



→ Nelly for Performance

WHY NELLY FOR PERFORMANCE

Nelly for Performance supercharges the positive impact that Clever Nelly has on productivity and performance, whilst also providing a tangible return on investment.



"Clever Nelly's had more of an impact than we expected. We've seen some real changes in employee retention, a reduction in the number of customer complaints and a reduction in the amount of rework that's been needed as well. There've been improvements across the board."



65% REDUCTION IN COMPLAINTS



WHAT IS NELLY FOR PERFORMANCE?

Nelly for Performance is an approach that centres around having a clear and measurable purpose for your Nelly content. An approach that drives tangible business benefits, can be tracked every month or quarter and is continually monitored to ensure maximum return on investment.

HOW IT WORKS

Nelly for Performance partners you with a member of our Performance Team who will work closely with you and your MI/KPI data to:

- ✓ Scrutinise your data and identify the areas for the greatest performance improvement.
- ✓ Tailor content and questions to target underperformance.
- ✓ Analyse and track performance improvement, on a quarterly basis, including ROI measures.
- ✓ Review lowest performing questions and provide recommendations for improvement.

KPI MEASURES

The KPI Measures that reflect the core performance targets for most customer use cases.

- ✓ QA failure reduction
- ✓ First Contact Resolution (FCR)
- ✓ Average Handling Time (AHT)
- ✓ Customer Satisfaction (CSAT)
- ✓ Employee Satisfaction (ESAT)
- ✓ Complaints Classification
- ✓ Complaint Reduction

Aligning your content with these metrics ensures measurable improvements in business outcomes through competency improvement.

TYPICAL OUTCOMES

13%

Increase in
First Contact
Resolution (FCR)

9%

Improvement
in Quality
Scores

20%

Reduction in
reportable
complaints

30%

Reduction in
people-based
errors

SUMMARY

Competent and confident employees deliver better customer outcomes. They are more effective and efficient, and they will stay with your business longer. Nelly performance takes the natural benefits of Nelly interactions and supercharges the impact. By aligning your content directly to behaviour and process improvements, KPI and quality measures will be significantly improved.

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Additional Information

Clever Nelly exists to embed the knowledge consumed by employees in your training; closing knowledge gaps as well as sign-posting any areas of risk due to sub-optimal knowledge and competence.

For Nelly to drive maximum effectiveness both in competence and performance, it is important to set out with a clear purpose, in the form of clearly defined success measures and targeted KPIs.

Success measures should be defined at both the strategic and operational levels at the outset of the project and revisited regularly to ensure they remain relevant and effective. At this point, the impact of not improving in this area, should also be considered.

OUR KPI MODEL FOR CONTINUOUS IMPROVEMENT**CONTINUOUS CYCLE**

Once we have analysed the initial business impact of Clever Nelly, we will then continue to refine our approach (based on the correlation between performance data and Clever Nelly data) to ensure that maximum impact is being made to your chosen KPIs – targeting areas that the data is highlighting.

 DISCOVER**Understanding your strategic priorities and operational challenges**

We work with your Senior Leaders and Operational Leads to define success measures at both a strategic and day to day operational level. We run discovery sessions to ensure we are fully aligned and understand the key priorities. It's critical that what we input into Nelly from the start is aligned to the areas that will ultimately improve business and employee performance. We'll look to understand:

- ✓ *How does Nelly align to your overall strategy?*
- ✓ *What are the key performance measures that need focus? (e.g. Complaints, First Contact Resolution, Quality)*
- ✓ *Why does the focus need to be here and why now?*
- ✓ *Do you have set targets to achieve against these measures?*
- ✓ *What is the impact on you and the business if you were to achieve this?*

 DEEP DIVE**Scrutinising your data to identify opportunities for performance improvement**

Our Performance Team will analyse your data based on the success measures and KPIs identified. **The 3-step process:**

1. **Data** - Share your KPI data relevant to the proposed KPIs for performance improvement and we will outline the best methods and data required.
2. **Analysis** - Our Performance Team will conduct an in-depth analysis reviewing current performance and analysing the best areas for performance improvement.
3. **Agreement** - We propose and agree with Senior Stakeholders the exact targets for maximum ROI and associated metrics to be measured and analysed.

 CREATE**Identifying training content aligned with KPIs and authoring targeted questions**

Align - Once the measurable improvements and associated metrics have been agreed, our Performance Team will then work closely with you to ensure that the content you've selected aligns appropriately, for targeted question writing.

Plan - The team will work with you to create a "map" of the most important areas of your training and the KPIs you are seeking to improve. Questions will then be planned using a variety of media and approaches to bring the content to life and maximise competency improvement.

Create - Questions will be designed based on your specific aims and requirements, allowing us to map and track competency scores with performance improvement.

Once your first set of questions has been authored, we will hold a review session to ensure the content is as powerful as possible. After 4 weeks of the questions being live in Clever Nelly, we will then review your lowest performing questions to analyse and identify why they may not be performing, and amend any questions and/or answers accordingly.

We offer a variety of upskilling in question authoring and reviewing. Our question writing workshops, alongside deep dives into our authoring process will help unlock your business's full potential with Nelly.

REVIEW

Review of question performance and analysis of KPI data to demonstrate impact and ROI and identification of next steps

Data Analysis

Once Clever Nelly has been successfully implemented, we continuously analyse your data to track the agreed KPI improvements, reporting back to you and providing recommendations. Our analysis is thorough and focuses on continual gains and improvement so you can be sure Clever Nelly is achieving measurable results.

