



AutoInsights **For Comparison & Aggregator Businesses**

*Driving Sales Conversion, Compliance,
and Productivity with Augmented AI Voice
Analytics*

The Challenge for Comparison Businesses



- **High-Volume, Multi-Product Sales:** Aggregator environments must handle vast call volumes across diverse product categories like insurance, loans, and utilities — each with unique scripts and standards.
- **Manual QA Limitations:** Traditional quality assurance methods can review only 1–2% of calls, leaving gaps in risk detection and agent development.
- **Compliance Pressure:** Businesses must meet stringent obligations for advice, disclosure, and product suitability — often under tight regulatory scrutiny (e.g. ASIC, AFCA).
- **Inconsistent Conversion Rates:** Conversion success varies dramatically across agents, products, and campaigns due to lack of insight into performance drivers.
- **Fragmented Operational Visibility:** Siloed systems across brands and providers limit a unified view of sales performance, compliance, and customer experience.

Comparison and aggregator businesses operate in one of the most complex and fast-paced sales environments. With high volumes of inbound and outbound calls spanning numerous product lines, agents must navigate diverse sales protocols and compliance requirements — often in real time.

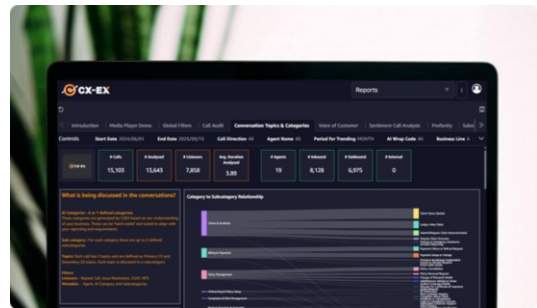
Unfortunately, traditional QA approaches simply can't keep up. Only a fraction of calls are audited, which creates substantial blind spots in performance management and risk mitigation. Compliance isn't optional — regulators like ASIC demand consistent adherence to advice and disclosure standards, yet without full visibility, issues go undetected.

Conversion outcomes are equally unpredictable. Without knowing what's happening on each call, it's hard to understand what drives success — or failure. These challenges are amplified by fragmented systems that prevent a holistic view across brands and campaigns. AutoInsights addresses these very issues — at scale.

Introducing AutoInsights



- **Comprehensive AI Voice Analytics:** AutoInsights analyses every sales, compliance, and CX call — offering total visibility across your operations.
- **Seamless System Integration:** Works with your current telephony and CRM systems, requiring no disruption to existing infrastructure.
- **Augmented AI Contextualisation:** Fuses call transcripts with product-specific metadata (e.g. type, provider, cover level, sale outcome) to add context to QA.
- **Customised Dashboards:** Real-time dashboards for agent QA, sales conversion, compliance tracking, and customer experience trends.
- **Risk-Free Pilot:** Deploys using your existing call recordings, allowing a low-cost, low-risk trial before full implementation.



AutoInsights for Healthcare

Meet AutoInsights — the AI-driven voice analytics platform purpose-built for the needs of comparison and aggregator businesses. This platform doesn't just record calls; it extracts value from them. Every call is transcribed, tagged, and analyzed in the context of your products and customer journeys.

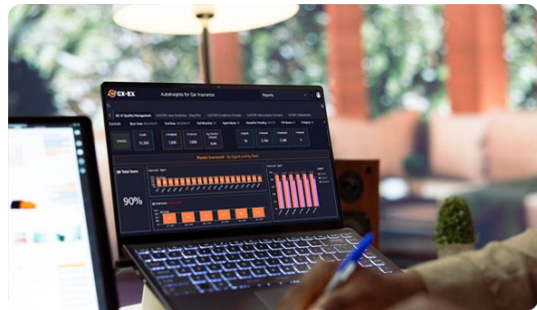
The system integrates seamlessly with your existing tech stack — no major IT projects needed. By blending transcript data with call-level metadata like product type and sale outcomes, AutoInsights delivers rich context to its analytics, empowering both compliance and sales functions.

From QA dashboards to conversion insights and CX tracking, AutoInsights puts actionable intelligence at your fingertips. And best of all, it's easy to start — with a low-risk pilot that uses your existing recordings to demonstrate measurable impact.

