

# How Appreciative Inquiry (AI) Coaching Skyrocketed NPS by 142% for a Fortune 100 Financial Leader



## Company Overview

As a Fortune 100 financial leader, our client is a global trailblazer known for responsible growth and exceptional customer service. Committed to fairness and integrity, they deliver top-notch financial solutions for a brighter future.

## Highlights

"Project Metamorphosis" empowered Unit Managers (UMs) through "Coach the Coach" training, combining theoretical AI principles with practical skills like the Gradual Release of Responsibility model and role-playing. This hands-on approach equipped UMs to coach effectively, fostering a culture of strength-based growth and driving positive results.

## [24]7.ai Services

CX Services - Voice and Chat Agents

## Solutions

Project Metamorphosis : integrating Appreciative Inquiry (AI) principles within our coaching model. That focused on leveraging the positive aspects of performance to drive continuous improvement.



## Financial Services Leader: A Fortune 100 Championing Customer Experience

Our client, recognized as a Fortune 100 company with a global presence, is a trailblazer in the financial services sector. Committed to fostering growth and economic progress responsibly, they stand out for their dedication to delivering top-notch financial services. Upholding principles of fairness and courtesy, they prioritize providing exceptional customer service, ensuring that customers are treated with respect and integrity.

## Constantly Evolving CX Expectations

In today's rapidly evolving CX environment, technological advancements have transformed customer interactions. Simpler queries are increasingly handled by self-service channels, while frontline support teams face a surge in complex inquiries. This shift demands elevated expertise and problem-solving skills from frontline representatives, posing a significant challenge. The downstream impact on frontline support activities and processes necessitates a strategic re-evaluation to maintain exceptional customer experiences (CX). We pinpointed several key areas requiring enhancement to address these challenges.

- The client's continually evolving demands necessitated an agile and dynamic operational model on our part. Our then-current approach may not have fully aligned with the speed and flexibility required to meet these evolving needs effectively.
- While we maintained a steadfast commitment to delivering quality service, selected performance metrics indicated that there was still potential for further improvement. This suggested that our then-strategies may not have been fully optimizing our service delivery capabilities.
- The intricacy of our pre-existing coaching model posed challenges in fully engaging agents and harnessing their individual strengths. This complexity may have hindered our ability to maximize agent performance and deliver the exceptional customer service our client expected.

Considering the rapidly evolving landscape of customer interactions and the increasing complexity of frontline support roles, it was evident that traditional approaches to training and development were no longer sufficient to meet the demands of the modern CX environment. Therefore, there was an urgent need for an adaptive training methodology that could dynamically respond to changing customer needs, optimize service delivery capabilities, and fully engage frontline agents while harnessing their individual strengths. We believed that by addressing these challenges head-on and implementing a tailored training approach, we would be better equipped to deliver exceptional customer service and navigate the intricacies of the tech-driven CX landscape.

## Business Outcomes



**31.5%**

Increase in Resolution satisfaction (R-SAT) scores



**142%**

Increase in NPS

## Elevating Service Excellence Through Appreciative Inquiry Principles

Our solution, **Project Metamorphosis**, was designed to not only elevate our service offering but also solidify our partnership with the esteemed client.

At its core was the implementation of **Appreciative Inquiry (AI)** principles within our coaching model. AI, a well-established methodology, focuses on leveraging the positive aspects of performance to drive continuous improvement. This approach stands in contrast to the traditional problem-centric methods, instead emphasizing strengths and successes as a foundation for growth.

In integrating AI into our coaching framework, we tailored the four key phases of AI - **Discovery, Dream, Design, and Destiny** - to fit the unique dynamics of our contact center environment. This involved -

- A thorough examination of what was working well (Discovery)
- Envisioning the ideal future state (Dream)
- Designing strategies to achieve that vision (Design)
- Aligning actions to ensure success (Destiny).

By infusing these AI principles into our coaching sessions, we aimed to create more engaging and effective interactions between agents and coaches.

