# TelXL

Customer Insight Manager Report

TelXL's Strategic Recommendations for Customer Service Optimization through Advanced Digitalization
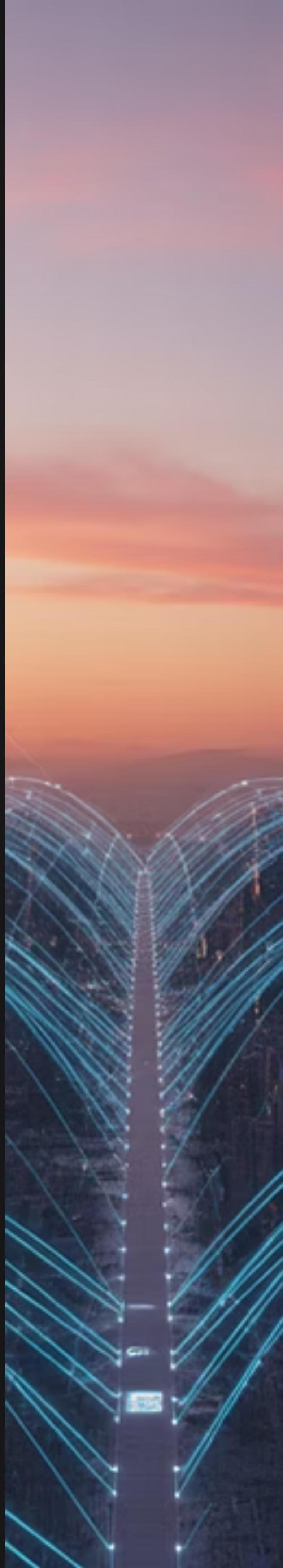
Monthly Teams Report

This report provides actionable insights into strengths, improvement areas, and strategic coaching recommendations to enhance overall team performance.

Team A Summary

This comprehensive monthly performance review analyses Team A's quality metrics, operational efficiency, and individual agent contributions.

Overview Metrics

1

Team A comprises 9 agents who collectively handled 686 calls throughout August, demonstrating consistent quality across multiple performance dimensions.

2

- Total Agents: 9
- Total Calls: 686
- Average Business QA: 93%
- Average Compliance QA: 71%
- Average Customer Experience QA: 94%
- Average Total Score: 92%

The team shows particular strength in customer experience and business quality, with compliance representing the primary opportunity for development.

93%
Business QA

+1% improvement

71%
Compliance QA

+1% improvement

94%
Customer Experience

Maintained excellence

92%
Total Score

+1% improvement

Team Performance Stats

Agent Name	Rank	Calls	Business QA	Compliance QA	Customer Exp. QA	Total Score	Trend	Rank Δ
Muttiah Muralitharan	1	55	99%	87%	99%	98%	+1	+5
Brian Lara	2	103	90%	83%	90%	90%	−2	−1
Shane Warne	3	153	87%	71%	87%	85%	+1	+1
Anil Kumble	4	104	94%	74%	94%	92%	+1	+1
Virat Kohli	5	72	94%	78%	95%	93%	0	+2
Ricky Ponting	6	118	91%	71%	94%	91%	−1	−3
Michael Clarke	7	56	96%	73%	96%	94%	−4	−5
Yuvraj Singh	8	15	100%	73%	98%	96%	+14	0
Jacques Kallis	9	10	90%	30%	95%	86%	−2	0

Performance Summary

Team A demonstrated solid overall performance this month, with average total scores improving by 1% to 92%. Business QA and Compliance QA saw modest gains of 1%, whilst Customer Experience QA remained steady at an excellent 94%. The workload distribution is fairly balanced, with call volumes ranging from 10 to 153 per agent.

Notably, **Muttiah Muralitharan** leads the team with a 98% total score and a significant positive ranking change (+5), whilst **Yuvraj Singh** showed the largest positive trend (+14) despite handling a smaller call volume. Conversely, Michael Clarke experienced a notable decline (−4 trend, −5 ranking), warranting focused attention. The team demonstrates consistent strengths in professionalism and communication, though some agents face challenges in compliance and verification protocols.

Team Strengths & Improvement Areas

Professionalism
Consistent professionalism and polite call closure across all agents

Empathy
Strong empathy and rapport building with customers

Clear Communication
Avoidance of jargon in most customer interactions

Call Efficiency
Efficient call flow and confident handling of enquiries

Areas for Improvement

Caller Verification Compliance
Verification compliance remains inconsistent with multiple failures noted across the team

Summarisation Standards
Confirmation of next steps needs improvement for clarity and consistency

Complex Call Handling
Claims, disputes, and complaints require enhanced empathy and communication skills

Technical Clarity
Reducing jargon and improving clarity in complex or technical conversations

High-Scoring Topics

- Billing & Payments
- Policy Management
- Customer Service Enquiries
- Claim Status Updates
- Payment Setup or Change

Low-Scoring Topics

- Claims & Incidents
- Complaint Handling
- Dispute Claim Outcome
- Policy Cancellation
- Caller Verification

Key Observation: The team maintains strong customer experience scores and professionalism, reflecting effective rapport building and clear communication. Incremental improvements in compliance indicate progress but highlight ongoing gaps. Ranking shifts suggest emerging high performers and areas needing targeted support. Continued focus on verification and summarisation will be critical to sustain quality and compliance.

