The Experience Factor
Igniting Performance with Deep Analytics

Jim Iyoob - Chief Customer Officer, Etech
Shawndra Tobias - VP – CX, Etech
Christopher Basile - VP - Call Center Operations, Phone.com
Steve Trier, EVP – Chief Customer & Strategy Officer, Tethr
Yasir Bugrara - Sr. Director, Voci Technologies
Meet our speakers for today

Jim Iyoob
Chief Customer Officer, Etech

Shawndra Tobias
VP – Customer Experience, Etech

Chris Basile
VP – Call Center Operations, Phone.com

Steve Trier
EVP, Chief Customer & Strategy Officer, Tethr

Yasir Bugrara
Sr. Director, Voci Technologies
OUR STORY

2003
Grew from 400 Team Members in 1 location

Today
3 Countries, 10 Sites, 3,600+ Team Members

Trusted advisor to numerous Fortune 50 companies

NO MERGERS NO ACQUISITIONS

OUR BUSINESS

Customer Engagement Solutions
Inbound & Outbound Interactions, Chat, Sales, Service, and Tech Support

Etech Insights
Actionable Insights for Total Quality Management to Enhance Operational Efficiency and Customer Experiences

Etech Technology Solutions
Software/Application Development, Custom Reporting, WFM

OUR AWARDS

#CCW Vegas - The Experience Factor: Igniting Performance with Deep Analytics

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Agenda - What we will learn today?

Why Speech Analytics?
- Benefits of Speech Analytics
- Why Speech Analytics initiatives fail?

What are your Challenges? – Let’s Discuss
Break Out Session to Understand your Pain-Points
- Understanding Customer Sentiments
- Agent Experience

How to implement Speech Analytics?
- Understanding KPB, VOC Indexing
- Empowering Contact Center Agents by Integrated Coaching

Building a Long-Term Strategy
- Transforming Experience through Analytics
- How to bridge the gap?
- Why Etech for Speech Analytics?
Why Speech Analytics?

- Identify Knowledge Gaps
- Identify Market Insights
- Distinguish and Quantify Coaching Needs
- Improve Client Retention
- Overall insights on in-depth level of performance
- Actionable Insights into CX and Business Opportunities

“I'M JAY IN CUSTOMER SERVICE AND I'M COMPLETELY UNPREPARED TO HELP YOU.”

“But, how may I pretend to assist your call today?”
Measuring ROI of Speech Analytics

Cost Reduction

- Automated Compliance Monitoring
- Avoid non-compliance regulatory fines
- Reducing Call Volume, by identifying customer’s reason for call
- Eliminate unnecessary call backs by improving FCR
- Upgrading the self-service through website and intelligently using IVR programs
- Reduced transfers and time spent on each call
- Reduced training turnover cost

Revenue Increase

- Sales from increased call-conversion rates
- Higher debt collection ratios
- Vastly improved customer service evaluations
- Swifter response to competitive influences
- Reduced customer churn
Why Speech Analytics Projects Fail?

- Shiny Toy Syndrome
- Expecting a Plug n Play Solution
Lack of Operational Domain Expertise in Technology Partners

- Domain Expertise – How many interactions did the IT guy monitor?
- Deliver CX that matters – Relating the trends with real-life examples
- Comparing the Technology Point of View vs End User Point of View
- How to make data actionable & meaningful?
How to successfully execute Speech Analytics?

Alignment with Business Goals

Set Clear Objectives

Prioritize initiatives based on ROI

Aligning Teams & Change Management

Emphasize on Data Security

Transformation to a long-term approach
AI without HI: What do you think about this picture?

Do you think it is spreading hate or injury?

Facebook thinks it is against their community standards.

I appealed against this decision and they disagreed.
AI without HI: What do you think about this picture?

Machine Learning without Human Intelligence equals Censorship too!
This is fine for Facebook’s Machine Learning: Because **Birds don’t Kill**

You know it’s a rough neighbourhood when you see a bird with an ankle monitor carrying a knife...

