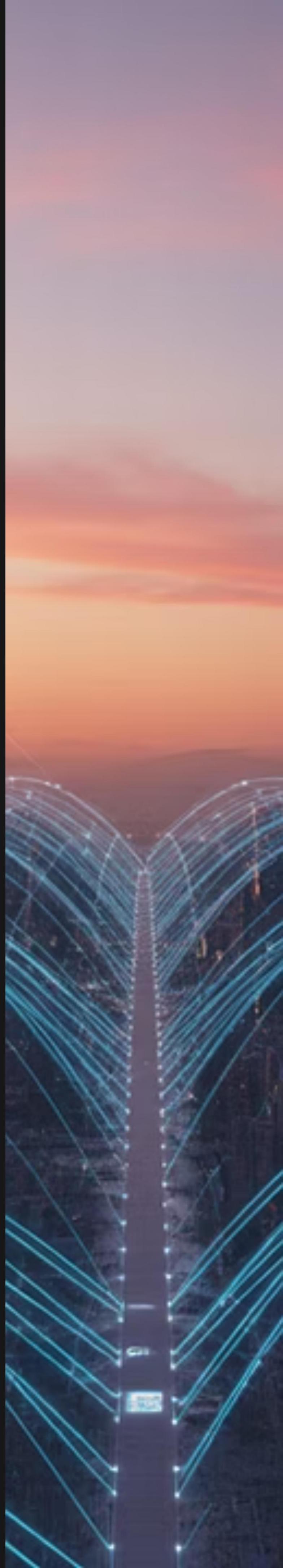




# Customer Insight Executive Report

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



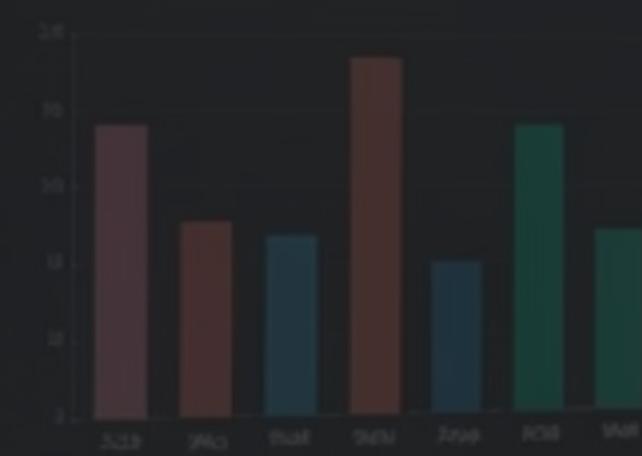
# Executive Team Report

A comprehensive analysis of the Key Performance Metrics across the Contact Centre for the C Suite

Conversion Rate



Forecast



# Team Performance Stats

Team A and Team B are neck-and-neck, both achieving a 90% total score with strong Business QA (92%) and Customer Experience QA (92% and 91%, respectively). Team B slightly outperforms in Compliance QA (76% vs. 75%). Neither team showed month-over-month score changes, but Team A improved its ranking by one position, whilst Team B dropped by one. No major shifts were observed, indicating stable but plateaued performance. Compliance QA remains the weakest link for both teams, suggesting a shared area for focused improvement.

Team	Rank	Total Calls	Business QA %	Compliance QA %	Customer Exp. QA %	Total Score %	Trend	Rank Change
Team A	1	690	92%	75%	92%	90%	0	+1
Team B	2	624	92%	76%	91%	90%	0	-1

## SCOPE & METHODOLOGY

### Best Agents Comment

- Top agents consistently demonstrate strong empathy, active listening, and clear communication, which drive higher Customer Experience QA scores and foster positive customer interactions.
- They maintain high compliance adherence, particularly in caller verification and call closure protocols, contributing to improved regulatory alignment and reduced business risk.
- These agents exhibit confidence and efficiency in call flow management, enabling effective handling of complex enquiries and ensuring call resolution clarity.
- Their behaviours positively influence team culture by setting performance benchmarks and providing models for coaching and peer learning.