The implementation phase of Project Metamorphosis was meticulous and thorough. We adopted a **"Coach the Coach" philosophy**, where experienced coaches led Unit Managers (UMs) through various scaffolding techniques, including the **Gradual Release of Responsibility (GRR) model** and **role-playing exercises**. This hands-on approach ensured that UMs not only understood the theoretical concepts of AI but also developed practical skills to apply them effectively in their coaching sessions.

Over a six-week period, our Unit Managers underwent intensive training and immersion in AI principles. This journey began with our Learning and Development (L&D) team aligning to fully grasp the concept of AI. Defined milestones and clear learning trajectories were established to ensure that UMs had a comprehensive understanding of AI and its application in their coaching practices.

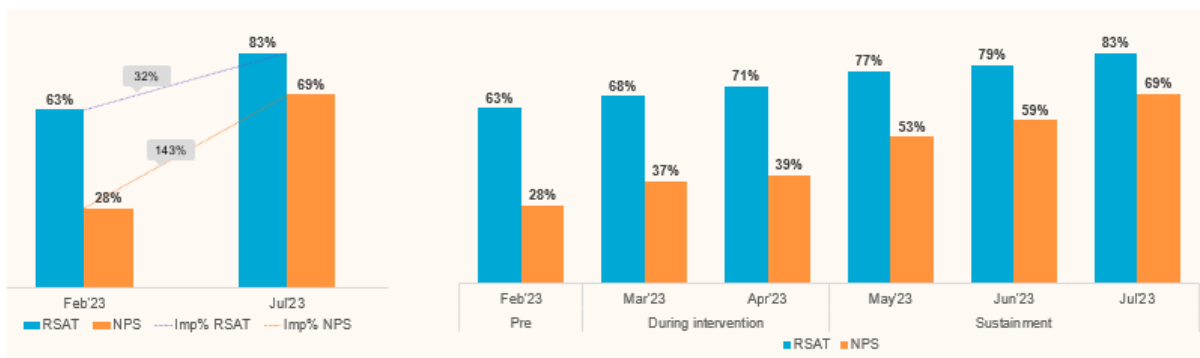
The results of our robust strategies were evident in the enhanced analytical prowess and forward-thinking approach displayed by our UMs. Audits and continuous feedback cycles confirmed the successful transition to the new coaching model, with tangible improvements in agent performance and client satisfaction. By embracing a strength-centric approach through AI, we not only addressed challenges more efficiently but also energized our organization towards sustained growth and operational excellence.

## Impactful Results Achieved

With the introduction of Project Metamorphosis, our customer interactions underwent a profound transformation, resulting in remarkable improvements across critical metrics. Resolution satisfaction (R-SAT) scores soared by an impressive 31.5%, while NPS experienced a substantial surge of 142%. These remarkable advancements not only met but exceeded our client's expectations, solidifying our strategic partnership.

Beyond the numerical achievements, a closer examination of agent conversations revealed a notable increase in confidence levels and the effective utilization of individual strengths to address areas of improvement. This transformative shift validated the enhanced capabilities of our agents and their trajectory of performance.

Our journey did not conclude with these initial interventions. A meticulously tracked Month-on-Month (MoM) growth trajectory illustrated a sustained progression, ensuring that the improved performance was not a fleeting spike but a lasting evolution.



## Testimonials

While the quantitative results are impressive, the true measure of Project Metamorphosis's success lies in the testimonials from those directly involved in its implementation.

Here's a glimpse into the impactful feedback shared by our Unit Managers and agents:

### Positive Emphasis

"Highlighting positive interactions effectively motivated our agents."

### Focus on Strengths

"Concentrating on our strengths motivated us to perform better."

### Result-Oriented Clarity

"The sessions provided clear, result-focused vision."

### Enhanced Agent Awareness

"Training helped us understand and appreciate the significance of our roles."

### Inquiry-Based Learning

"Adopting the method of asking questions proved to be a beneficial coaching tool."

### Affirmed Success

"These testimonials affirm the effectiveness and transformative potential of our new coaching approach."



## Contact us

To know more visit: [www.247.ai](http://www.247.ai)

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