



Leveraging Data: Building Customer Service From the Ground Up





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Today's Agenda:



- Intro
- Current customer service operations
- Building out CS from scratch
- Quality Assurance at Blueberry Markets
- Leveraging data to make improvements
- Continuous scorecard creation + improvement
- Coaching + Calibrations
- Recognition

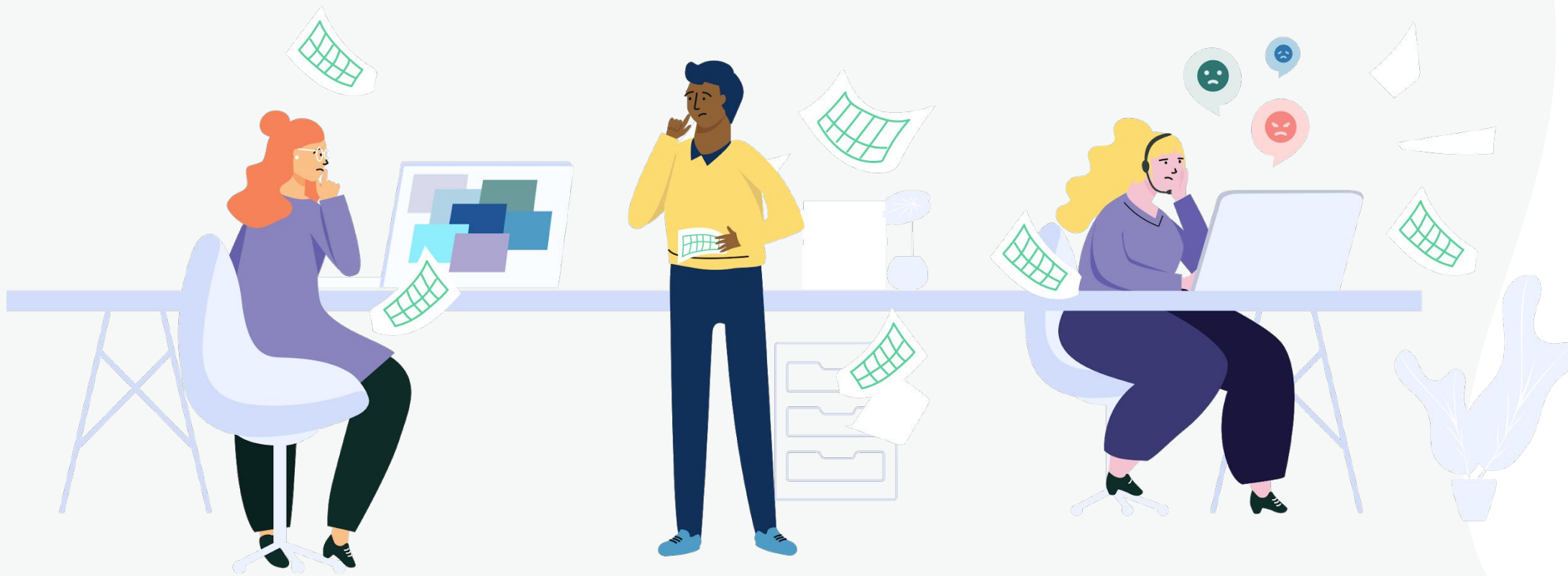


Blueberry Markets Customer Service Operations



- Email, phone, live chat, iMessage
- 24/7 Support
- Consistent monitoring of customer satisfaction
- Data-based initiatives
- Playvox products used: Community, Coaching, Quality
- Built CS entirely from scratch in the middle of the pandemic