# Strengths & Areas for Improvement

## Strengths

- Consistent professionalism in greetings and call closures across teams enhances customer trust and satisfaction.
- Strong active listening skills and empathy contribute to positive customer rapport and higher CX QA scores.
- High adherence to Business QA standards reflects effective call handling and operational knowledge.
- Clear communication with avoidance of jargon supports customer understanding and reduces call escalations.
- Efficient call flow management enables timely resolution and improved agent confidence.

## Areas for Improvement

- Inconsistent caller verification compliance remains a critical risk area, requiring immediate attention to prevent regulatory breaches.
- Empathy and rapport building show variability, especially in complaint and dispute calls, impacting customer satisfaction.
- Summarisation and confirmation of next steps are often missed or unclear, leading to unresolved issues and repeat contacts.
- Handling of complex claims and cancellation calls needs enhanced training to improve agent confidence and call outcomes.
- Communication clarity under technical or policy complexity requires reinforcement to avoid misunderstandings.

## High-Scoring Topics

- Billing & Payments
- Policy Management (non-cancellation related)
- Claim Status Update
- Lodge a New Claim
- Submit/Request Claim Documentation

## Low-Scoring Topics

- Dispute Claim Outcome
- Complaint About Claim
- Policy Cancellation
- Claims & Incidents with Technical Issues
- Complaints & Risk Management

# Coaching Focus

Skill Area	Action
Caller Verification Compliance Summarisation & Next Steps Communication	<ul style="list-style-type: none"><li>Implement centralised QA refresher sessions emphasising verification protocols and effective call closure techniques.</li><li>Conduct role-play workshops simulating complex claims and complaint scenarios to practise clear summarisation and compliance adherence.</li></ul>
Empathy & Rapport Building Handling Complex and Complaint-Related Calls	<ul style="list-style-type: none"><li>Deliver targeted empathy training focusing on de-escalation and emotional intelligence in challenging interactions.</li><li>Establish peer coaching and call review sessions to reinforce best practices in managing disputes and sensitive topics.</li></ul>

## Recommendations

01

Scale best practices from top-performing agents by formalising mentorship programmes and sharing success behaviours organisation-wide.

02

Close compliance gaps through mandatory verification training, enhanced monitoring, and real-time feedback mechanisms.

03

Standardise call summarisation protocols to ensure consistent confirmation of next steps and reduce repeat contacts.

04

Invest in specialised coaching for complex call handling, focusing on empathy, communication clarity, and call flow efficiency.

## Summary

Performance outcomes correlate strongly with call topics: routine and well-understood areas like billing and policy management yield higher QA scores, reflecting agent confidence and process clarity. Conversely, complex or sensitive topics such as disputes, complaints, and cancellations consistently score lower, highlighting systemic challenges in empathy, compliance, and communication. These patterns suggest targeted coaching and process improvements in handling difficult call types will drive meaningful quality gains.