For your daily dose of ‘Memes’

Let’s Tweet Together
If it looks like a duck, walks like a duck and quacks like a duck...

according to Facebook Fact Checkers, it is in fact, a squirrel.
Natural Language Processing

• Natural Language Processing (NLP) is a subfield of artificial intelligence (AI). It helps machines process and understand the human language so that they can automatically perform repetitive tasks. Examples include machine translation, summarization, ticket classification, and spell check.

• In natural language processing, human language is separated into fragments of unstructured data so that the grammatical structure of sentences and the meaning of words can be analyzed and understood in context. This helps computers read and understand spoken or written text in the same way as humans.

“Each word of an interaction represents 1 piece of unstructured data”

• Data Scientists teach NLP tools to look beyond definitions and word order, to understand context, word ambiguities, and other complex concepts connected to human language. This is your EI Data Engineering team.
#CCW Vegas - The Experience Factor: Igniting Performance with Deep Analytics

## 20 Minutes of AI

### Zendesk, TicketCalls, Felicia Fearn

<table>
<thead>
<tr>
<th>Agent Impact Score</th>
<th>Tethr Effect Index</th>
<th>Today at 12:39am - 7 min</th>
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<tbody>
<tr>
<td>5.3</td>
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- **ST Effect**: A: Acknowledgement
- **ST**: QA: Agent Name
- **Greeting**: Agent Introduction
- **Greeting**: Opening - Thanking the customer

- **A**: Email verification
- **ST QA**: Verify - DOB
- **ST QA**: Greeting
- **ST QA**: Agent Name
- **ST QA**: Acquire - Name
- **ST QA**: Acquire - Email

### Zendesk, TicketCalls, Tiffany Tomlinson

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</table>

- **ST Effect**: High Sentiment, No Change
- **ST Effect**: A: Powerless to Help
- **ST Effect**: A: Acknowledgement

- **ST QA**: Closing - Further Assistance
- **ST QA**: Acquire - Name
- **ST QA**: Acquire - Email

- **A**: Email verification
- **A**: Further assistance

- **Conversation - Power Words**
- **ST Discount**: Member/Membership
- **ST Discount**: General Inquiry
- **ST QA**: Offer Assistance

### Zendesk, TicketCalls, Joyanne Evans

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<thead>
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</tbody>
</table>

- **ST Effect**: High Sentiment, No Change
- **ST Effect**: A: High Sentiment Interaction Handling, No Change
- **ST Effect**: Company Communications: Frustration
- **ST Effect**: Hold Request
- **ST Effect**: A: Acknowledgement
- **ST Effect**: Frustration
- **ST Effect**: A: Advocacy - Initial Provide Help

- **ST QA**: Verify - DOB
- **ST QA**: Offered Further Assistance
- **ST QA**: Offer Assistance
- **Greeting**
- **ST QA**: Closing - Further Assistance
- **ST QA**: Close
- **ST QA**: Agent Name
- **ST QA**: Acquire - Name
- **ST QA**: Acquire - Email

### Zendesk, TicketCalls, Tiffany Tomlinson

<table>
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<th>Agent Impact Score</th>
<th>Tethr Effect Index</th>
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<td>7.2</td>
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</table>

- **ST Effect**: High Sentiment, No Change
- **ST Effect**: A: Acknowledgement
- **ST Effect**: C: Uncertainty

- **Greeting**: Agent Introduction

- **A**: Assurance of Help

- **ST QA**: Closing - Thanking the customer
- **ST QA**: Acquire - Name

- **ST QA**: Acquire - Email

- **ST TCQA**: Issue - No service connection
- **ST Scheduling**: Next Apt
- **ST Scheduling**: Reschedule

- **eDriving**: Agent Identifier - Agent
- **A**: Authentication - Name
- **A**: Identification - Agent (6)

- **ST Effect**: A: Proactive Guidance - Education
- **ST Effect**: C: Web: Login/Password (2)
- **ST Effect**: C: Confusion (2)
Putting it all together

1. Data
2. Sorted
3. Arranged
4. Presented Visually
5. Explained with a Story
Now you have, BIG DATA

THE 3Vs OF BIG DATA

Volume
- Amount of data generated
- Online & Offline Transactions
- In kilobytes or terabytes
- Saved in records, tables, files

Velocity
- Amount of data generated
- Online & Offline Transactions
- In kilobytes or terabytes
- Saved in records, tables, files

Variety
- Amount of data generated
- Online & Offline Transactions
- In kilobytes or terabytes
- Saved in records, tables, files
• What is a ‘Critical Behavior’ or ‘Key Performance Behavior’?