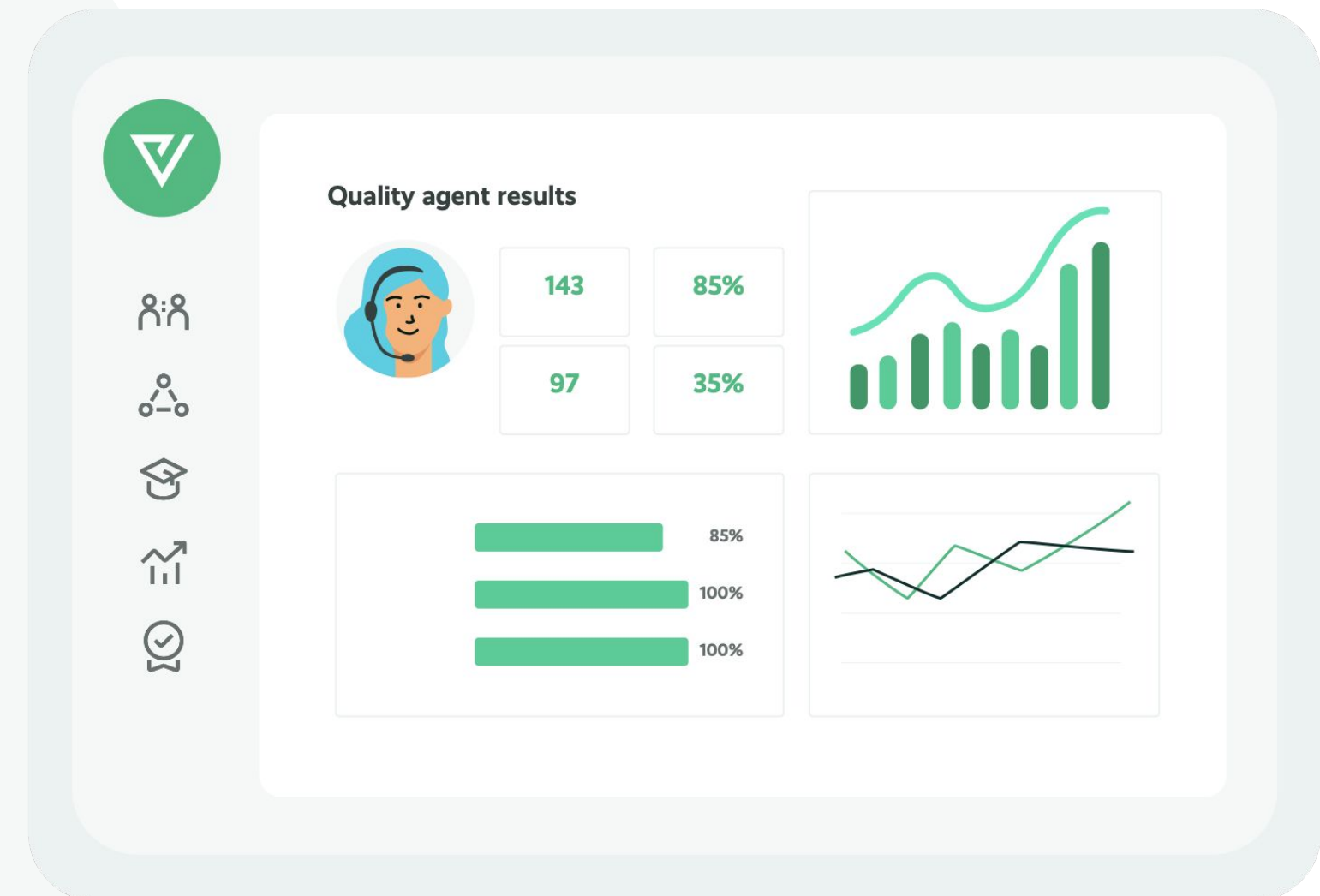
Building CS and QA from the Ground Up



- No QA to start. When CS was outsourced, scores were not good
- There was initially no plans to incorporate QA → this lead to Playvox
- Built during the pandemic.
- Quality evaluations on the entire team
- Doing QA to measure internal success (CSAT measures customer success)

Leveraging Data to Make Improvements

- Focus on improving the scorecards in order to capture both the good and the bad
- Agents already accustomed to QA, as majority came from BPOs
- Heavy emphasis on the trends by errors/trends by section as a way to see where improvements are needed



Continuous Scorecard Improvement + Creation



- Given the nature of the industry, scorecards need to be changed frequently
- They need to be agile + adaptable
- Formal rollout for every scorecard

Did the agent inform the customer of the estimated timeline to resolve their issue? If the agent needed time to research or was on multiple chats, did he/she politely inform the client?



Result: 0

- ☐ Yes
- ☐ No
- ☐ N/A

5

0

ADD COMMENT

Did the agent confirm that the issue was resolved or the transaction was complete?

Result: 0

- ☐ Yes
- ☐ No
- ☐ N/A

10

0

ADD COMMENT

Did the agent use perfect grammar and have friendly, casual conversation tone?

Result: 0

- ☐ Yes
- ☐ No

2.5

0

ADD COMMENT

CUSTOMER CRITICAL

WEIGHT 30%



Did the agent practice "active reading"?