Use Case 1: Quality Assurance at Scale



- **Pain Point:** Incomplete Audits: Manual QA processes review only a small fraction of calls (~1–2%), leaving most interactions unaudited and risky.
- **100% Call Analysis:** AutoInsights audits every call automatically, providing complete visibility across CX, Business, and Compliance domains.
- **Personalised Agent Reports:** Detailed performance dashboards with targeted coaching recommendations based on individual call analysis.
- **Massive Efficiency Gains:** Up to 90% reduction in QA effort with consistent and scalable auditing processes.



AI Quality Management on AutoInsights

Let's begin with one of the most transformative use cases — Quality Assurance at scale. Traditional QA teams are overwhelmed by volume. They can barely touch 1–2% of calls, meaning potential risk, non-compliance, and missed coaching opportunities often slip through the cracks.

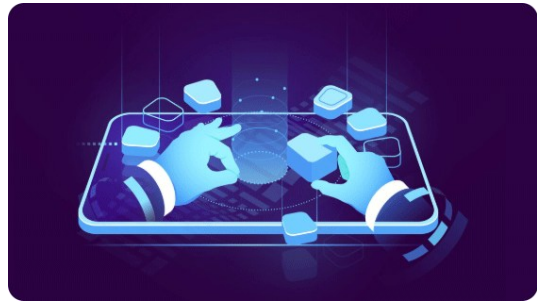
With AutoInsights, 100% of calls are audited. Every interaction is reviewed not just for compliance, but also for CX and business impact. This all-encompassing approach ensures no call goes unchecked.

The result? Huge productivity gains — often reducing manual QA effort by 90%. Moreover, agents receive actionable feedback tailored to their specific calls, enabling better performance, faster coaching cycles, and consistent standards across your team.

Use Case 2: Augmented AI for Product-Specific AutoQA



- **Pain Point - Disconnected Insights:** Legacy speech analytics systems cannot align QA with product-specific outcomes, limiting actionable insights.
- **Context-Aware Auditing:** AutoInsights matches each call to its product metadata (type, provider, cover level, outcome) for relevant auditing.
- **Standards-Based Evaluation:** Evaluates whether agents adhered to advice, disclosure, and comparison standards tailored to the product discussed.
- **Product-Specific QA Precision:** Pinpoints sales, advice, and compliance issues down to product-level accuracy.
- **Collaborative Rule Automation:** Automation requires agreed-upon QA scorecards, rules, and metadata standardisation.



Augmented AI for Product-Specific AutoQA

This use case highlights the power of context-aware auditing. Traditional QA tools often miss the nuance of what product was being discussed on a call — making it impossible to judge whether the agent did the right thing based on the product.

AutoInsights changes that by integrating metadata such as product type, provider, and outcome directly into the audit process. The system doesn't just ask, 'Was the call compliant?' — it asks, 'Was it compliant *for that specific product and customer scenario*?'

This leads to highly targeted and actionable QA findings, giving your team the ability to address issues by campaign, by product, or even by provider. It does require collaboration to set up rules and scorecards — but once in place, it delivers unmatched QA precision.

Use Case 3: Compliance & Risk Analytics



- **Pain Point - Regulatory Burden:** Comparison businesses face scrutiny from regulators like ASIC and AFCA, demanding strict oversight of advice, disclosures, and conduct.
- **Automated Compliance Checks:** AutoInsights performs automated audits for disclosure accuracy, suitability of comparisons, and misleading statements.
- **Full Audit Trail:** Maintains a call-level audit trail for all compliance metrics across agents and campaigns.
- **Proactive Risk Management:** Early detection of high-risk behaviors and systematic issues enables faster mitigation and governance.



Tracking Compliance word by word in AutoInsights

Compliance in the aggregator world is non-negotiable. With oversight from regulatory bodies like ASIC and AFCA, businesses must prove they're not just compliant — but ***consistently*** compliant across thousands of calls.

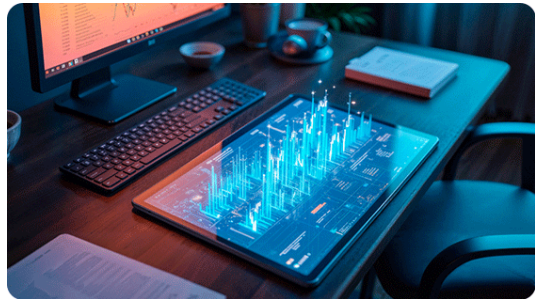
AutoInsights addresses this need head-on. It automates compliance checks that previously required manual review, identifying issues like improper disclosures, misleading claims, or unfair comparisons. This ensures that risk isn't just monitored — it's actively managed.