• Why is Critical Behavior Adherence important?

![Bar Chart]

CB=Conversion

- ASK FOR SALE Adherence Rate
- DISCOVERY/PROBING Adherence Rate
- Sales Conversion

Data over weeks (WK 1 to WK 4): 0% to 70%
Once Upon a Time, there were two call centers....

Center Alpha

Center Beta
<table>
<thead>
<tr>
<th>Center Alpha</th>
<th>Center Beta</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tenured leaders with 8+ Years of Campaign Experience</td>
<td>Leaders with 6+ Years of Experience, but not in relevant campaign.</td>
</tr>
<tr>
<td>Core team with 5+ years of experience</td>
<td>No Core Team. Onboarding Fresh Team Members.</td>
</tr>
<tr>
<td>English is First Language</td>
<td>Offshore Center. English is Second Language.</td>
</tr>
<tr>
<td>Using AI-Powered Speech Analytics for Reactive Performance Management</td>
<td>AI-Powered Speech Analytics for Proactive performance management:</td>
</tr>
<tr>
<td></td>
<td>• Proactive Design Training</td>
</tr>
<tr>
<td></td>
<td>• Nesting</td>
</tr>
<tr>
<td></td>
<td>• First 30 Performance Management</td>
</tr>
</tbody>
</table>
What and How?

- **Identify Critical Behaviors which derive sales using historical data**
- **Create audit form to rate agent performance for these key Behaviors**
- **Partner with T&D to conduct refresher for the agents**
- **Schedule calibration calls twice a week**
- **Daily, weekly, monthly reports to track the performance**
- **Share practical application with examples**
Correlation between Critical Behaviors and Conversion

Sales Conversion Impact

<table>
<thead>
<tr>
<th>Center Alpha</th>
<th>With Probing</th>
<th>Without Probing</th>
</tr>
</thead>
<tbody>
<tr>
<td>23.20%</td>
<td>12.60%</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Center Beta</th>
<th>With Probing</th>
<th>Without Probing</th>
</tr>
</thead>
<tbody>
<tr>
<td>32.60%</td>
<td>12.50%</td>
<td></td>
</tr>
</tbody>
</table>

- Discovery questions create opportunities to recommend additional products and services, overcome customers’ objections. It helps the agent to understand customer requirement and recommend product accordingly.

- **Examples**
  - Can you describe your current data usage for me?
  - What types of things do you use your phone for?
  - May I ask what drew your interest in this device?
  - What features are you looking for in your new phone?
Interaction Flow – Pacesetters v/s Herd

**Pacesetters**
- Assurance of Help
- Loyalty Acknowledgement
- Discover customers requirement
- Recommendation
- Assume the sale
- Buy More Save More Accessory Bundle pitch
- Offering single accessory as a rebuttal
- Protection Plan pitch with benefits
- Providing rebuttals
- Recap order
- Asking for further assistance

**Top agents believe in creating a positive first impression. They provide personalized assurance of help along with acknowledging their loyalty towards the brand.**

**Herd**
- Assurance of Help
- Asking clarification questions
- Recommendation
- Assume the sale
- Accessory pitch
- Protection Plan pitch
- Recap order
- Thank the customer for placing the order
- Asking for further assistance

**Rest of the agents are more robotic in nature, more of order takers and misses out to explore additional opportunities in their conversation.**
Predicting the Future Based on Past

A 0.25% increase in the AFS results in an increase of $0.86 in Revenue/Online Hours

