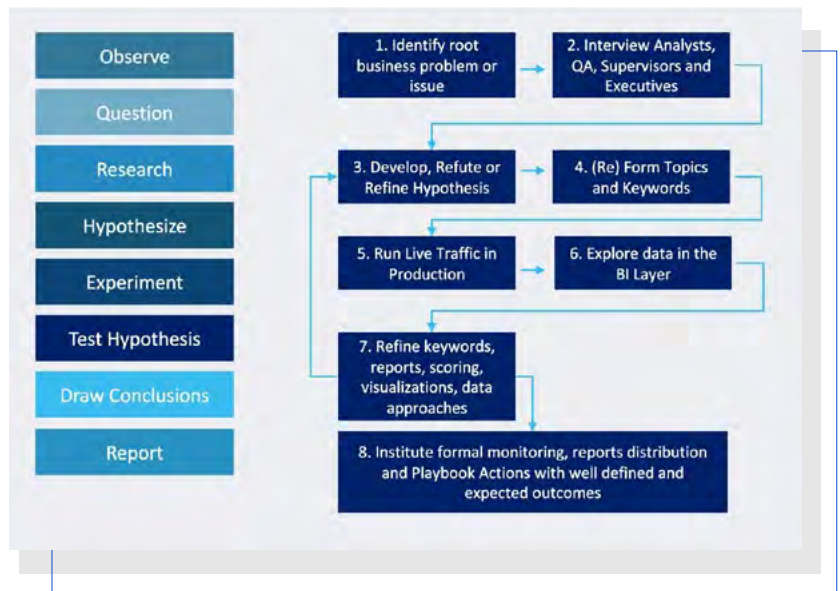
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all enterprises and agencies. As the pandemic has caused many citizens moments of distress, this tool has been instrumental in providing near real-time insights into time-sensitive issues and enable senior management to get ahead of potential crisis situations and calls for help.

10 Iterative studies and analysis (e.g., scientific method use of Playbooks, QM, reporting to understand)

Ultimately, the true power of SuccessKPI emerged in the weekly scrum sessions with the customer expert team. The flexible nature of the SuccessKPI analytics solution made iterative studies and analytics possible, simple, and actionable. By providing full data discovery, easy-to-use customer interfaces for sentiment, keyword, and playbook execution, a broad team was quickly trained and empowered to study conversations with unprecedented speed and depth. The team followed a scientific method to test hypothesis on aspects ranging from agent training and process effectiveness to core issues such as vaccine hesitancy and the power of language to improve empathy. The combination of powerful but easy-to-use user interfaces with real-time processing and artificial intelligence enabled Maximus and the CDC to quickly research issues, test hypotheses, draw accurate fact-based conclusions and to take actions to improve the operation and the citizen experience.

Economic impact

Deploying the SuccessKPI platform as a unified next generation insight and action platform had a material impact on the success of one of the largest contact centers deployed for a government agency. The power of AI and ML drove fast insights and quick action while delivering extreme compliance coverage and a self-funding level of automated quality management. As a result of this program, Maximus and the CDC were able to capture insights about citizen concerns, identify emerging trends and root causes of vaccine hesitancy, decode differences across diverse geographic populations, and help the government to serve the nation better.

SuccessKPI provided a mission-critical information solution to help the team launch a cloud based remote contact center at scale with confidence and speed. The solution brought timely automation, real-time alerts, concrete cost savings, improved transparency and compliance, and an overall improved citizen experience.