# Executive Summary

95.9

31.9

20.2

1260

CSAT Score

Customer satisfaction  
remains consistently  
high

NPS Score

Net Promoter Score  
showing positive trend

Net Sentiment

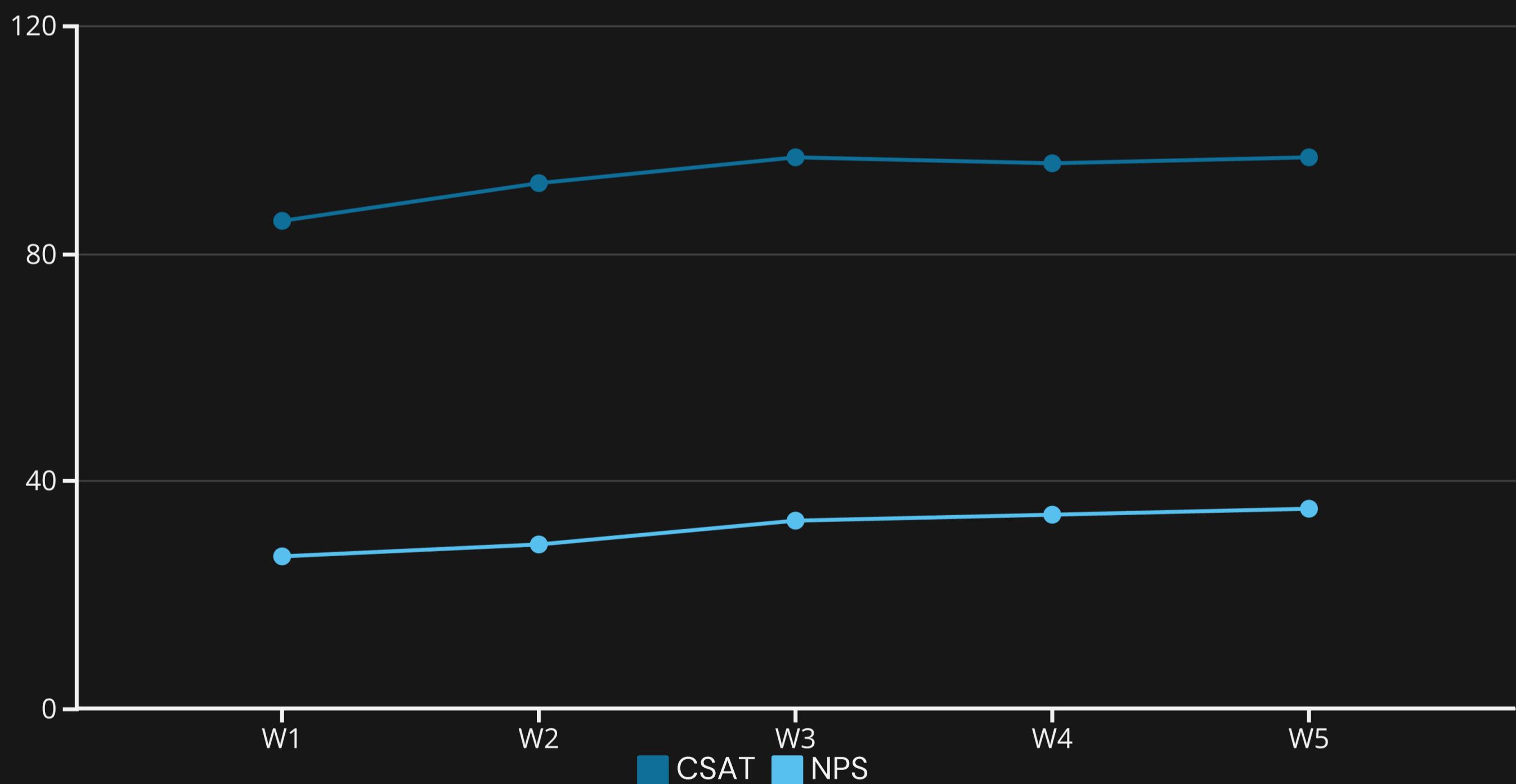
Overall customer  
sentiment indicator

Total Calls

Customer interactions  
processed in August

In August, customer experience metrics demonstrated a consistently positive trend across CSAT, NPS, and Net Customer Sentiment, with CSAT holding steady at a high 95.9% satisfaction and NPS showing moderate promoter levels around 31.9%. Key drivers of satisfaction centred on claims processing and customer service interactions, whilst billing and policy cancellation topics emerged as areas requiring attention. Despite strong overall sentiment, NPS scores indicate opportunities to deepen customer loyalty, particularly by addressing repeat negative experiences linked to billing and servicing issues.

