

Balto 

# Understanding Mistakes During Calls

Contact Center Agent Survey Report

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# Purpose

Contact center agents serve a critical role in business. While answering questions, processing claims and resolving issues, contact center agents are often the front lines of generating revenue and providing a quality customer experience. In a **survey** conducted by Microsoft, 44% of people surveyed in the U.S. still prefer phone or voice as their primary customer service channel.

Although training tools are essential to support the **3.5 million contact center agents** across the U.S, there are very limited studies into optimizing agent training.

With an estimated **39,000 contact centers** across the country serving as the front-line of businesses, more research into common reasons for mistakes and which training tools are most effective will advance contact center performance and customer satisfaction.



# Methodology

The research was conducted by the third-party research firm Centiment on behalf of Balto in September 2020. The goal of the research was to understand:

- How often contact center agents make mistakes on their calls
- Common reasons for these potentially costly mistakes
- How to improve training and support contact center agents

Survey takers completed 9 multiple choice questions and 1 matrix question that asked them to self-report the primary reason they believe they make mistakes on their calls, followed by what training tools they consider the most helpful. The survey included an attention check question at the mid-way point to ensure respondents fully understood what they were being asked.

The sample spanned a range of agent experience levels from less than a year to 10+ years of experience, over a dozen industries, all company sizes and all use cases (from sales to debt collections).

*Centiment surveyed 1,032 English-speaking agents across the U.S.*

Definition of a contact center agent: someone whose primary job is to send or receive phone calls.

# Key Findings

Detailed findings and key takeaways are broken down by experience level of the agents, use case, and industry in this report. The most revealing insights include:

1000+

Agents at larger companies forget the right response 8% more than smaller companies

65%

of agents report that the primary reason they make mistakes on a call is due to human error, while only 35% of agents attribute their mistakes to gaps in company training.

Agents were 2x more likely to attribute their mistakes due to forgetting (24%) than from lack of training (12%).

83%

Agents find the most helpful training tool is company training.



# Why Do Agents Make Mistakes?

## Overview

We asked the agents to pick the most common reason why they make mistakes on a call out of the 5 possible choices - I forgot the right thing to say, I got nervous in the what of the conversation, I got bored saying the same things every time, I wasn't trained on how to handle the situation, and the training received wasn't effective.

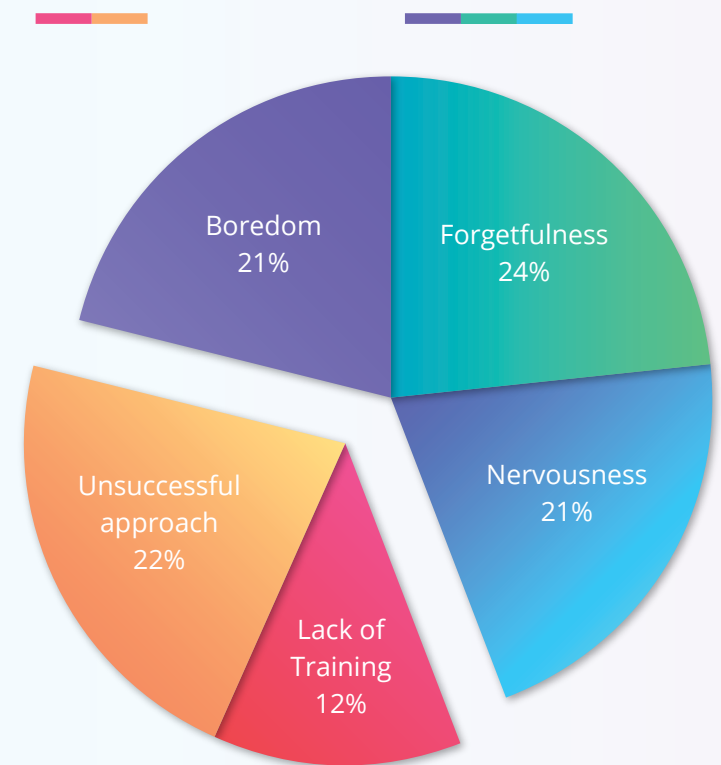
Our findings discovered that **65% of agents report that the primary reason they make mistakes on a call is due to human error, including forgetfulness, nerves, and boredom.** Meanwhile, **only 35% of agents attribute their mistakes to gaps in company training, including lack of training on specific situations and the training received wasn't effective.**

The most common reason for making a mistake was due to forgetting (24%) while the least common reason was from lack of training (12%).

