AUTOINSIGHTS: ENHANCING SALES COMPLIANCE AND OPERATIONAL EFFICIENCY WITH WORKFLOW AUTOMATION

In today's fast-paced sales environment, ensuring that agents follow a sales process, scripts and adhere to compliance regulations is more critical than ever. Sales organizations, especially those in regulated industries like insurance, need to guarantee that agents comply with product disclosures, payment processes, and qualification questions—each of which plays a key role in protecting both the business and the customer.

AutoInsights offers a solution that enables organizations to automate the monitoring of agent calls, ensuring compliance while simultaneously enhancing operational efficiency. Initially presented as a workflow tool, AutoInsights has evolved into a sophisticated platform capable of handling multiple sales workflows, automating the process of managing sales calls, and providing valuable post-call insights using Generative AI (GenAI).

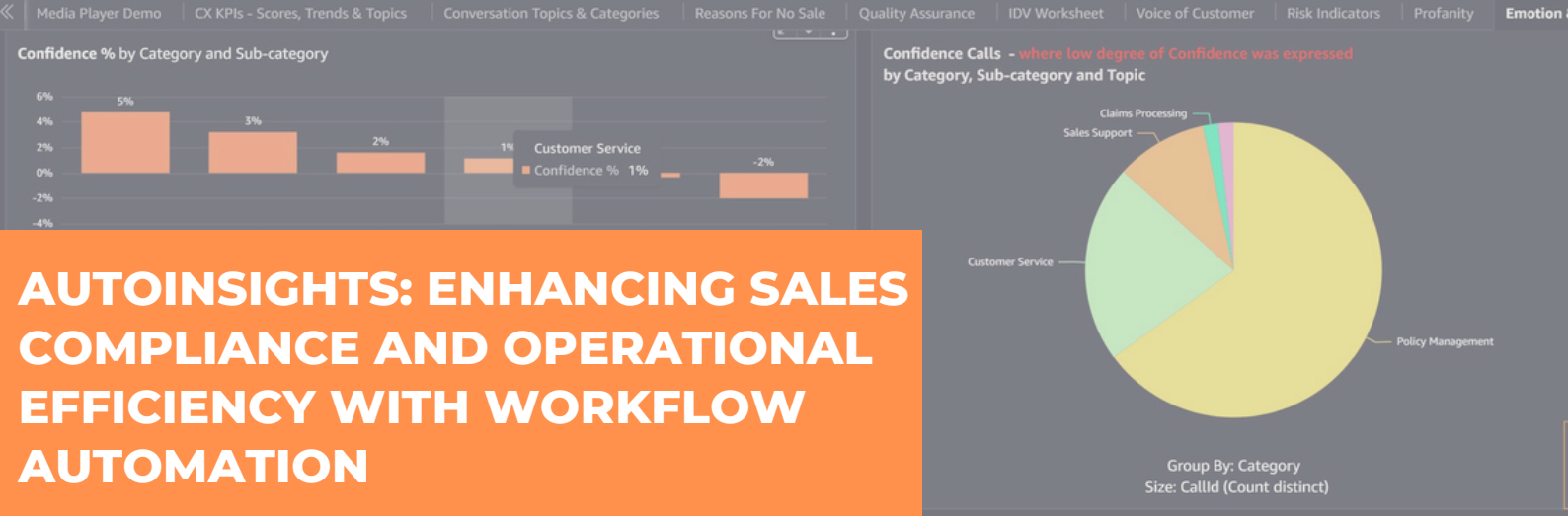## 1. Script Adherence: A Foundation for Sales Compliance

The journey with AutoInsights begins with script adherence, the initial solution designed for sales organizations with strict compliance requirements. AutoInsights helps ensure that agents follow prescribed scripts during sales calls, focusing on critical elements such as:

- Product disclosures: Ensuring that agents communicate the required product features, benefits, and terms.
- Payment process adherence: Verifying that agents outline the payment process as mandated by company policies.
- Qualification questions: For industries like insurance, agents must ask qualifying questions about a client's needs and circumstances before proceeding with the sale.

By monitoring and scoring each call, AutoInsights provides near real-time data on agent performance, flagging deviations from the required script. This enables businesses to identify potential compliance risks quickly, ensuring that agents are held accountable for their interactions with customers.

Use Case: Insurance and Financial Services

We used AutoInsights to ensure that agents adhered to product disclosure scripts for health insurance and financial products. The solution automatically flagged any missed disclosures, providing a comprehensive audit trail for compliance purposes. This solution significantly reduced the time spent manually reviewing calls and improved compliance across the board. By ensuring that agents follow required scripts, AutoInsights helps businesses reduce compliance risks and avoid penalties. But as businesses grew more sophisticated in their customer interactions, the need for more advanced features became apparent.

