

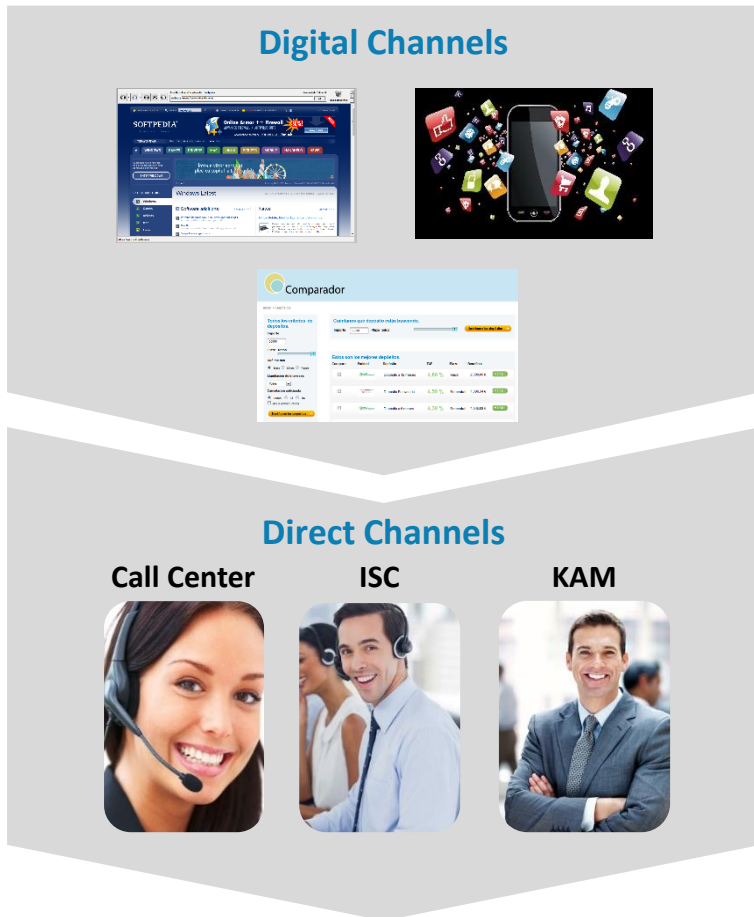
Agent-matching, direct channel conversion boost

Case Study

Version 02.05.2018



Combining digital + direct channels: a proven successful model...



Sales model

- Capture of leads with online media campaigns and agent closing
- Management of clients and prospects through proximity managers (in offices not at street level, working mainly with telephone and digital channels)

Weight on sales – illustrative case studies

- **+70%** of FBB total sales
- **+50%** of total subscription product sales
- Proximity managers –**strategic bet of leading financial institutions**

The combination of digital and direct channels is growing rapidly, and is already the main channel for attracting and commercializing customers in multiple industries and products ...

The opportunity - to optimize the matching between clients and agents using big data techniques ...



The information available, both from prospects & clients and from the agents, can be used to optimize the match and increase the conversion and productivity with big data models...

