



Top 10 U.S. Financial Institution Achieves Higher Conversion Rate, Lower Cost, Better Call Quality & Compliance with Zenarate AI Coach

“ With our AI Coach agents are more prepared, productive, and confident. ”

-Sr. Manager, Global Training

Headquartered in the U.S., the Top 10 Financial Institution has a global presence with on and off-shore call center locations around the world where agents handle a variety of highly-regulated and challenging call types.

Headquartered: United States
Industry: Financial Services
No. of Employees: +10,000

The Challenge

The FI was spending significant time and money hiring and training agents only to have many leave in the first 6 months. For agents who stayed, it took 6 to 9 months to become proficient. Once on the floor, it was difficult to deliver the ongoing training necessary to address constant change and create top performing agents.

The company's Global Operations Leader was tasked with preparing thousands of call center agents for success in this complex environment.

Key Results

The top FI now coaches employees to perform their best by leveraging AI Coach from Zenarate.

- ➔ Increased Conversion Rates 42%
- ➔ Reduced Cost 31%
- ➔ Improved Call Quality and Compliance Scores 25%

The Solution

With Zenarate AI Coach, the FI uses advanced conversation simulation to create winning customer facing teams right out of training and close skill gaps for their underperforming tenured agents. Customer facing teams master real scenarios they encounter with customers and trainers can easily track their teams' performance and mastery of best and required practices.

Similar Companies Experience Proven Outcomes

- ➔ **56%** Avg. New Hire Speed to Proficiency Acceleration
- ➔ **22%** Avg. Conversion Rate Lift
- ➔ **33%** Avg. QA & Compliance Score Improvement
- ➔ **32%** Avg. Employee Attrition Reduction

Zenarate allowed agents in learning, whether new hires or tenured agents closing skill gaps, are immersed in real-life call simulation to master high impact topics they will face with live customers. Each agent has their personal AI Coach who simulates live customers on any topic and provides in-the-moment feedback if the agent doesn't use best practices or meet compliance requirements.

"The voice of agent trainer feedback was overwhelmingly positive and we were amazed how well our AI Coach understood agents using their own natural language never using scripts. Everyone instantly knew we were onto something big."

Global Operations Leader

The Decades Old Call Center Problem

The global operations team faced the same problem financial institutions have faced for years - how to prepare entry level agents to succeed in complex jobs with limited training & coaching time. And the problem is only getting harder with automation handling the simple customer inquiries leaving agents with the toughest problems to solve. **"I've managed Global Operations with 3,500+ agents for several years and the agent job is only getting tougher,"** says the Global Operations Leader.

New hires have just a few weeks to learn complex job requirements before hitting the floor. Once on the floor, busy front-line managers coach a small percentage of agent calls. And trainers find it difficult to take agents off the floor making it near impossible to deliver the ongoing development necessary to address constant change and create top performing agents.

Active Learning Solution

Over the years the Global Operations Leader looked for better ways to help agents get better. **“We always knew the power of active learning to prepare agents for success. We had an agent role play program however we found person-to-person role play inefficient and challenging to measure skill mastery and assess floor readiness.”**

The FI's Global Operations Leader heard about Zenarate and requested a demo. **“Zenarate's AI Coach demo knocked our socks off. We didn't know AI powered immersive learning existed.”** Agents in learning, whether new hires or tenured agents closing skill gaps, are immersed in real-life call simulation to master high impact topics they will face with live customers. Each agent has their personal AI Coach who simulates live customers on any topic and provides in-the-moment feedback if the agent doesn't use best practices or meet compliance requirements. After conquering each topic, agents graduate to the Master Story where their AI Coach presents them with random challenging real-life customer scenarios forcing them to think on their feet. Their AI Coach scores each simulation producing a Simulation Scorecard certifying agents for the floor.

Engage

Teammates engage with their personal AI Coach on high impact voice & chat scenarios they will face with live customers.

Master

Teammates master your Best & Required Practices with their personal AI Coach providing real time feedback.

Perform

Your AI Coach provides a Simulation Scorecard certifying teammates who have mastered your best methods and are ready to hit the floor as top performers.

From Onboarding to Deployment in 1 Month

The demo was impressive, but the biggest concern was time and effort to build their AI Coach. **“Zenarate pitched us on their Speed-to-Value model making it quick and easy to build our AI Coach with Zenarate doing most of the work. We were cautiously optimistic.”** The information security team rated Zenarate low risk for never using personal or account information and there was no IT integration for pilot or production.

Global Operations provided high impact topics to their Zenarate PM Holly. While Holly's Customer Success team was building their AI Coach with high impact topics and best practices, she hosted a 30 minute train-the-trainer session with pilot leaders. **“The platform is very intuitive and easy to use, our pilot leaders got it right away.”** Two weeks later their AI Coach was built and ready to test. Global Operations' SMEs and Holly spent the next three weeks testing and refining their initial immersion stories and creating new stories. **“Holly and her Customer Success team delivered story adjustments the same or next day. Zenarate's Speed-to-Value model worked just as advertised and we went from onboarding to pilot launch in 6 weeks.”** effective across their new hire customer facing teams and underperforming tenured agents.

“Everyone instantly knew we were onto something big.”

Global Operations Leader

Agent Feedback and Results

The FI launched their pilot with 33 agents and AI Coach was an immediate hit. **“The voice of agent and trainer feedback was overwhelmingly positive and we were amazed how well our AI Coach understood agents using their own natural language never using scripts. Everyone instantly knew we were onto something big.”** Tlobal Operations expanded thier AI Coach test across hundreds of agents to get statistically valid data. **“Our AI Coach increased our Conversion Rate 42%, lowered our Cost 31% and improved our Call Quality & Compliance scores 25%. The results were exceptional and we expanded from pilot to worldwide production.”**

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