## Why Agents Make Mistakes

Gaps in Company Training (35%)

Human Error During Calls (65%)

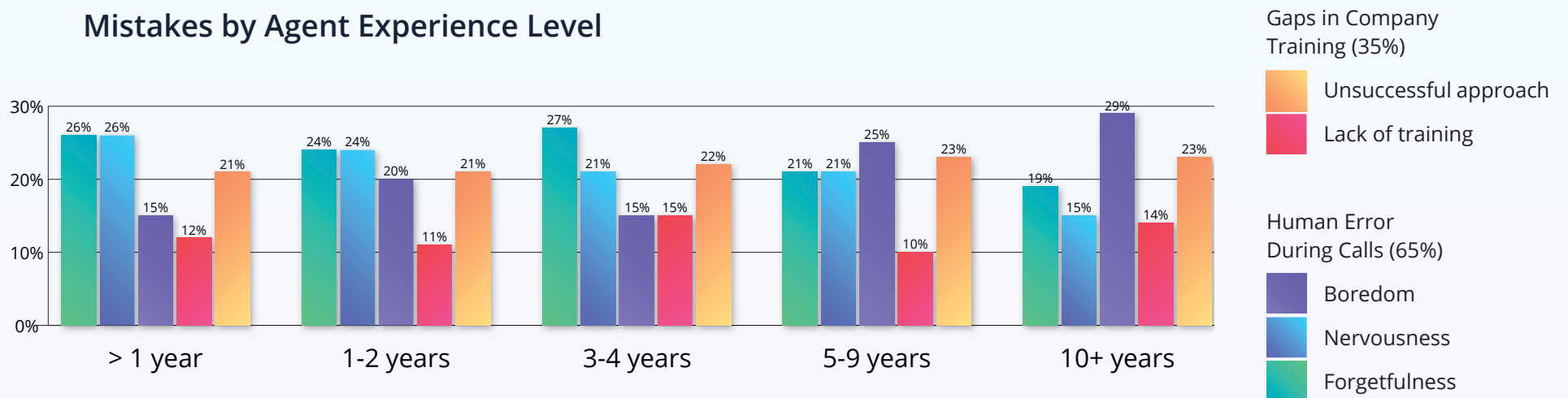


## Agent Experience Level

There is a significant change between agents with 0–4 years of experience and agents with 5+ years of experience.

- Agents with 0–4 years of experience ranked forgetting as the largest factor in making mistakes, which indicates that less experienced agents have a hard time remembering their training, even if it is the most helpful tool for them.
- Agents with more experience ranked boredom as their leading cause of mistakes, suggesting that the lack of innovation and excitement causes lower success rates among experienced agents.
- Although it was no group's largest reason, more than 20% of agents at all experience levels indicated that the primary reason they made mistakes was because the training received wasn't effective. This may be due to contact centers not being able to track and test which strategies and phrases work the best.