Improvement by +0.5%  
AFS: 42.80%  
Forecasted Revenue: $1,886,213

Improvement by +1%  
AFS: 43.30%  
Forecasted Revenue: $1,947,507

Improvement by +2%  
AFS: 44.30%  
Forecasted Revenue: $2,070,095

Increasing the Ask for sale score by 2% will result in an increase of $245,195 Overall Revenue

Current State: 42.30  
AFS: 42.30%  
Forecasted Revenue: $1,824,900

Future State +0.5%  
AFS Adherence  
Rev/Online Hours (Forecast)

Future State +1%  
AFS Adherence  
Rev/Online Hours (Forecast)

Future State +2%  
AFS Adherence  
Rev/Online Hours (Forecast)
Cascading Effects: The Great Resignation

**Center Alpha**

- The Sustained Retention Rate is 94.20%
- Absence of brand experts because of less tenured team members.
- High expenditure on recruiting, training and onboarding.
- Leaders spending more time on WFM actions Vs Coaching action

**Center Beta**

- The 90-Day Retention Rate is 97.39%
- A proficient team of brand experts
- Low expenditure on recruiting and onboarding.
- Using Effectiveness Rating and Big Data Performance Management

Leadership

Campaign

Language

Technology
# 90-Day Retention Data

<table>
<thead>
<tr>
<th>Campaign/Site</th>
<th>Begin HC</th>
<th>Net Count</th>
<th>Term for Begin HC</th>
<th>Term within a month</th>
<th>Retention %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alpha</td>
<td>448</td>
<td>507</td>
<td>26</td>
<td>0</td>
<td>94.20%</td>
</tr>
<tr>
<td>Beta</td>
<td>230</td>
<td>227</td>
<td>6</td>
<td>0</td>
<td>97.39%</td>
</tr>
<tr>
<td>Gamma</td>
<td>521</td>
<td>591</td>
<td>27</td>
<td>0</td>
<td>94.82%</td>
</tr>
<tr>
<td>Delta</td>
<td>214</td>
<td>211</td>
<td>6</td>
<td>0</td>
<td>97.20%</td>
</tr>
</tbody>
</table>

Overall Company-wide Retention **91.89%**
Do I really need Speech Analytics?

WORKING IN A CALL CENTER IS NOT THAT TIRING

BARBARA, 29

Benchmark performance with KPIs

Move beyond quality scores, provide direct feedback for improvement

Targeted coaching & training

Involve agents in the evaluation process

Encourage Self-Learning
VOC Analysis – Overall VOC Ratings

VOC Index Score: 83%

Overall Sentiments Level 1 Call Reasons

Identified Opportunities:
1. Credit & Refund Inquiry
2. Account Suspension & Activation

Etech Insights Recommendations:
1. Provide option to reactivate closed account.
2. Train agents of assisting customers for activating accounts & take payments.
VOC Analysis – Positive & Negative Sentiment Drivers

Total Positive Sentiment Interactions: 2350 Calls

Total Negative Sentiment Interactions: 310 Calls

Received more positive sentiments because of overall assistance provided by the agents utilizing soft skills and advocacy.

- **Technology**
  - App experience: 9%
  - Website user friendly: 15%

- **Process**
  - Resolution: 17%
  - Overall Process: 26%

- **People**
  - Agent Assistance: 34%

Customers expressed negative sentiments on process because their queries were not resolved due to process limitations.

- Poor App Experience: 10%
- Poor DCX: 16%
- Agent: 23%
- Resolution Not Provided: 13%
- Overall Process: 39%

N = 3490
Customer Effort Analysis – Overall Score and Drivers

Customer Effort score = **11%** For All Interactions (40 calls)

Overall Customer Effort Ratings

- **Small Effort (1% - 10%)**
- **Medium Effort (10.1% - 30%)**
- **High Effort (30.1% & above)**

Customer Effort Drivers

- **Customer Frustration**
- **Repeat Contact**
- **Customer Confusion**
- **Long Hold**
- **Channel Switch**

I guess the frustrating part is it's not like. Okay. We have a problem now you fix it

I'm so frustrated right now and it's probably because this could destroy my business

it's annoying really it's actually annoying.