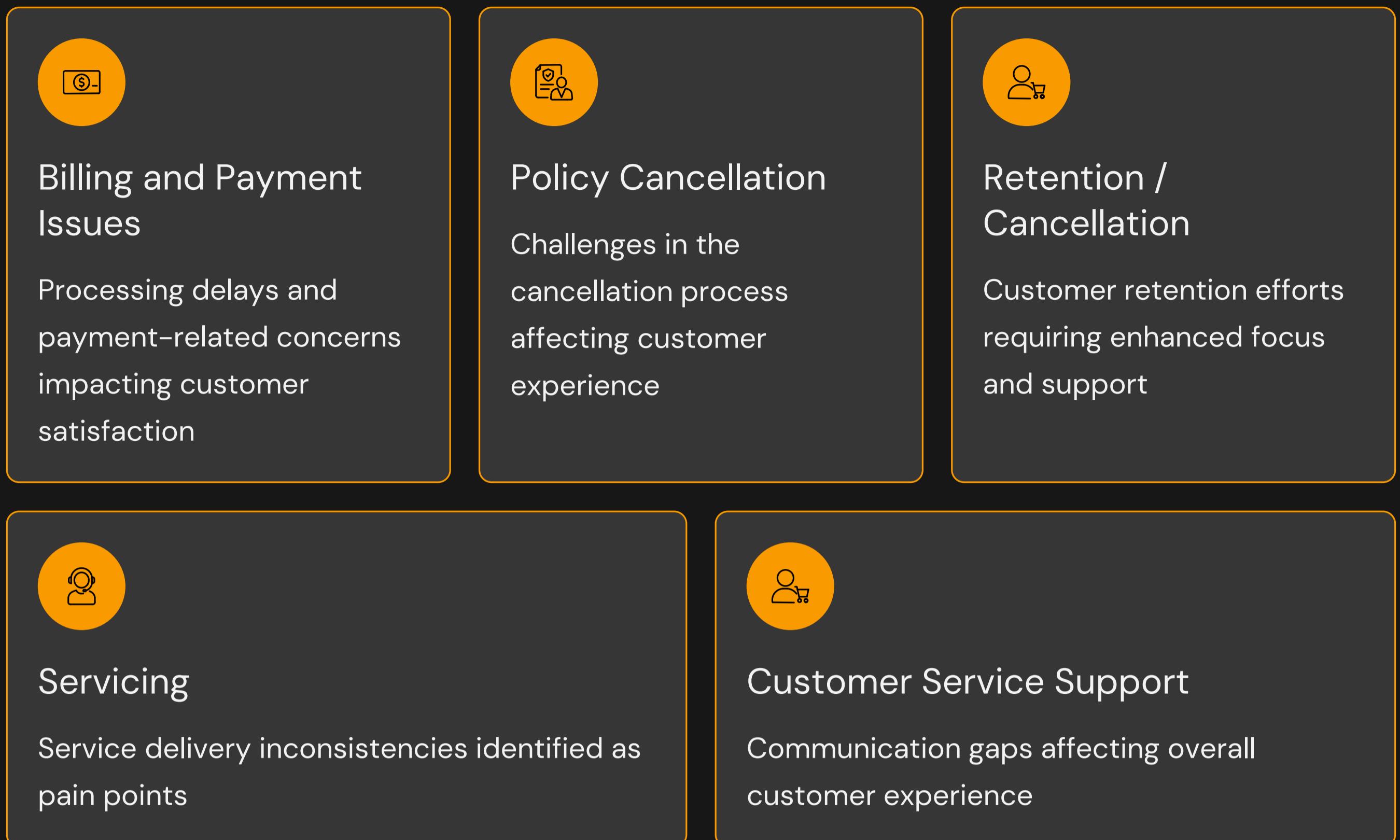
## Weekly Performance Trends



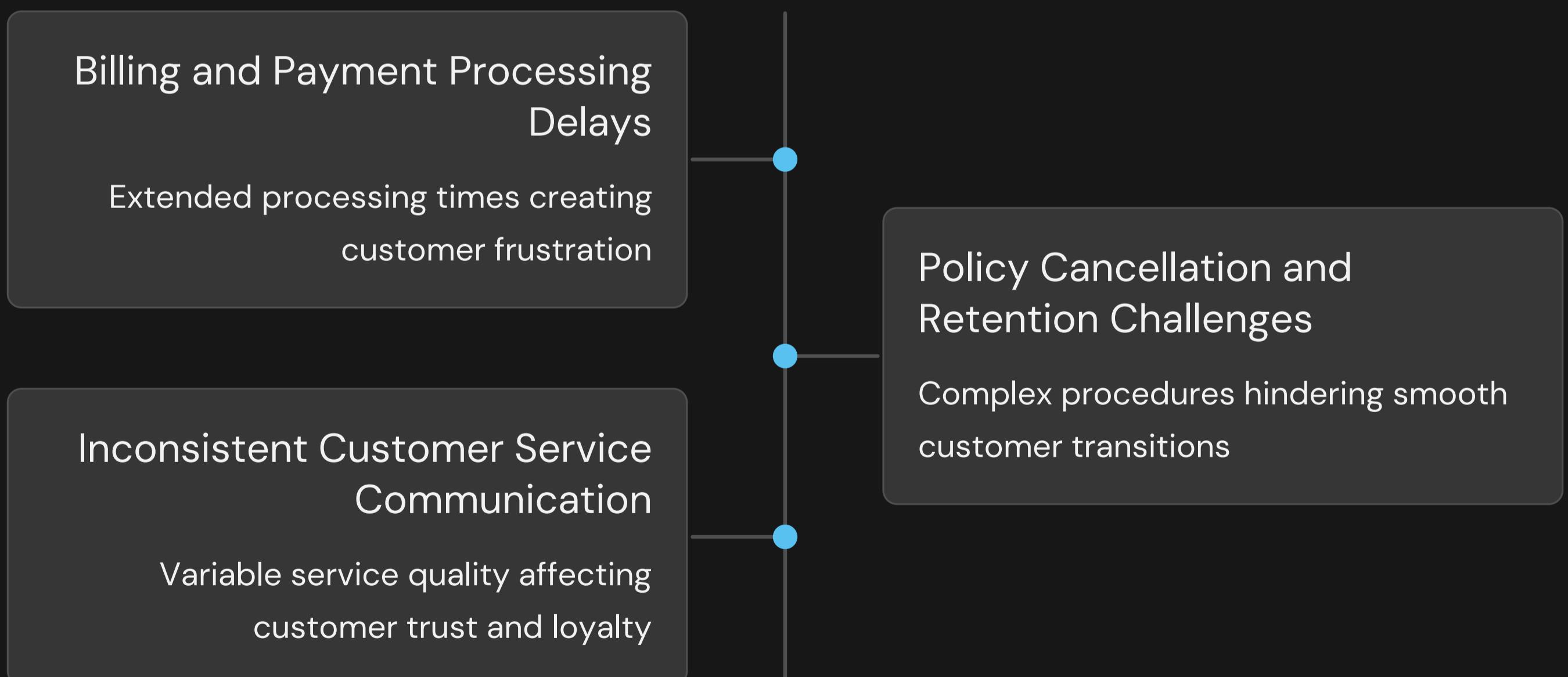
All metrics maintained positive trends throughout August, with consistent performance across all five weeks. The slight reduction in Week 5 call volume reflects the shorter reporting period at month-end.

# CX Performance Insights

## Low Satisfaction or NPS Areas



## Drivers of Negative Experience



- Whilst CSAT remains robust, the gap between high satisfaction and moderate NPS suggests that customers are satisfied with immediate interactions but hesitant to recommend, largely due to billing and policy-related frustrations. Addressing these pain points is critical to converting satisfaction into loyalty and advocacy.



# Recommendations

---

1

## Enhance Call Handling Protocols

Implement targeted empathy scripting focused on billing and policy cancellation enquiries to reduce customer frustration and improve NPS scores. Train frontline staff on de-escalation techniques and empathetic communication strategies.

---

2

## Implement Follow-Up Process

Establish a systematic follow-up process for customers reporting billing or servicing issues to ensure resolution and increase repeat contact satisfaction rates. Create accountability measures to track resolution effectiveness.

---

3

## Invest in Workflow Automation

Strategically invest in workflow automation for claims and billing processes to reduce delays and errors, aiming to improve overall customer sentiment and loyalty. Prioritise high-impact areas identified in the risk analysis.

### Implementation Priority

These recommendations should be implemented in sequence, with call handling protocols as the immediate priority, followed by follow-up processes, and automation investments as a longer-term strategic initiative. Regular monitoring of impact on CSAT, NPS, and sentiment scores will be essential to measure success.

Report Overview

Solutions

# Digitalization Report

This comprehensive report examines customer service automation opportunities, analysing 2,333 calls to identify deflection potential and operational efficiency gains through strategic digitalization initiatives.