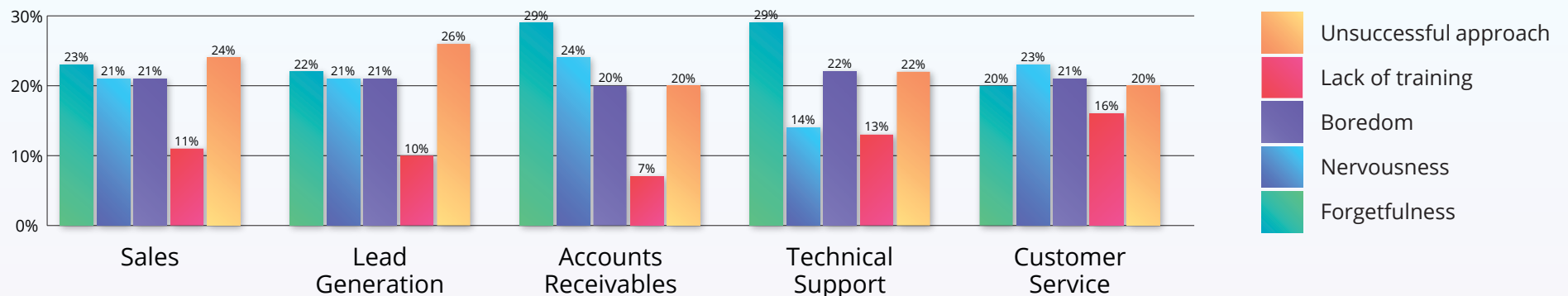
## Mistakes by Agent Experience Level



## Use Cases

- Accounts receivable and technical support agents attribute their mistakes largely to forgetting the right thing to say. This is understandable as their job function is based heavily on compliance and manuals, which require memorizing a lot of information.
- Sales and lead generation agents reported that the most common reason was that the training received wasn't effective and forgetting as a close second. This indicates that having the right playbook and testing what replies work the best are critical for transactional calls.
- Customer service agents ranked nervousness in the heat of the conversation as the main reason for making mistakes, likely due to interactions with unsatisfied and emotional customers.
- Although the most common reason why agents make mistakes varied by use case, the **least common reason** in all cases was lack of training.

## Mistakes by Use Case





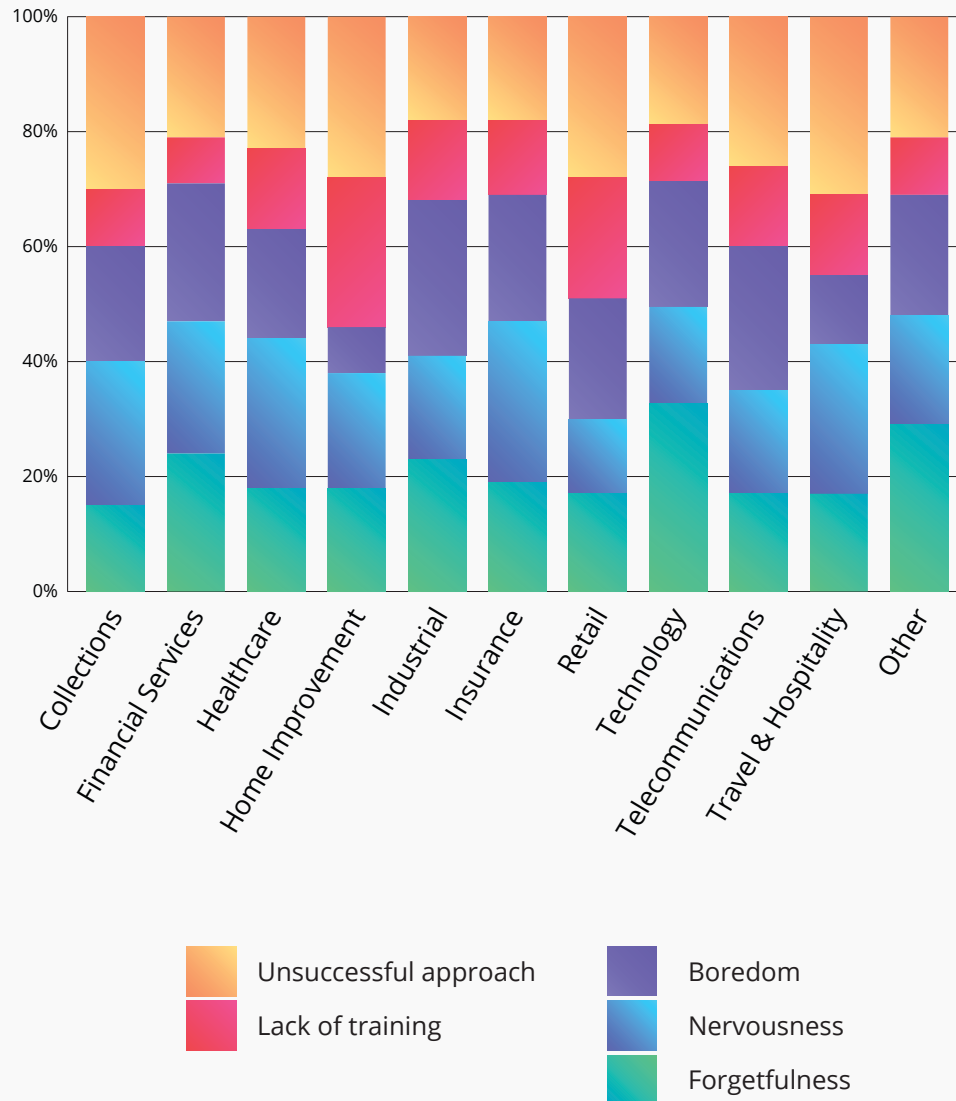
### Industry

Agents in financial services and technology industries ranked forgetting as the top reason for making mistakes (24% and 33% respectively).