Coaching Focus & Recommendations

Priority Coaching Areas
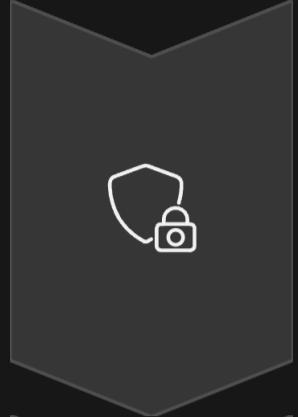
Caller Verification Compliance

Conduct role-play scenarios emphasising verification protocols and confirmation of caller identity
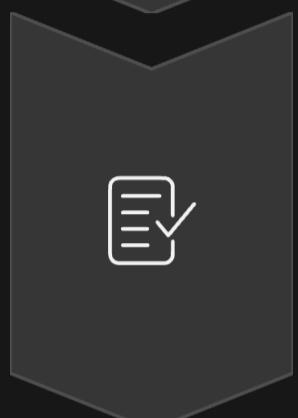
Summarisation & Next Steps

Review recent calls with missed summarisation to identify gaps and practise effective call closure techniques
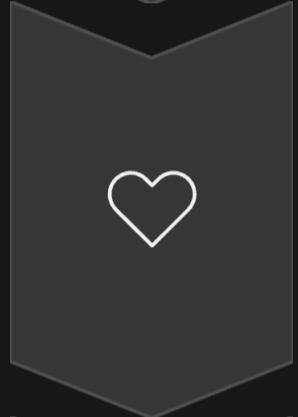
Empathy in Complex Calls

Paired coaching sessions focusing on empathetic language, de-escalation techniques, and managing emotional callers
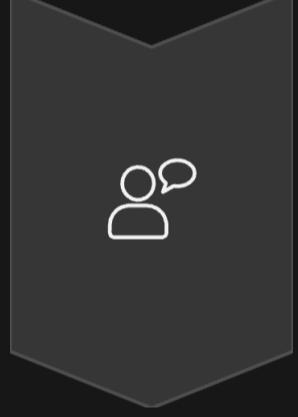
Communication Clarity

Workshops on simplifying complex information and avoiding jargon to improve clarity and customer understanding

Strategic Recommendations

1

Compliance Enhancement

Implement regular compliance drills and verification protocol refreshers to improve adherence and reduce failures across the team

2

Peer Learning Programme

Establish peer review and paired coaching sessions to reinforce summarisation skills and empathy in complex call scenarios

3

Communication Workshops

Develop targeted workshops addressing jargon reduction and clarity in communication, especially for complex topics and technical discussions

4

Workload Optimisation

Monitor call distribution to ensure balanced workloads and provide additional support to agents with declining performance trends

Sales Performance Report

A comprehensive analysis of sales performance metrics, reasons for No Sales & Conversion metrics

Executive Summary

1 Key Performance Indicators

- **Conversion Rate:** 39%
- **Primary Objection:** Price Objection
- **Sales Effectiveness:** 39%

2 Conversion Likelihood

- High 32% — 32 calls
- Medium 14% — 14 calls
- Low 15% — 15 calls

3 Top No-Sale Reasons

- **Other** — 30%
- **Too expensive** — 25%
- **Quote review** — 15%

In July 2024, the outbound sales campaign conducted 100 calls, achieving an estimated conversion rate of 39%, reflecting stable performance compared to the prior period. High likelihood leads comprised over half of the sales calls, indicating strong targeting effectiveness. Key challenges remain around price objections and cost concerns, which are the most frequent barriers to closing sales. Overall, agent communication and rapport building are strengths, supporting consistent engagement with prospects.

Sales Effectiveness Summary

Attribute	Yes %	No %	Trend vs Last Month
Effective Communication	83.6	13.1	↑
Rapport Building	88.5	8.2	↑
Closing Techniques	44.3	27.9	↓
Follow–Up Plan	72.1	26.2	→
Objection Handled	67.2	13.1	→
Product Knowledge	86.9	6.6	↑
Areas for Agent Improvement Identified	62.3	8.2	→

🗌 **Observation:** Sales effectiveness remains solid with a 39% conversion rate, supported by high scores in effective communication (83.6%) and rapport building (88.5%). However, closing techniques lag at 44.3%, suggesting a bottleneck in sealing deals despite strong initial engagement. Follow–up planning and objection handling show room for improvement, with success rates at 72.1% and 67.2% respectively, indicating opportunities to better align QA coaching with sales outcomes.