Overall Estimate

43.15

02%

C: 25.500

Service Satisfaction

4200

43

C: 18.600

Rapid Response

8.00%

4.50%

59

C: 05.395.000

# Executive Summary

2333

5

50%

97

Total Calls

AVG Duration

Deflection Rate

Hours Saved

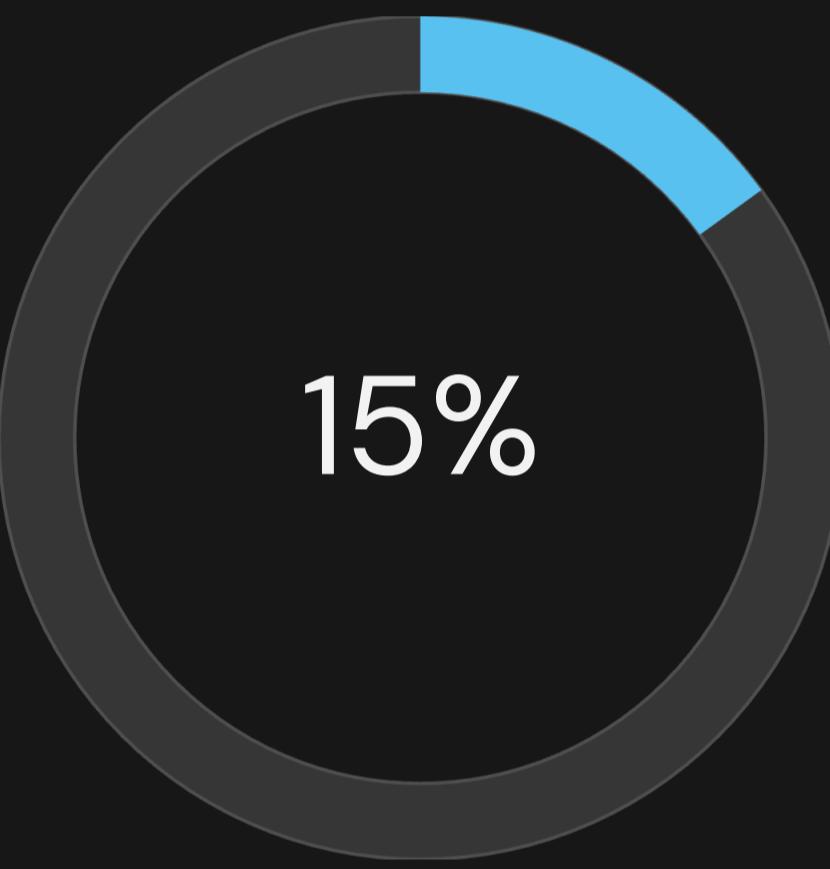
Analysed across all categories

Minutes per call

Automation potential achieved

Monthly efficiency gain

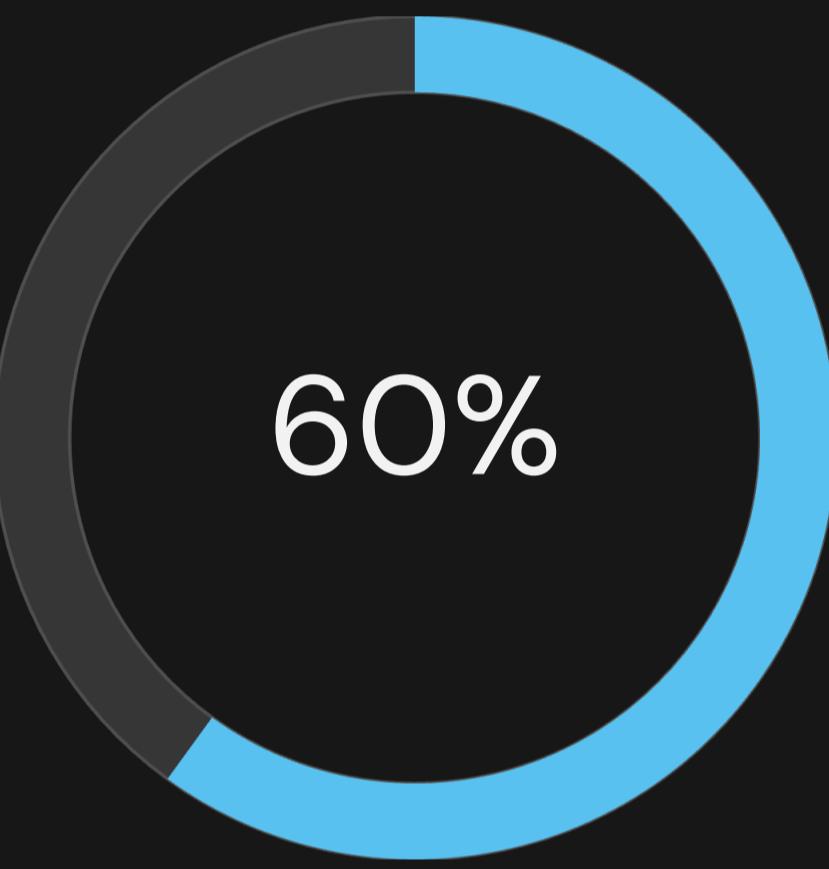
Approximately 50% of customer service calls are automatable with a hybrid approach, enabling significant deflection and operational efficiency gains.