I'm getting frustrated to be honest. I've been in contact with the porting person for over a month now

I don't understand where this additional charges coming from.

tried to follow the instructions but I don't understand how to do it still.

I called yesterday the caller ID or my phone number just has. The number not the name can we change.

I already did that but I've called a 1000000 times

It's just this is super frustrating cause I've missed an important call

when I tried to log in online it says I need to contact customer support was hoping for some help

I wanted to close on the account. I tried to do it online it said I needed to call

tried to pay this online and having trouble

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Agent Effort Analysis

488 interactions (out of 3490) | 14% Interactions observed with High Agent Effort while assisting customers with their queries/concerns.

25% (122 calls) of times noticed Negative sentiments on Agent effort Calls.

Agent Effort Drivers with Negative Sentiments:
- Agent Powerless to Help: 25%
- Agent Audio Issues: 32%
- Agent Connectivity Issues: 17%

Total Calls: 25% noticed Negative sentiments on Agent effort Calls.
Great, makes sense as a leader, how do I convince my agents?

Reduce the amount of time it takes you to become a commissioned team member

You’re in control

Understand what to say and when to say it. When it’s most likely to appeal to the customer

Reduce the mental effort to become “good” at your job – learn faster with less “trial and error”

Fair and Balanced – Your ability is not gauged on a small proportion of your work
Research-backed insight library can identify most pressing issues, automatically

<table>
<thead>
<tr>
<th>Customer Experience</th>
<th>Sales &amp; Marketing</th>
<th>Customer Care</th>
<th>Products &amp; Services</th>
<th>Industry</th>
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</thead>
<tbody>
<tr>
<td>Customer sentiment</td>
<td>Discovery</td>
<td>QA</td>
<td>Product issues</td>
<td>Banking</td>
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<tr>
<td>Call effort</td>
<td>Buying reasons</td>
<td>Service</td>
<td>Orders and payment</td>
<td>Consumer products</td>
</tr>
<tr>
<td>Self-service effort</td>
<td>Agent pitch behavior</td>
<td>Resolution</td>
<td>Returns</td>
<td>Hospitality</td>
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<tr>
<td>Rep-related effort</td>
<td>Pricing</td>
<td>Agent language</td>
<td>Damage and repairs</td>
<td>Insurance</td>
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<td>Churn indicators</td>
<td>Objections</td>
<td>Compliance</td>
<td>Product inquiry</td>
<td>Publishing and media</td>
</tr>
<tr>
<td>Non-service effort</td>
<td>Agent rebuttals</td>
<td>Customer journey</td>
<td>Devices</td>
<td>Telecom</td>
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Research-backed insight library can identify most pressing issues, automatically

<table>
<thead>
<tr>
<th>Industry: Banking</th>
<th>Customer sentiment</th>
<th>Customer Care: QA</th>
<th>Products &amp; Services: Product issues</th>
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<td>Consumer products</td>
<td>Call effort</td>
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<td>Hospitality</td>
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<td>Telecom</td>
<td>Non-service effort</td>
<td></td>
<td>Devices</td>
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</table>
Prebuilt, prescriptive visualizations point to key areas of focus
Measure performance relative to industry benchmarks

• Compare where you sit versus average and top performers

• Focus efforts on the highest opportunities for improvement

• Track improvements over time
Multiple variable analysis

- Moving beyond single variable analysis opens up new perspectives on data. Measure frequency and impact:
  - What call reasons result in the most replication confusion?
  - What save offers are the most effective based on the reason a customer wants to cancel?
  - What’s driving unwanted holds and transfers that can drive up your customer’s frustration and your costs?
Every phone call matters.