Result: 0

- ☐ Yes
- ☐ No

10

0

Fail section

ADD COMMENT

How well did the agent engage with the visitor?



Result: 0

- ☐ Excellent
- ☐ Good
- ☐ Needs Improvement

5

3

0

Fail all

ADD COMMENT

Did the agent communicate clearly and fluently?



Result: 0

- ☐ Excellent
- ☐ Good
- ☐ Needs Improvement

5

3

0

ADD COMMENT



Sure I can check that out.

Gerry - : Apr 19 01:58, 2021
I'll be more than happy to help you with your concern for today.

FEEDBACK SUMMARY

Great job, Gerry.

✓ **SIGNED ON:** Apr 23 08:23, 2021.

Comments (2 COMMENTS)



Gerry --: Thank you for taking the time on evaluating my Chat. I'll continue to provide awesome customer service to our clients.

Apr 23 08:24

Yay! 🌟

Apr 23 23:57



GOAL 95% QA SCORE 100% [VIEW SUMMARY](#)

04/12/2021 107963516 I believe our Evaluator scores our interaction with the clients are all objective and fair.

04/11/2021 107917035 QA always provides feedback or coaching opportunity whenever you have errors or mistakes.

04/11/2021 107914654 Love it.

04/11/2021 107911044 The quality assurance team makes sure to point out the things that I have to improve on and never fails to remind me of what I need to improve on.

04/09/2021 107696921 Evaluations helps us improved.

Calibrations

- Not just limited to team leaders
- Agents get first-hand experience with calibrations
- Calibrations as a way of creating synchronicity

SUMMARY

Calibration#: 13

Scorecard: CS Chats - Q4Y2020 v2.1

Expert: Richard -- Evaluation completed

Agent: Richard --

Interaction id: QJXZC99H33

Status: Completed

Date created: Nov 25 03:12, 2020





Due date: Nov 30 23:59, 2020

Comments: Please do the calibration over the weekend. Thanks!

86.54%

AVG. CALIBRATION

PARTICIPANTS

USER	CALIBRATION	MATCHING ANSWERS	ACTION
 Richa Niedo	84.62%	11 / 13	DETAILS
 Margarette --	92.31%	12 / 13	DETAILS
 Doyle --	84.62%	11 / 13	DETAILS
 Fei --	84.62%	11 / 13	DETAILS

[SHOW ALL](#)

Section: Greeting & Introduction

[Section results by user](#)


75%

Section: Chat Bedu

90%


Coaching

- Created templates inside of Playvox
- Every week, every month, every quarter
- Identify wins and challenges from those periods and set goals/ action plans



Richa Niedo

501

Coached by:  John --

Achieved: Yes

Created at: Apr 08 22:55, 2021


Coaching type: General

End date: Apr 15 09:59, 2021

Coaching topic: Monthly Coaching

Teams: All users Team JP Customer Support

Coaching satisfaction: Excellent, satisfied

COACH ↕	COACHINGS ↕	EFFECTIVENESS ▾	SATISFACTION ↕	SIGNED ↕
 Richard --	10	100%	100%	90%
 Michael --	13	85%	100%	84%

Recognitions

- There were recognitions in the past but not as successful as with Playvox
- Weekly badges as a consistent reminder of good work
- Agents mention their appreciation for the Karma Store in their poll surveys every quarter



 **Robin Hartingdon** recognized **Abigail Esmaya** 9 days ago  


Happy Work Anniversary! What a fantastic effort to be in the business for a year and to be leading the team for over half that time. So proud of your efforts and looking forward to many more!




Abigail Esmaya received a Happy Workaversary! badge
Work Anniversary

4 5

♥ Unlike 💬 Comment ☆ Recognize

 **James** --
Happy Workaversary 🍷

9 days ago  1  like

 **Kersey Romero** 🎸

3 days ago  1  like

 **Michael** -- recognized **Keanu** --
14 days ago


For the month of March 2021!



Keanu -- received a 5 KPI Goals badge
Met all 5 KPI Goals for the Month

♥ 1 💬 1

Like Comment Recognize

 James

 **Hanna** -- recognized **John** --
About a month ago


All teams, all 5. Wow!!! Keep up the great work, team!!!




John -- received a **5 KPI Goals — Team** badge
Met all 5 KPI goals for the week

2 2

 Comment

 **James --**
great job Team JP 🍌 keep it up 🍌

About a month ago  1  like

 **Margarette --**
Amazing! Great job everyone! 🌟👏🏆

About a month ago  1  like



Logitech H340 USB He ...