Sale Likelihood Analysis

High	Medium	Low
32 calls	**14 calls**	**15 calls**
52.5% of sales calls	23% of sales calls	24.6% of sales calls
↑ Trend vs Last Month	→ Trend vs Last Month	↓ Trend vs Last Month

No-Sale Reasons

Reason	Count	% of No Sales Calls
Other	18	29.5%
Too expensive	15	24.6%
Quote review	9	14.8%
Renewal or contract date	6	9.8%
Eligibility	6	9.8%
Technical	3	4.9%
No Budget / Financial Constraints	2	3.3%
Shopping around	1	1.6%
Self-service preference	1	1.6%

Observation: The leading reasons for no-sale outcomes are categorised as 'Other' (29.5%), 'Too expensive' (24.6%), and 'Quote review' (14.8%), highlighting pricing and decision-making delays as primary barriers. Recurring themes around cost and timing suggest targeted training on value articulation and follow-up persistence could reduce lost opportunities. No new or emerging no-sale patterns were identified, indicating consistent challenges that can be addressed through focused process improvements.

Objection Type Distribution

Category	Occurrences	% of Sales Calls	Handling Success Rate
Price Objection	15	24.6%	66.7%
Timing/Defer	10	16.4%	80%
Not Applicable	9	14.8%	0%
Pricing Query	6	9.8%	100%
Price Variation	6	9.8%	100%
Need More Information	4	6.6%	100%
Status Quo	3	4.9%	33.3%
Past Bad Experience / Distrust	2	3.3%	50%
Budget Constraint	2	3.3%	100%
Not Relevant / Wrong Fit	2	3.3%	50%
Internal Approval	2	3.3%	100%

🗒 **Observation:** Price objections are the most common, appearing in 24.6% of calls, with a moderate handling success rate of 66.7%. Other frequent objections include timing/defer (16.4%) and not applicable (14.8%), the latter showing zero handling success and representing a critical area for improvement. High success rates in handling pricing queries and price variation objections (100%) demonstrate agent capability when equipped with the right information. Addressing price sensitivity and improving strategies for less successful objection categories will be key to increasing conversions.

Coaching & QA Opportunities

Enhancing Closing Techniques

Improve deal finalisation rates by addressing the bottleneck in closing techniques (44.3% success rate)

Improving Objection Handling

Focus especially on 'Not Applicable' scenarios and price-related concerns to boost conversion rates

Strengthening Follow-Up Planning

Reduce lost opportunities due to timing and quote review delays through structured engagement protocols

Recommendations

01

Implement Targeted Role-Playing Sessions

Focus on closing strategies and overcoming price objections through realistic simulation exercises

02

Develop Objection Handling Playbooks

Create tailored responses for low-success categories with proven frameworks and scripts

03

Introduce Structured Follow-Up Protocols

Implement tracking systems to ensure timely engagement post-call and reduce lost opportunities

Issue Resolution Deep Dive

This comprehensive analysis examines contact centre performance, identifying systemic barriers to first-contact resolution and providing actionable recommendations to enhance customer experience and operational efficiency.

Executive Summary

Analysis Overview

1,314 calls were analysed, revealing significant challenges in first-contact resolution driven primarily by rigid policy frameworks and operational fragmentation.

Unresolved cases were dominated by **systemic upstream causes (49%)** and **agent downstream issues (21.3%)**, highlighting the dual impact of policy constraints and operational execution gaps.

Policy Simplification

Streamline documentation and authorisation requirements to empower agents with greater discretion for immediate resolution.

Cross-Departmental Coordination

Implement integrated workflows and real-time communication tools to eliminate handoff delays and team unavailability issues.

Customer Education

Launch proactive communication initiatives to reduce confusion around claims processes and documentation requirements.

IT System Upgrades

Stabilise critical platforms including email delivery and payment processing to ensure seamless information flow and reduce technical disruptions.

Agent Empowerment

Enhance training programmes and decision-making authority supported by clear escalation protocols to reduce excessive transfers and callbacks.

Unresolved calls were predominantly driven by **stringent process and policy limitations**, accounting for over three-quarters of cases and significantly constraining agents' ability to resolve issues on first contact. Business process breakdowns, including coordination failures and communication gaps between teams and external parties, further contributed to delays and customer dissatisfaction. Customer-related factors and system issues played a smaller but meaningful role, often compounding resolution challenges. Persistent policy rigidity and interdepartmental misalignments remain key barriers to improving overall CX performance.