Retail, travel & hospitality, home improvement, telecommunications and collections all attributed most of their mistakes to their company's training not being effective (28%, 31%, 28%, 36%, 30% respectively).

Agents within the healthcare and insurance industry reported nervousness as the leading reason for mistakes (26% and 28% respectively).

Agents in the industrial industry claimed their mistakes were mainly due to boredom (27%).



# Key Findings



65%

of agents report that the primary reason they make mistakes on a call is due to human error, including forgetfulness, nerves, and boredom. Meanwhile, only 35% of agents attribute their mistakes to gaps in company training.

24%

The #1 reason agents make mistakes on a call is due to forgetting the right thing to say. Training is not the issue, but rather a lack of ongoing reinforcement of what they learned.

Agents with 0–4 years of experience ranked forgetting as the largest factor of making mistakes, while agents with 5+ years of experience ranked boredom as their leading cause.

# Which Training Tools Are Helpful?

## Overview

We asked the agents to classify 7 training tools as helpful, unhelpful, or neutral:

- QA scoreboard
- 1-on-1 coaching from your manager
- Nesting period
- Customer satisfaction (CSAT) surveys
- Listening to call recordings
- Company training
- Asking other agents for suggestions

### 83%

Find company training helpful

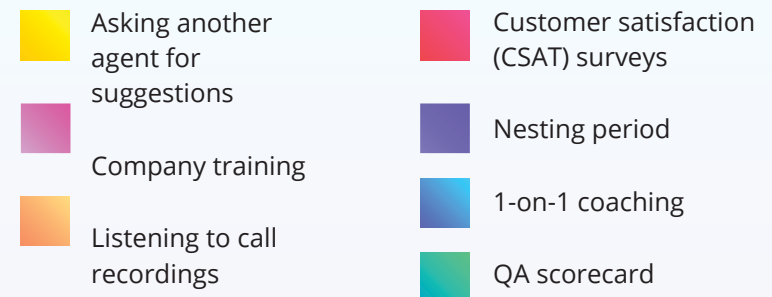
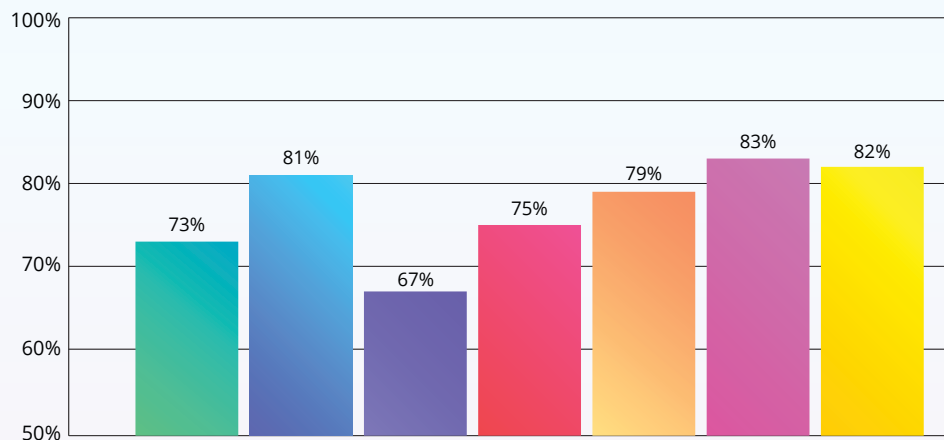
### 82%

Find asking another agent for suggestions helpful

### 81%

Find 1-on-1 coaching helpful

*The top 3 highest rated helpful training tools across experience, use case and industry*