15%

Short Term

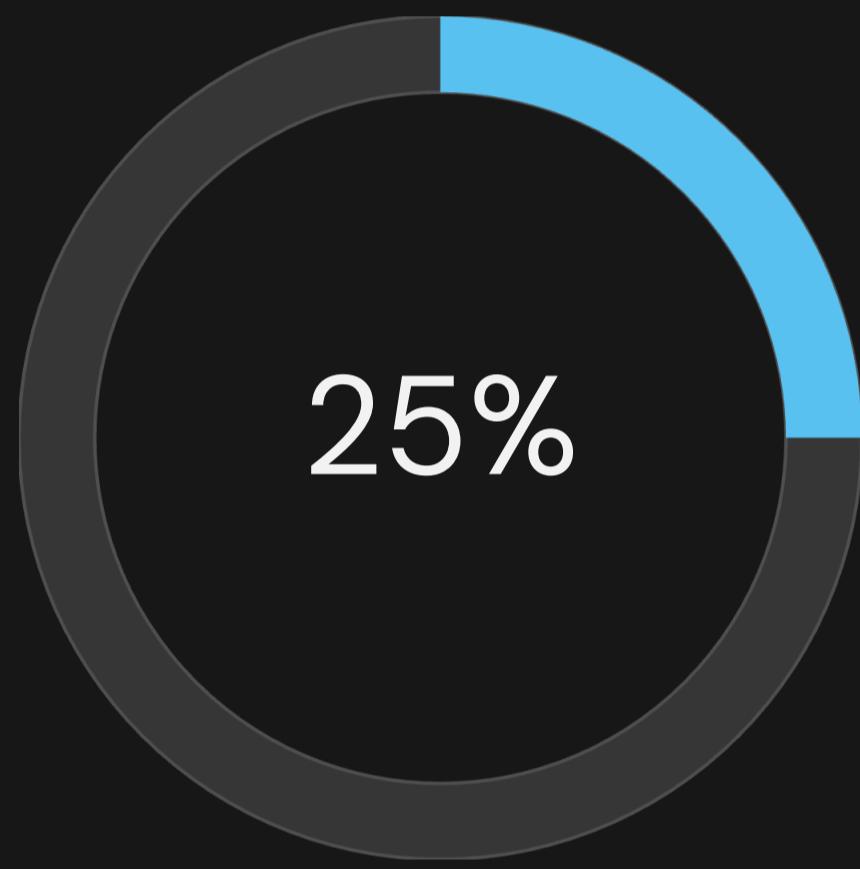
Quick wins deployment



60%

Medium Term

Core automation rollout



25%

Long Term

Complex integration phase

## Analysis Framework

Our comprehensive evaluation examined 20 categorized call types spanning claims processing, billing enquiries, policy servicing operations, and dispute resolution. Each category underwent rigorous assessment to determine automation viability and deflection potential.

The methodology incorporated multiple evaluation criteria including call volume patterns, average handle time metrics, interaction complexity levels, data access requirements, and resolution outcome analysis.