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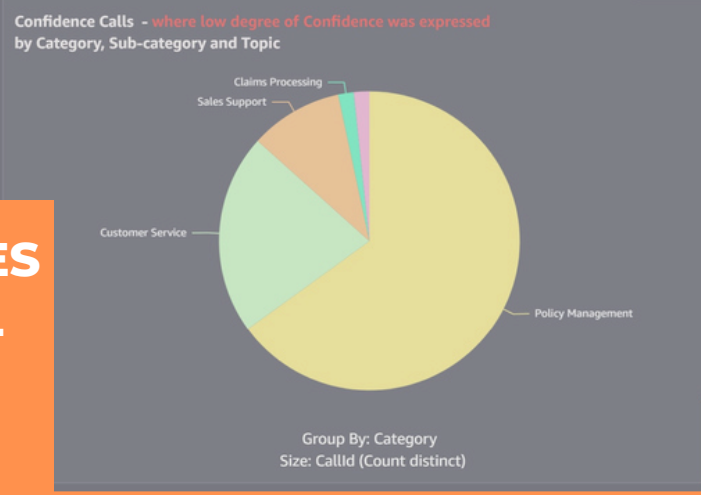
2. Evolving Beyond Script Adherence: Workflow Automation and Advanced Features

While script adherence is a foundational feature, AutoInsights has expanded its capabilities to provide a comprehensive suite of tools aimed at improving sales effectiveness and operational efficiency.
Key developments include:

- **Sales Effectiveness Listeners** - AutoInsights now includes Sales Effectiveness Listeners, which provide more detailed insights into agent performance beyond script adherence. These listeners evaluate the quality of sales calls, focusing on areas such as:

  - **Solution Selling**: Whether the agent effectively matches customer needs with the right products or services.
  - **Upselling and Cross-Selling**: Identifying opportunities where agents could have promoted additional products that benefit the customer and the business.
  - **Proactive vs. Reactive Sales**: Evaluating whether the agent took a proactive approach to solving customer problems or simply reacted to customer queries.

These listeners use GenAI to analyze the content of each call, scoring agents based on their performance in these key sales areas. This provides managers with actionable insights that go beyond compliance and focus on improving sales outcomes.

- **Advanced Business Rule Application** - In complex sales environments, agents must follow specific business rules based on customer needs and the products they are selling. AutoInsights uses GenAI to define, analyze, and score the application of these rules, ensuring that agents qualify customers correctly and make the right recommendations. Key benefits include:

  - **Automated Rule Application**: The system automatically applies product-specific business rules, such as asking qualifying questions for health-related products or financial assessments for insurance.
  - **Post-Call Analysis**: After each call, the system evaluates how well the agent adhered to business rules and identifies areas for improvement.

- **Customer Interaction Analysis** - AutoInsights also leverages GenAI to analyze customer responses, providing deeper insights into agent-customer interactions. This includes:

  - Customer Engagement Scoring: The system evaluates how effectively agents engage with customers, addressing their needs and ensuring the conversation is aligned with the sales objectives.
  - Response Accuracy: AutoInsights ensures that agents are accurately addressing customer queries, providing the right information, and ensuring customer satisfaction.

Confidence % by Category and Sub-category

Confidence Calls - where low degree of Confidence was expressed
by Category, Sub-category and Topic

Group By: Category
Size: CallId (Count distinct)

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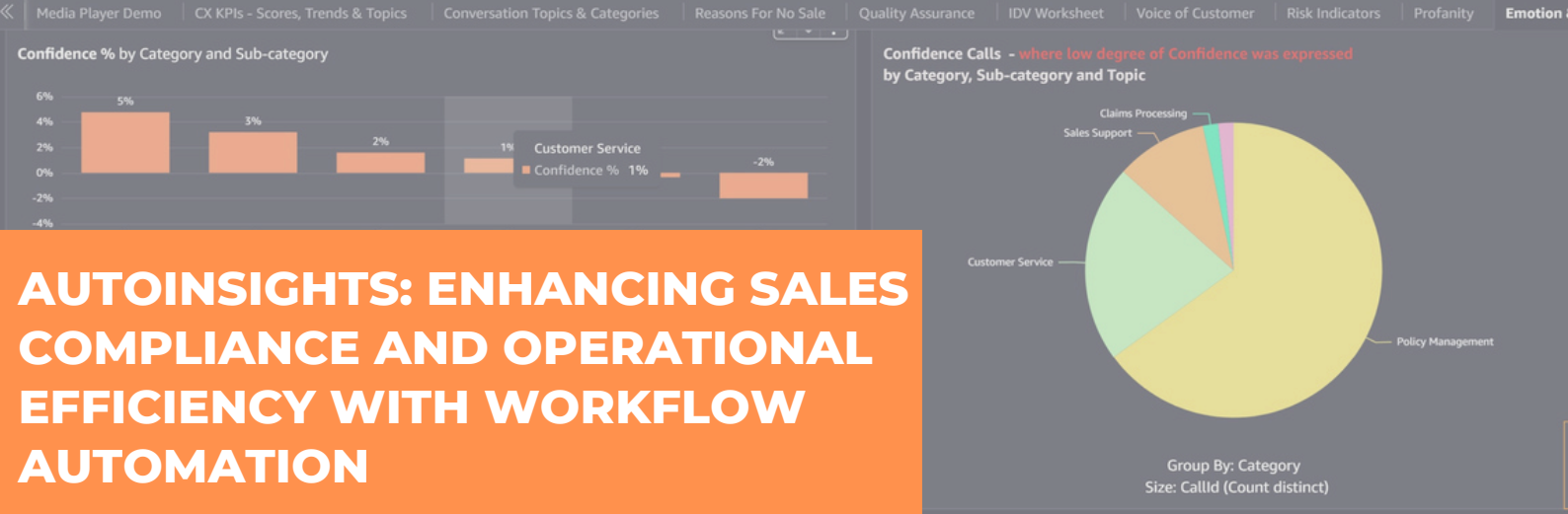## Use Case: Health Insurance Qualification Questions