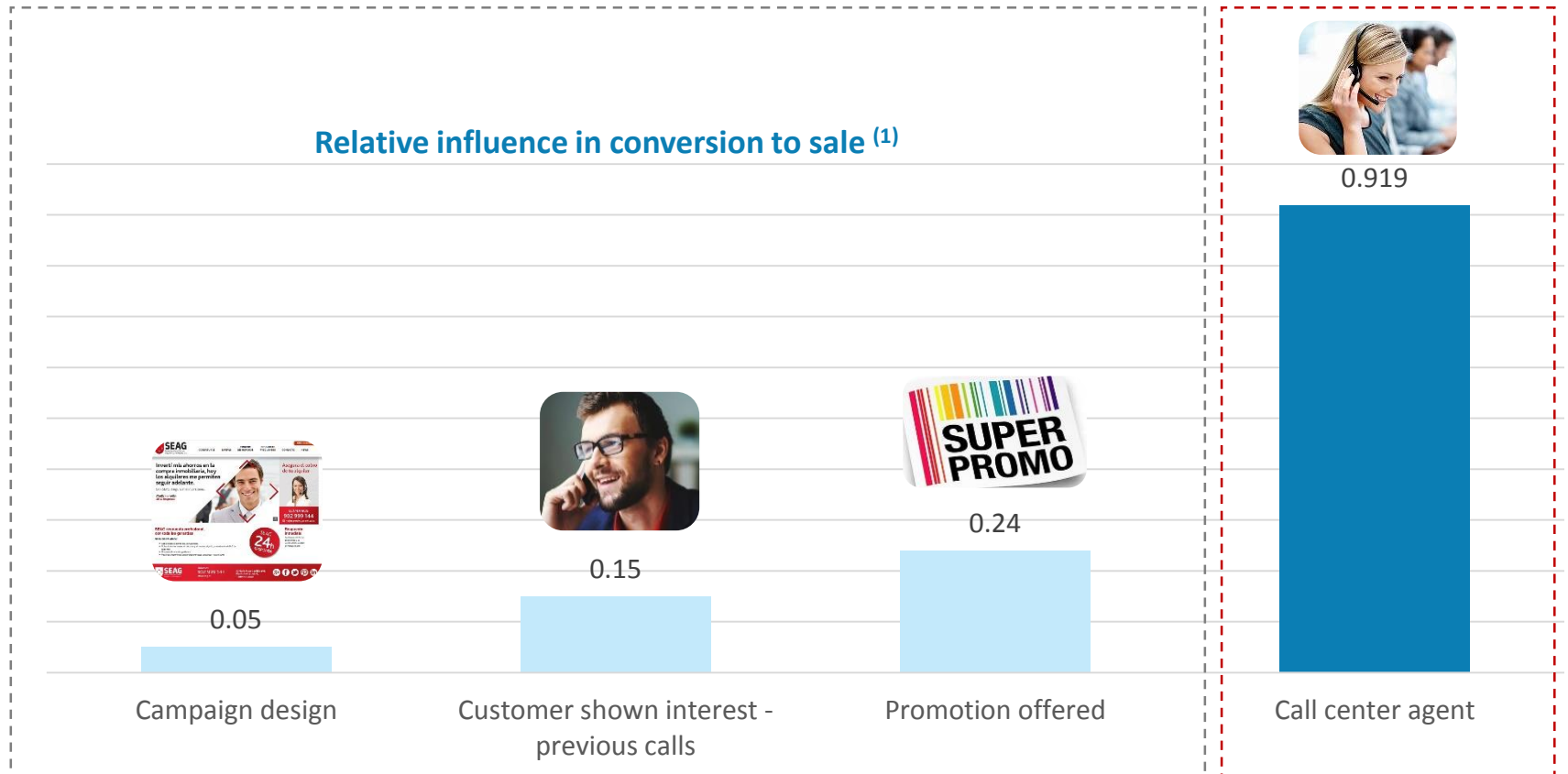
The agent – a key lever optimization often neglected ...

What factors intervene in the conversion to sale?



Variables related to:

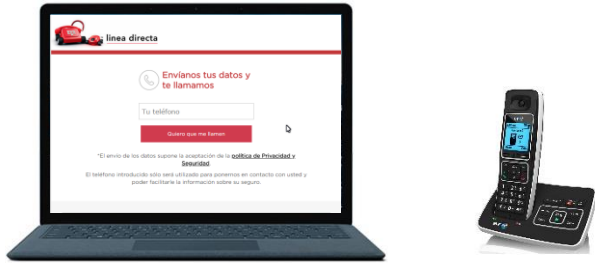
Regular focus of the optimization effort



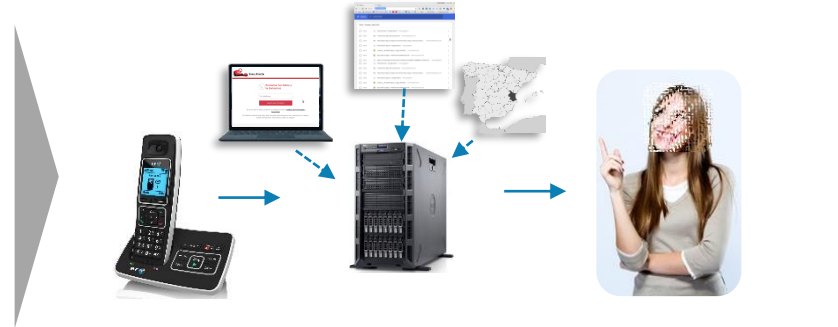
(1) Approximate figures of a customer in the telecommunications industry, direct sales channel for consumer segment- capturing leads and closure with call centre agent

The variables related to the agent have a crucial weight to explain the conversion to sale (i.e., key to manage them to maximize total productivity), but often are the "big forgotten" ...