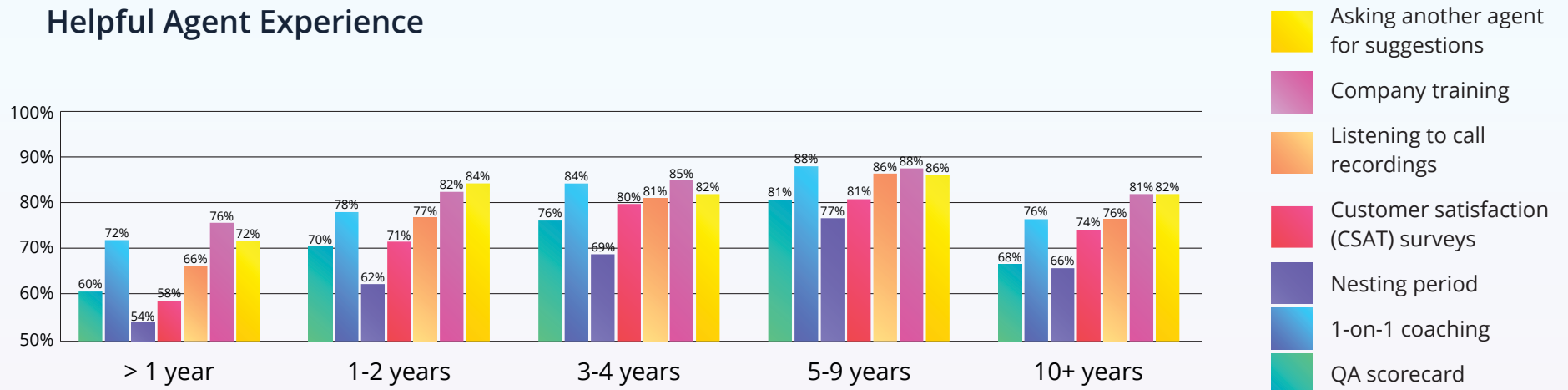
## Agent Experience Level

Appreciation for training tools among contact center agents seems to grow as the agent gains experience. This may be due to the training tools having a high learning curve, making it harder for the less experienced agents to fully utilize them.

Agents in all levels of experience ranked company training as the most helpful resource. That ranking only increases as the agent continues in the role year over year, before losing some effectiveness after 10+ years of experience.

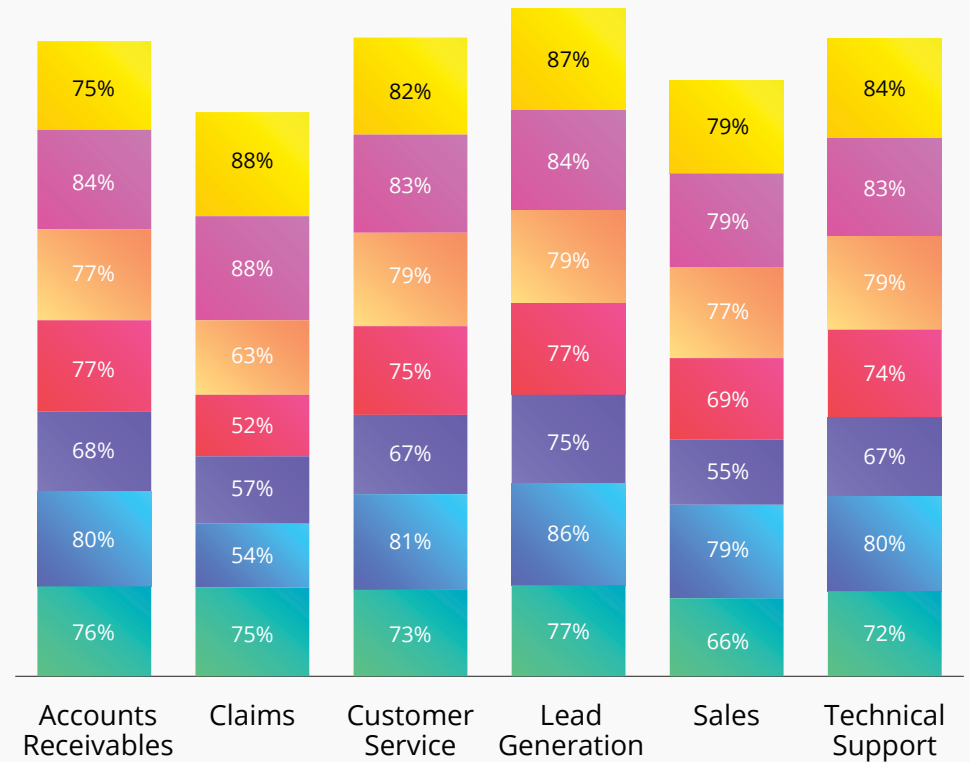


## Helpful Agent Experience



## Use Cases

Reliance on company training consistently ranked high across all use cases. Leads generation and technical support were the only two use cases that ranked asking other agents for suggestions slightly higher than company training. Meanwhile, nesting period was ranked the lowest across all use cases.