Even better, the system maintains a detailed audit trail for each call and campaign, supporting governance frameworks and providing defensible evidence in the face of inquiries or audits. This transforms compliance from a reactive function into a strategic advantage.

Use Case 4: Sales Conversion & Campaign Optimisation



- **Pain Point - Outcome Without Insight:** Conversion data is available but lacks the contextual 'why' — making optimisation difficult.
- **AI-Driven Sales Behaviour Analysis:** Identifies what top-performing agents do differently, from tone and pacing to objection handling.
- **Journey Friction Detection:** Surfaces where customers drop off or face friction in the call experience.
- **CRM + Voice Insight Integration:** Links CRM outcomes with voice data to enable performance tracking by agent, script, or campaign.
- **Impact - Higher Conversions:** Empowers managers to replicate effective sales strategies across the team.



Sales Conversions in AutoInsights

Conversion rates are the most closely watched KPI in any aggregator business — yet knowing how to improve them is often elusive. CRM systems may tell you **what** happened, but not **why**.

AutoInsights links AI-driven voice analytics to your CRM, bridging that gap. It uncovers what differentiates top-performing agents — their tone, structure, objection handling, even the words they use. That insight becomes a playbook for success.

It also reveals where potential customers are getting stuck — giving you a roadmap to remove friction from your sales journey. The outcome? Higher conversions, more consistent performance, and data-backed decision-making for campaign optimisation.

Use Case 5: Customer Experience & Retention



- **Pain Point - Undetected CX Failures:** Poor comparisons and negative call experiences damage brand trust, reduce retention, and drive complaints.
- **AI Sentiment Analysis:** Tracks emotional tone and satisfaction signals in every customer interaction.
- **Root Cause Insights:** Identifies triggers of cancellations, complaints, or dissatisfaction across campaigns and products.
- **CX Dashboards by Segment:** Real-time reporting by provider, product type, and agent to pinpoint CX weak spots.
- **Impact - Brand Loyalty:** Better experience drives repeat sales and lowers complaint volumes.



NPS and CSAT are two of the most reliable indicators of customer loyalty

Customer experience is the foundation of long-term success for aggregator brands. Yet poor comparisons, rushed calls, or unclear disclosures can quickly erode trust — and drive customers away.

AutoInsights captures the emotional temperature of every interaction. Its AI sentiment tracking identifies not just words but tone, helping you understand how customers *feel* throughout their journey. Combined with CX dashboards, it surfaces root causes of dissatisfaction, enabling proactive management.

The result? More satisfied customers, fewer complaints, and stronger repeat sales. With this level of insight, CX becomes more than a soft metric — it becomes a competitive advantage.

Use Case 6: Partner & Provider Insights



- **Pain Point - Limited Provider Visibility:** Aggregators depend on multiple product providers but often lack detailed visibility into provider-specific outcomes.
- **Conversion & Complaint Benchmarking:** Compares performance across providers on key metrics like conversions, complaints, and satisfaction.
- **Identify Problematic Products:** Pinpoints specific products causing call-backs, dissatisfaction, or complaints.
- **Evidence-Based Feedback:** Equips aggregators with data to share actionable insights and negotiate better outcomes with partners.
- **Impact - Stronger Partnerships:** Creates transparency and trust with providers, improving joint commercial outcomes.



Partner & Provider Insights

In aggregator models, success often hinges on the quality and performance of external product providers. But too often, visibility into provider outcomes is weak — limiting accountability and improvement.

AutoInsights enables detailed benchmarking across providers, revealing who's driving conversions and who's causing dissatisfaction. It can uncover which products lead to multiple call-backs, cancellations, or even complaints — insights you can bring directly to your provider relationships.

These data-driven conversations strengthen partnerships and improve customer outcomes. Over time, this also improves the aggregator's brand value and operational efficiency.

Benefits Summary for Utilities



- **Productivity Gains:** AutoQA automates compliance and QA processes, reducing manual QA hours by up to 90%.
- **Metadata-Driven Precision:** Combines voice data with call-level metadata for precise auditing by product, campaign, or agent.
- **Regulatory Confidence:** Ensures consistent compliance with disclosure and advice obligations — backed by a complete audit trail.
- **Sales Enablement:** Uncovers best-practice agent behaviours and friction points to increase conversion rates.
- **CX and Retention Gains:** Monitors sentiment and satisfaction to reduce complaints and improve repeat customer rates.