For health insurance products, AutoInsights enabled businesses to define complex qualification criteria (such as medical history and financial status) and score agent performance based on how well they followed the required business rules. This feature has been a game-changer for businesses to ensure agents ask the right questions and offer products that are well-suited to customers' needs.

Use Case: Car Insurance Workflow Automation: Reducing Claims Costs

A major short-term insurance company used AutoInsights to automate their script adherence process to address a costly issue in their claims processing. The company faced significant financial losses—up to US$3.5 million per year—due to agent errors during client interactions. Specifically, agents were failing to ask key questions related to accident coverage and claims processing during sales calls, which directly impacted their ability to manage claims.

- **Challenge**: The insurer required that agents ask specific qualifying questions during the sales call to ensure customers were adequately covered. If these questions were not asked, and an accident occurred, the insurer was obligated to pay the claim even if the necessary steps had not been completed during the sales process.

- **Solution**: AutoInsights automated the monitoring of sales calls to ensure agents were following the required script and asking all mandatory questions. By evaluating agent adherence to the prescribed workflow in near real-time, AutoInsights flagged any missed questions during the call. Negative scores, indicating agent errors, were automatically sent to the client's CRM system every hour.

- **Escalation and Workflow Automation:** When AutoInsights detected a negative score, these flagged calls were immediately forwarded to a concierge team. The concierge team would then proactively contact the customer, ask the missing questions, and complete the sale. This ensured that the customer's coverage was fully aligned with the policy requirements, reducing the insurer's risk of paying claims due to agent error.

- **Results**:
  - US$2.5 million in annual savings due to a reduction in agent errors and claims payments.
  - Increased operational efficiency by automating the process of detecting and rectifying errors.
  - Improved compliance with regulatory requirements, ensuring that all customers had the proper qualifications for their policies.

This use case demonstrates how AutoInsights not only helps ensure compliance through script adherence but also acts as a powerful tool for workflow automation, driving both operational efficiency and cost savings for businesses.

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3. Post-Call Analytics for Continuous Improvement

The heart of AutoInsights is its powerful post-call analytics capabilities. By analyzing every call, AutoInsights provides businesses with valuable insights into agent performance, customer behavior, and sales effectiveness. Key features include:

- Comprehensive Scoring: AutoInsights generates detailed scores for each agent based on their performance across multiple dimensions, including script adherence, sales tactics, and customer engagement.
- Customizable Dashboards: Businesses can customize their dashboards to focus on the metrics that matter most, such as sales conversions, upselling success, or compliance rates.
- Training and Development: With detailed feedback on agent performance, businesses can use the insights to guide agent training and coaching, improving both compliance and sales outcomes over time.

4. Benefits for Sales-Oriented Organizations

The advancements in AutoInsights go beyond compliance and touch every aspect of sales performance. The key benefits for businesses include:

- Improved Compliance: By automating script adherence and ensuring that agents follow all regulatory requirements, businesses can reduce compliance risks and improve audit efficiency.
- Enhanced Sales Performance: With Sales Effectiveness Listeners, businesses can increase upselling and cross-selling opportunities, maximizing the potential of each call.
- Operational Efficiency: By automating post-call analysis, AutoInsights reduces the need for manual oversight, allowing businesses to focus on strategic activities while ensuring high standards of agent performance.
- Scalable Solution: AutoInsights is designed to scale with businesses as they grow, easily adapting to new products, business rules, and regulatory requirements.

Conclusion: A Comprehensive Solution for Sales Organizations

AutoInsights offers a comprehensive solution for sales organizations seeking to improve agent performance, ensure compliance, and automate workflow processes. Starting with script adherence, AutoInsights has evolved to support a variety of advanced use cases, including sales effectiveness, QA monitoring, and workflow automation. By leveraging the power of GenAI, AutoInsights provides businesses with actionable insights that drive improved outcomes, higher operational efficiency, and significant cost savings.

Whether your business is focused on improving compliance, enhancing sales effectiveness, or automating key workflows, AutoInsights is equipped to help you achieve your goals. Through the continuous monitoring and analysis of agent-customer interactions, AutoInsights ensures that your business remains competitive while adhering to compliance standards.

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