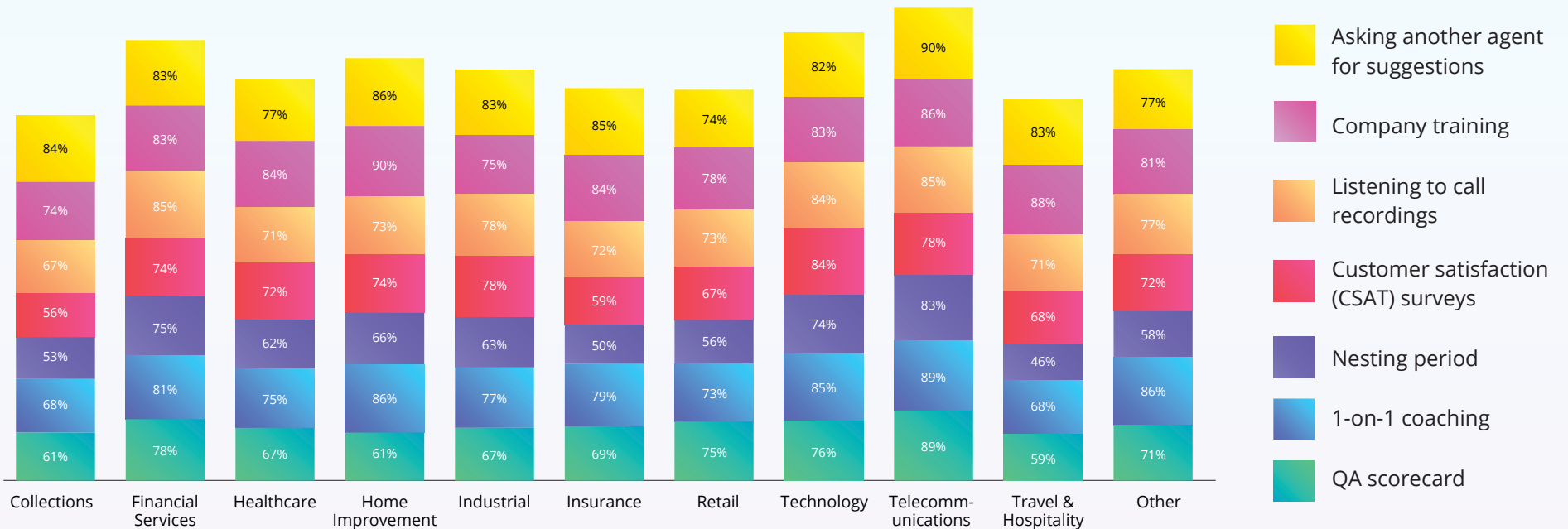


## Industry

While most agents still ranked company training, asking another agent for suggestions, or 1-on-1 coaching from your manager as the most helpful tool, financial services agents ranked listening to call recordings as the most helpful.

As for the most unhelpful tools:

- Retail and telecommunications ranked listening to phone calls as the most unhelpful
- Insurance and collections agents ranked customer satisfaction (CSAT) surveys the most unhelpful



## Key Takeaways

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The top 3 training tools agents find useful are company training, asking agents for suggestions, and 1-on-1 coaching from your manager, respectively.

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The QA scorecard was ranked the most unhelpful across almost all use cases and industries. QA scorecards may be more valuable for management as a performance measurement tool rather than a useful training tool.

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Agents with less than 1 year of experience had the overall lowest helpfulness ranking for every training tool, which may serve as a revelation that agents cannot fully utilize training tools in the beginning because of a high learning curve.