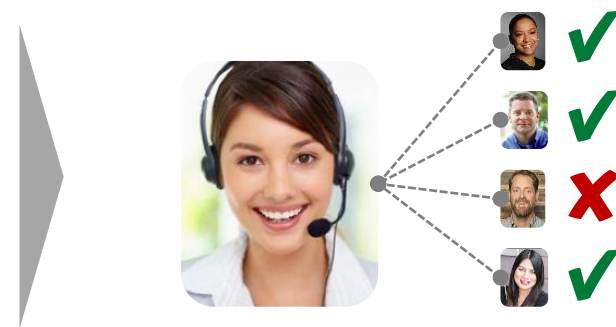
Agent-matching process



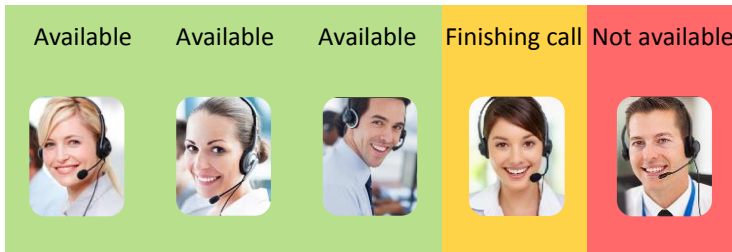
- As response to an online campaign, a click-to-call is generated (or the customer calls the specific phone number of the campaign)



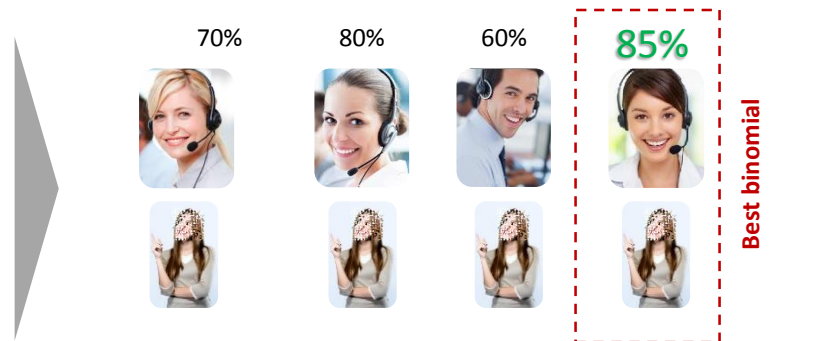
- In real time, an analysis and segmentation of the customer's profile is generated based on landing page, campaign phone number, origin of call, online behaviour, etc.)



- Previously, a profile of all the agents was generated based on their track record with different customer profiles



- Agents which are available, and those who are about to finish a call, are identified.



- Algorithm performs an analysis of all the possible combinations, between the customers which are waiting to be connected, and the available agents



- The customer call is connected with the optimum agent.
- The full process since the call was received, has not lasted more than a second.

The agent-matching solution will identify the best binomial Agent-Customer that will increase sales conversion chances

What improvements can be achieved? Estimated impact on a client - illustrative



⁽¹⁾ Margin of contribution of incremental sales - excluding incremental direct costs to it. It depends on the type of product, but it is important to note that most of the costs are not incremental to the new sale (e.g. media costs, general expenses, etc.)

⁽²⁾ The calculation of the Break-Even point includes the costs related to the implementation of the SaaS solution - figure based on other case studies

⁽³⁾ Estimated margin for year 5 in a case study - to be determined for each client during the previous validation phase with historical data

As standard, the range of improvement attributable to matching optimization is around 10% - 15%, with a very important direct economic impact, since the direct incremental costs are minimum...

More information

For more information on ways we can help your contact centre be more effective, please contact:

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***“Luck is what happens when preparation
meets opportunity”***

Seneca, c4 B.C. – A.D. 65

Let's build luck together

Insight, 2018