## Assessment Criteria

- Call volume and frequency patterns
- Average handle time per interaction
- Complexity and escalation requirements
- Data integration and access needs
- Resolution outcomes and success rates
- Automation scores and feasibility
- Deflection estimates by category

# Key Opportunity Areas

Category	Volume	Avg Automation Score	Avg Deflection %
Claim Status Update	820	6	50%
Lodge a New Claim	464	6	50%
Submit/Request Claim Documentation	420	6	50%
Policy Cancellation	163	6	58%
Dispute Claim Outcome	140	5	35%

## High-Volume Automation

Claim Status Update and Lodge a New Claim demonstrate strong automation potential through multi-turn voice bots, effectively handling routine enquiries and status updates with minimal human intervention.

## Straightforward Processing

Policy Cancellation and Payment Setup calls are largely procedural and straightforward, making them ideal candidates for early-phase automation deployment with high success rates.

## Hybrid Approach

Complex dispute resolution and document submission calls require sophisticated hybrid models incorporating seamless live agent escalation to maintain service quality whilst maximising efficiency.

A hybrid automation strategy can deflect approximately **50%** of calls, saving roughly **97** agent hours monthly.

# Rollout Roadmap

## Short-Term (15% of calls)

### Focus Areas:

- Automate straightforward billing enquiries and policy cancellations using data-lookup IVR and voice bots
- Deploy FAQ chatbots for common procedural questions and payment failure notifications
- Concentrate on quick wins with low complexity and high deflection ratios
- Establish foundational automation infrastructure

## Medium-Term (60% of calls)

### Focus Areas:

- Automate high-volume claims status and new claim lodgement calls with sophisticated multi-turn voice bots
- Integrate backend data systems for real-time claim status, payment verification, and document tracking capabilities
- Implement seamless live agent escalation protocols for complex or unresolved cases to maintain service quality standards
- Scale automation across core customer service functions

 **Prioritisation Rule:** Volume  $\times$  Automation Score  $\times$  Deflection Ratio, weighted by complexity and integration feasibility to ensure optimal resource allocation and maximum impact.



# Channel Recommendations

Strategic channel selection optimises automation effectiveness whilst maintaining service quality. Our analysis identifies optimal primary and secondary channels for each call type based on complexity, volume, and customer experience requirements.

## Claim Status Update

**Primary:** Multi-Turn Voice Bot | **Secondary:** Hybrid

High-volume calls with mixed complexity. Voice bots handle routine status checks, payment confirmations, and procedural FAQs, whilst complex cases escalate to live agents. Deflects approximately 50% of call volume.

## Lodge a New Claim

**Primary:** Multi-Turn Voice Bot | **Secondary:** Hybrid

Automated data verification and document collection for straightforward claims. Complex cases involving liability disputes or multiple parties require human intervention through seamless escalation protocols.

## Submit/Request Claim Documentation

**Primary:** Multi-Turn Voice Bot | **Secondary:** Hybrid

Handles document submission requests, status follow-ups, and process enquiries. Backend integration enables automated status checks whilst maintaining quality for complex interactions requiring human expertise.

Moderate automation scores and substantial call volumes indicate strong viability with strategic implementation. The hybrid approach combining automated self-service with live agent escalation maximises deflection whilst preserving customer satisfaction for complex scenarios.



# KPI & Benefit Tracking



## Deflected Call Volume

Monthly tracking of successfully automated interactions



## Agent Hours Saved

Quantified efficiency gains per month



## Cost Savings

Financial benefits from deflection



## Customer Satisfaction

NPS scores and feedback metrics



## Containment Rates

Automation success and escalation patterns

## Next Steps



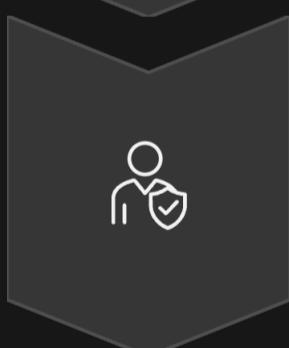
### Prioritise High-Volume Intents

Focus on claim status and lodgement calls



### Develop Voice Bots

Build multi-turn conversation capabilities



### Integrate Systems

Connect CRM and claims data



### Implement Authentication

Establish secure verification protocols



### Enable Escalation

Create seamless agent handoff