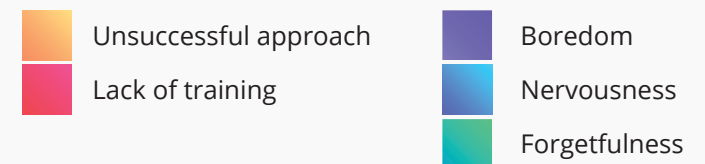
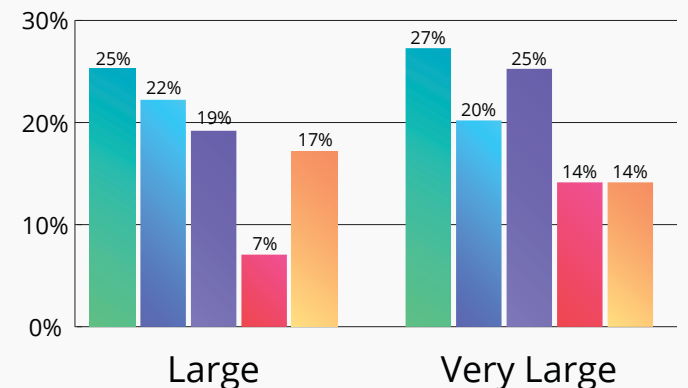
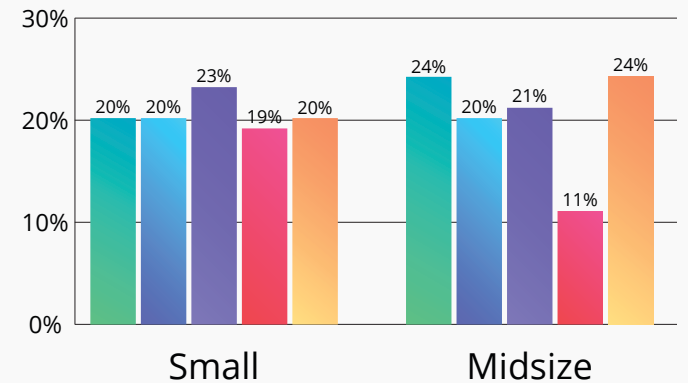
# Findings by Company Size

## Mistakes

The percentage of agents reporting they forgot the right thing to say as the primary reason they made mistakes increased based on the company size. In other words, the problem with agents forgetting what to say increases as a company grows.

Inversely, not being trained on how to handle a situation and being bored of saying the same thing every time decreased as the company size increased. But, the rates for these responses begin to increase again once companies reach 1,000+ agents.

While agents in small to large companies had several top contenders for making mistakes on calls, agents in very large companies (1,000+) selected "I forgot the right things to say" 3-14% more than any other choice.