68 Karma points

Redeem



JBL GO2+

120 Karma points

Redeem



Logitech MK220 Wirel ...

50 Karma points

Redeem



Logitech B170 Wirele ...

26 Karma points

Redeem



50 USD Cash

100 Karma points

Redeem

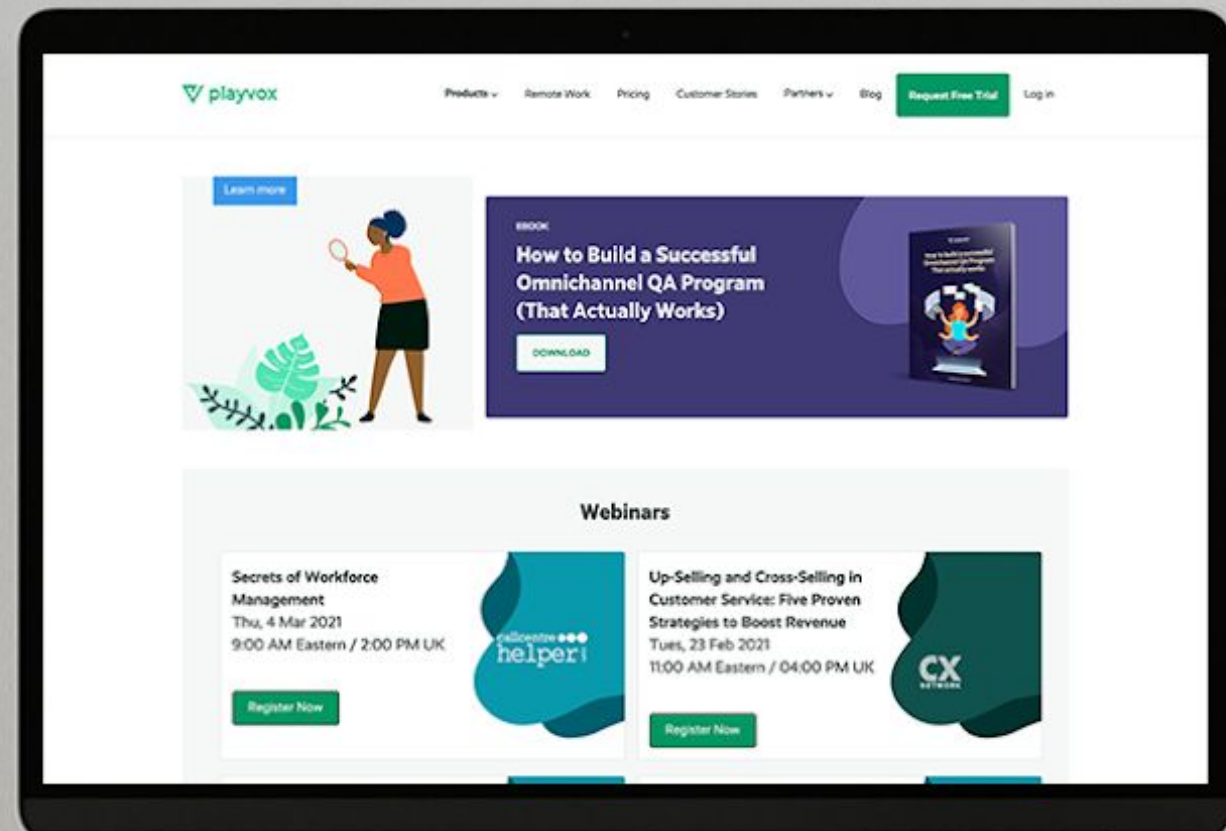


Leave Credit

100 Karma points

Redeem

playvox.com/resources



Agent Optimization Suite

Motivation

Recognize and reward your agents with points that they can exchange for gifts, based on their Quality, Coaching, Learning and overall Playvox results.

Workforce Management

Intelligently forecast, schedule, and monitor your workforce without the need of specialized resources or data analysts.

Coaching

Solve and improve issues in: quality, behavior, compliance, soft skills, customer experience, among many others.

Quality

Easily identify and prioritize areas for skill development in your customer service teams.



Learning

Easily create and provide your customer service teams with online courses and quizzes to ensure continual skill development.

Performance

Track agent performance and measure the impact of your QA process.

Voice of the Customer

Translate customer sentiment into actionable metrics while delivering real-time feedback to your agents and team leaders.