To summarise, AutoInsights delivers tangible value across the comparison business lifecycle — from sales and compliance to CX and commercial partnerships.

First and foremost, it massively improves operational productivity. By automating QA, you free up team time and enable consistent performance management at scale. Second, its metadata-driven approach provides a level of auditing precision previously unattainable — aligned to product types and customer contexts.

But beyond operations, AutoInsights fuels better outcomes: stronger compliance posture, increased conversion rates, and a measurable uplift in customer satisfaction and retention. It's a full-stack solution for driving excellence across your aggregator or comparison business.

Case Example (Anonymised Aggregator Business)



Multi-Line Call Analytics

Used AutoInsights to analyse every sales call across health and insurance product lines.



Augmented QA Automation

Automated compliance and product-specific QA scoring for each call using contextual metadata.



Conversion Uplift

Identified top agent behaviours and implemented training to improve sales effectiveness.



Results Achieved

Reduced QA time by 85%, improved compliance posture, and lifted sales conversions measurably.

Here's a real-world example of what AutoInsights can deliver. A leading Australian comparison brand — working across both health and insurance products — implemented AutoInsights to transform their QA and sales functions.

They analysed every recorded call using augmented AI. The platform evaluated each interaction for compliance, suitability, and product relevance, with context derived from metadata like product type and outcome.

The results were powerful: an 85% reduction in QA time, significantly improved governance, and a measurable increase in conversion performance through the identification and rollout of best-practice agent behaviours.

Next Steps



- **Run a Pilot:** Start by analysing existing sales call recordings and product metadata to validate impact.
- **Review Dashboards:** Assess QA, CX, and conversion insights from real interactions across your business.
- **Scale Deployment:** Expand to cover more brands, campaigns, and product lines using refined business rules.
- **Call to Action:** Schedule a 30-minute demo to see how AutoInsights can transform your QA, compliance, and sales strategy.

AutoInsights is ready to be deployed in your comparison business — and getting started is simple. First, we recommend running a pilot using your existing sales recordings and product metadata. This allows us to demonstrate real insights and measurable gains from day one.

From there, you'll have access to dashboards tracking QA, conversion, compliance, and CX across every campaign and brand. Based on your needs, we'll work with you to define the right business rules and scale up incrementally.

Now's the time to act. Schedule a short 30-minute demo and discover how AutoInsights can revolutionize how you manage compliance, optimise sales, and elevate customer experience — all at once.

Appendix Slide

CXEX has worked on building various reports for the clients to ensure they're aware of each aspect of their business

- **Agent Performance Report** – Provides weekly and monthly insights into agent behavior, presenting performance trends, strengths, and improvement areas in a clear, actionable format.
- **Customer Experience Report** – Analyzes the customer journey across calls, highlighting satisfaction levels, friction points, and recurring themes over the month to drive service improvements.
- **Digitalisation Report** – A unique blueprint that identifies automation opportunities across the business, reducing reliance on live agents, unlocking efficiency, saving costs, and improving customer response times.

These three reports work together to provide a complete picture — from agent performance and customer sentiment to digitalisation opportunities. Together, they help leadership improve quality, efficiency, and long-term automation strategy.

Agent Performance Report



- Delivers clear weekly/monthly insights into individual agent performance, highlighting both achievements and improvement areas.
- Tracks key metrics such as talk time, QA compliance, customer experience scores, and variance against team averages.
- Provides managers with actionable data to guide coaching, boost efficiency, and ensure consistent quality across the team.

Customer Experience Report



- Tracks key CX metrics such as CSAT, issue resolution, and repeat call rates to measure customer satisfaction and service quality.
- Provides weekly trend analysis, highlighting positive and negative shifts in customer experience over time.
- Equips leaders with insights to address pain points, improve first-call resolution, and strengthen overall customer loyalty.

Digitalisation Report



- Identifies call categories with high automation potential, quantifying deflection rates, hours saved, and cost benefits.
- Provides a phased rollout strategy (short, medium, long-term) to help businesses prioritise automation investments.
- Unlocks operational efficiency by reducing live-agent dependency, enabling faster service and measurable cost savings.