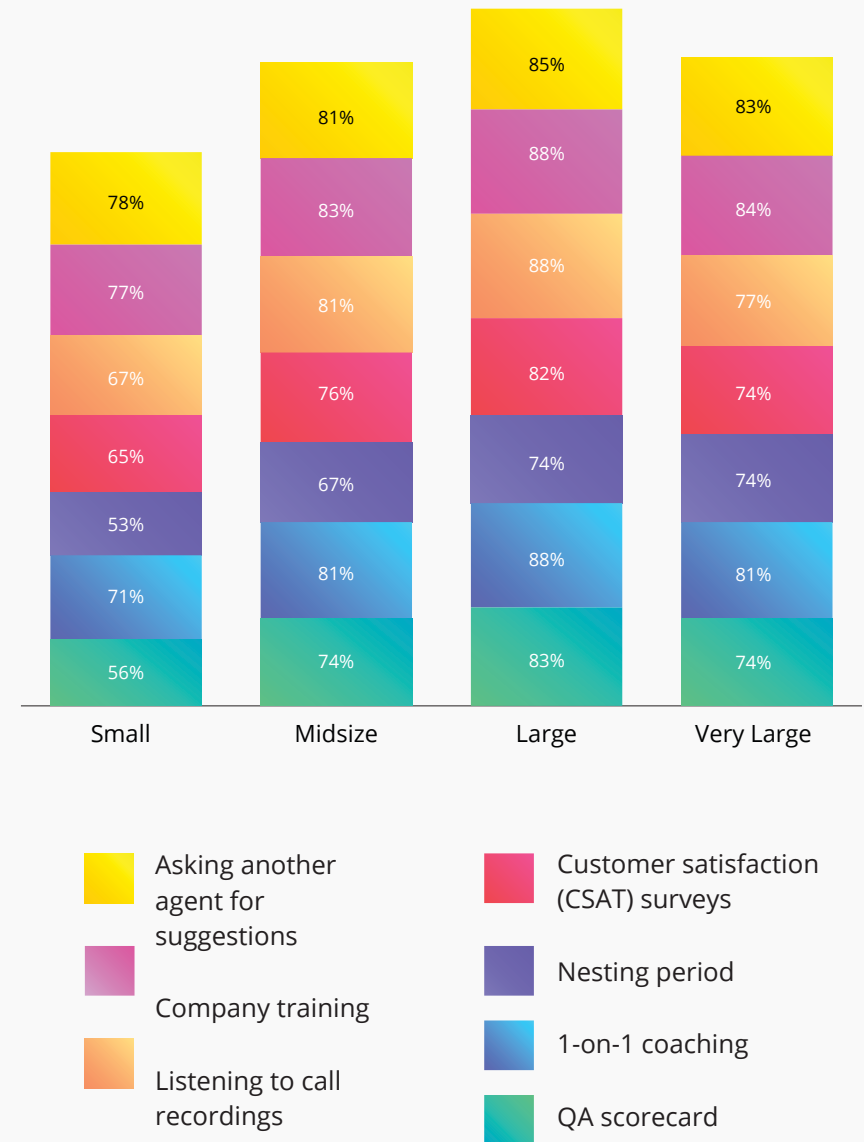




## Training Tools

Almost unanimously, company training was ranked the most helpful tool, QA scoreboard was ranked the most unhelpful training tool, and a nesting period was ranked the most neutral across all company sizes. When we look by company size, we found that:

- Agents on a small team (5–20 agents) had the overall lowest helpfulness ranking for every single training tool. In fact, their average helpfulness rating was 11 percentage points lower than the next lowest team size. This may be due to a lack of testing the effectiveness of the training materials and a less formal or standardized process.
- As companies scale, the average helpfulness rating for training tools increases likely due to having a more standardized training system.
- Companies start to see a decline in helpfulness once a company reaches 1,000+ agents, possibly due to issues with scaling their training tools.



## Key Takeaways

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Almost unanimously, company training was ranked the most helpful tool, QA scoreboard was ranked the most unhelpful training tool, and nesting period was ranked the most neutral across all company sizes.

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As companies scale, the average helpfulness rating for training tools increases. However, possibly due to issues with scaling training, companies start to see a decline in helpfulness once a company reaches 1,000+ agents.

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Agents in very large companies (1,000+) chose “I forgot the right things to say” significantly more than any other answer choice.



# Next Steps for Contact Center Success

Based on our analysis of these survey results, we have found 4 different solutions that may help your contact center increase success rates.

## 1. Evaluate Your Processes

Although it is a basic step, not enough contact centers take it. You should evaluate what is and what isn't working by looking at key indicators such as CSAT scores, conversion rates, ramp time, and average handle times. The first step is to know what your company's strengths and weaknesses are and where your agents may need more support.

## 2. Identify Ways To Engage Your Agents

Based on the survey results, your more experienced agents are most likely bored with their scripts, which is a large reason why agent retention is very low for most contact centers. Methods for engaging your agents could include:

- Creating a competition to gamify their tasks
- Collecting feedback to gather insights and address concerns
- Asking for input on new playbook strategies

### 3. Optimize Your Training

Training tools related to coaching were cited as the most helpful resource by agents across almost all use cases, experience levels and industries. This is an area that you want to make sure is as strong as it can be.

However, training is not enough since many agents also cited that they forget what to say on the call. It's important to reinforce training materials with:

- Up-to-date and easily accessible training materials. Maintain a training repository for agents to reference regularly to learn at their own pace and build confidence.
- Strategies for testing and tracking best practices. Help agents and managers understand which approaches are resonating with customers and which are turning them away.

### 4. Use the Right Technology to Support Agents in



## Real-Time and at Scale

Post-call analytics have become a standard tool for contact centers. While it's useful in gathering data, it's often too late for the customer. The most common reasons for making mistakes are during the call, so post-call tools can't help agents when they need it the most. Many contact centers are turning to real-time technology to provide their agents with guidance in the moment.

Real-time guidance prompts agents with the best things to say live, on every call. Agents largely ranked company training as a helpful tool, so being able to offer live training during an active call would make the impact of training that much more effective. It would also help eliminate many of the common reasons agents cited for making mistakes, such as forgetting, nervousness, and boredom, and provides managers with insight into what is and isn't working.

**You can learn more about real-time guidance and how Balto's real-time guidance platform is helping contact centers increase conversions, decrease ramp time and deliver a world-class customer experience at: [balto.ai/real-time](https://balto.ai/real-time).**