Why capturing 100% of customer phone interactions improves your agents and customer experience.
50% Of workforce wants to remain remote employees

> 50-70% YOY decrease in FTEs

300% - 800% Call volume increase in enterprise contact center

Emerging Trends Across Contact Centers

- Work from Home
- Return to Work
- Gig Economy
- Vulnerable Customers
- Managing Surge

68% Increase in escalations
34% Increase in hold times
50% Increase in difficult calls

Source 1: Pindrop 7/2020, Insights from COVID Contact Center
What we hear

Limited Call Samples makes understanding why customers are calling is difficult.

QA is too manual: small samples do not provide a complete picture of performance.

Inconsistent, imprecise coaching due to lack of understanding of customers and agents.

Planning for international expansions is expensive and difficult.

Intelligence is the key to valuable insights.

What we did?

Optimize the Speech Engine for speed, accuracy and scale.

Build an open, flexible, accurate AI engine to transcribe all calls.

Specialize in accurate contact center specific AI models for speech analytics.

Reduce complexity to improve ASR cost of operation, speed, and deployment (cloud and on-prem).

Improve and enrich the transcriptions with intelligence like tone based emotion, redaction, music detection.
Simplifying around customer service objectives

**Reduce Call Volume, Handle Time, Increase FCR**
Identify call reasons and understand drivers of long, transferred, escalated, or unresolved calls

**Identify Self Service Opportunities**
Pinpoint specific areas for digital improvement and route to action takers based on self-service attempts and failures

**Improve QA Efficiency**
Score every call to augment manual QA to deliver advisor competency reports at an individual, team, or org level

**Streamline Analysis to Improve Overall CX**
Integrate speech insights with multi-channel feedback at scale to prioritize, address, and rapidly respond to customer pain points
Transforming Scores to Insights

Omnichannel Integration → Data Processing & Analytics → Actionable Insights

Dialer → Audio → Email → Chat → Text → CRM → Survey

Performance Recommendation to Agent
Coaching Recommendations for Supervisors
Automated Training Assignment
Real-Time Alerts
Tailored Dashboards
Sentiment Analysis
Coaching Effectiveness Module
Real-Time Reporting
VOC Analysis
Business Insights
Utilizing Data in Day-to-Day Life

• You need FUNCTIONAL expertise, and not AI expertise to turn your insights, ACTIONABLE.

• Complex challenges are not Reporting.

• Complex and bad data destroys the integrity, introduces risk and promotes bad/inaccurate decision making

• Does your data tell a story, is it consumable and usable at every level of organization?
Etch’s Secret Sauce: Artificial Intelligence + Human Intelligence

- Preventing blind spots that leads to **Silo Reporting**

- Data models with very specific customizable metadata equals surgical output.

- Translating the data in an **intuitive, easy to use and understand UI format, visualization that is easy to access and ACTIONABLE**.
Integrated Agent Coaching

Performance Monitoring

- Quality Scores
- Long training sessions
- Finding challenges
- Evaluating a sample of calls

Technology

1. Encourage Self-Learning
2. Gamification & Example Based Learning
3. Analytics for Coaching Insights
4. Real-Time Automated Coaching Programs
5. Measure Coaching Effectiveness

Performance Management

- Direct Feedback
- Targeted coaching
- Identifying opportunities
- Scalability - Evaluating 100% of customer interactions
How do I fix my retention?

Why is coaching crucial in 2022?

- Move beyond the traditional approach of ‘Sampling’ – Mine all data
- ‘CX’ is the key differentiator
- Ever-evolving customer behavior
- Millennials and Generation Z becoming major part of customer base
- Reducing attrition & retaining talent
- Changing market dynamics
- Team Upskilling

Source: Smarter call-center coaching for the digital world
Don’t Coach the Call, Coach the Skill

Goal Setting
Set objectives and goals for the entire organization

Analyzing Data
Analyze your data & establish baseline measurements

Prioritizing ROI
Prioritize your initiatives based on their ROI

Awareness
Empower your teams by creating awareness about speech analytics

Plan of Action
Develop a plan of action to put your findings to use across the organization

Cross-Functional Collaboration
Ensure collaboration across the enterprise

Read detailed blog

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Ask the Experts...

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