Detailed Upstream Themes Analysis
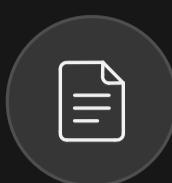
## Process/Policy Limitation

503 cases | 78.1%

Strict requirements for documentation, authorisations, and payment processes limit agents' ability to resolve issues promptly, often requiring customers to complete multiple steps independently.

Impact: Policy constraints on resolution capabilities

Business Process Breakdown

97 cases | 15.1%

Delays and unresolved issues arise from unavailability of claims teams, poor coordination between departments, and ineffective communication with external parties such as repairers and solicitors.

Impact: Operational coordination failures
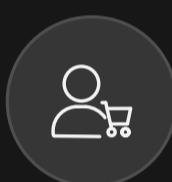
Customer-Related Factors

29 cases | 4.5%

Customer confusion, incomplete information, and lack of awareness about required documents or processes contribute to delays and unresolved calls.

Impact: Customer information gaps

Product/System Related Issues

15 cases | 2.3%

Technical failures in email delivery, payment processing, and online claim submission systems disrupt communication and prevent timely resolution.

Impact: System and technology failures

Key Observation

The upstream analysis reveals a layered challenge where **rigid policies create primary barriers**, compounded by fragmented internal processes and occasional customer-side information deficits. System limitations further exacerbate delays, indicating a need for integrated solutions that address both policy flexibility and operational agility.

Final Agent Actions: Behavioural Patterns and Constraints

1 — Guidance Provided

240 cases | 37.3%

Agents frequently provided detailed instructions and explanations regarding claims processes, policy limitations, and next steps, aiming to empower customers despite unresolved issues.

Strong procedural adherence but limited empowerment

2 — Follow-up Actions/Message Passing

156 cases | 24.2%

Agents often committed to callbacks, message passing, and coordination with other teams to progress unresolved issues.

Frequent callbacks delay immediate resolution

3 — Information/Documentation Sent

113 cases | 17.5%

Sending emails with forms, payment links, and policy details was a common agent action to facilitate customer follow-up and documentation submission.

Relies heavily on customer follow-through

4 — Call Transfers

72 cases | 11.2%

Calls were regularly transferred to specialised teams or supervisors when agents lacked authority or information to resolve issues directly.

Repeated transfers delay resolution

5 — Schedule Future Action

38 cases | 5.9%

Agents scheduled callbacks and follow-ups to manage unresolved issues, often due to unavailable resources or pending information.

Callbacks manage workload but extend resolution time

Critical Observation

Agent behaviours reflect a strong focus on procedural compliance and customer guidance but limited empowerment to resolve issues on first contact. High reliance on follow-ups, transfers, and documentation requests indicates systemic constraints and operational fragmentation impacting agent effectiveness.

Call Volume Trends: Subcategory Analysis

The following analysis tracks month-over-month changes across key contact subcategories, revealing shifting demand patterns and emerging operational priorities.

Subcategory	Last Month	Last Month %	Current Month	Current %	Count Change	Change %
Submit/Request Claim Documentation	65	9.1	72	11.2	+7	+23%
Claim Status Update	248	34.5	195	30.3	−53	−12%
Payment Setup or Change	20	2.8	22	3.4	+2	+21%
Premium Breakdown Explanation	24	3.3	26	4.0	+2	+21%
Request for Certificate of Insurance	1	0.1	3	0.5	+2	+400%
Invoice or Receipt Request	1	0.1	2	0.3	+1	+200%
Policy Cancellation	23	3.2	22	3.4	−1	+6%
Complaint About Claim	10	1.4	12	1.9	+2	+36%
Add/Remove Vehicle or Driver	8	1.1	8	1.2	0	+9%
Dispute Claim Outcome	83	11.6	65	10.1	−18	−13%
Policy Renewal Request	9	1.2	16	2.5	+7	+108%
Change of Personal Details	8	1.1	12	1.9	+4	+73%
Lodge a New Claim	157	21.9	126	19.6	−31	−11%
Payment Failure or Refund Request	27	3.8	33	5.1	+6	+34%
Update Coverage Details	1	0.1	8	1.2	+7	+1100%

Notable Increases

Update Coverage Details saw an extraordinary 1,100% increase, whilst **Policy Renewal Requests** surged by 108%, indicating growing customer engagement with policy modifications.

Volume Reductions

Claim Status Updates decreased by 12% and **Lodge a New Claim** dropped by 11%, suggesting potential improvements in proactive communication or seasonal variation.

Emerging Concerns

Complaints About Claims increased by 36% and **Payment Failures** rose by 34%, highlighting areas requiring immediate operational attention and process refinement.