Our data analysis includes;

- ✓ Comparisons of your current KPIs to pre-Clever Nelly implementations
- ✓ Rolling comparisons of KPI data quarter vs. quarter
- ✓ Discussions and recommendations of any anomalies
- ✓ Tracking KPI data against Clever Nelly data (engagement & competency)
- ✓ ROI calculations based on improvements
- ✓ Suggestions for future areas of improvement

Throughout the process we continuously work with you to assess your KPIs and highlight future ways Clever Nelly can be incorporated for measurable results. We get to know your data – suggesting new angles we can explore, areas to analyse and ways our analysis can be more comprehensive.

Question Performance Review

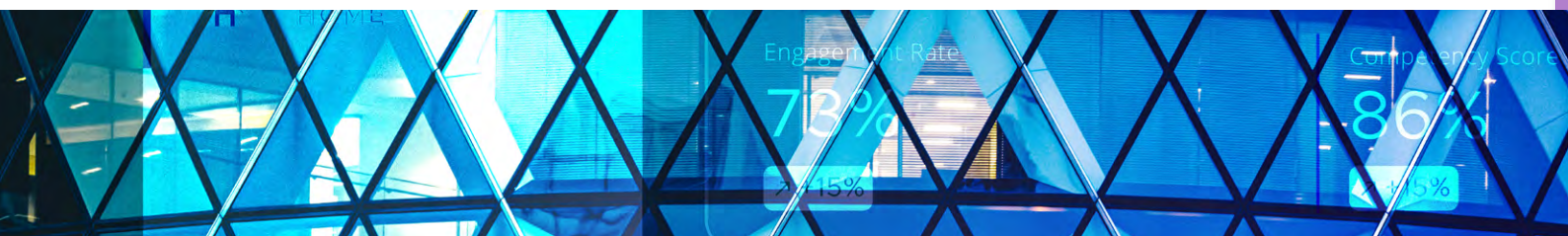
The question performance review takes the Bottom 10 performing questions and gives a detailed analysis on the possible reasons for this; identifying potential knowledge gaps, suggesting question improvements and allowing us to dig deeper into the patterns around performance.

Our Bottom 10 Review includes;

- ✓ Knowledge Rate % (Explanations and recommendations on the bottom 10 performing questions)
- ✓ Time to Answer (consider the average time for these questions, according to answer options)
- ✓ % split of answers (consider the selection data of all answers, related to each question)
- ✓ Question Distribution (consider how many times the question was answered relative to the number of users)

Recommendations provided based on analysis and insights:

- ✓ Question Alterations
- ✓ Answer Alterations
- ✓ Further training focus
- ✓ Note Suggestions



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FAQs

What KPIs do you typically analyse and track?

Telephony Metrics

- ✓ Average Handling Time (Hold and Talk Time)
- ✓ After Call Time (Wrap)
- ✓ First Contact Resolution (Internal transfer volumes)

Sales Metrics

- ✓ Sales conversion rates
- ✓ Average order values
- ✓ Lifecycle of a sale (reduction in overall time, pinch point identification)

Customer Service

- ✓ Complaints (volume of complaints, highest costing mistakes, days to close complaints, how many employees it takes to close a complaint on average)
- ✓ Query volumes (internal queries from employee to supervisor)
- ✓ Productivity levels

General Efficiency Metrics

- ✓ QA levels
- ✓ Process Adherence Levels
- ✓ Error rates
- ✓ Risk reduction – identifying areas of weakness

New Starter Metrics

- ✓ Speed to competence
- ✓ Onboarding proficiency

What data do you require?

Any data relating to your chosen KPIs. For example, if you're focusing on AHT, agent and teams talk, hold and wrap time each month would be required. Individual employee level data is helpful to assess the existing range of performance by employee.

How often does data need to be provided?

We track data per month and compare quarter to quarter, so monthly data should be provided to us regularly before each quarterly review.

What timeline should the data cover?

We recommend providing data of at least 6 months pre-Clever Nelly, preferably more, so we can accurately assess the baseline with fluctuations and compare once Nelly is implemented.

What format should the data be in and how do we provide it securely?

We recommend sharing data in Excel, via SFTP transfer.

What level of detail should the data have?

We prefer more detail to less detail, so we can analyse from all angles. For example, if your KPI is AHT, we'd recommend a per agent breakdown and not overall averages.

Will my data be protected?

Yes. EDF follow all GDPR and Data Protection Laws.

What if the way we store or track our data changes?

No problem. As long as this is explained to us, we deal with any changes in the way you track, measure or store your data.

How can we make sure the questions align with the data?

We work with you to provide recommendations on the best content you can provide to us based on your KPIs. Once we've agreed this, our experts will base the questions on this content, focusing on your specific requirements.

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Case Studies



Clever Nelly has been instrumental in reinforcing our renowned approach to individual employee learning. **It ensures we can continually embed key learning concepts and quantify the impact of learning on our KPIs.**



We have **not identified a single instance** where the AI has failed to improve employee knowledge and positively impact in-role performance.

CASE STUDY: LIVERPOOL VICTORIA

Liverpool Victoria **reduced complaints** by a staggering 62.5% with Clever Nelly.

62.5%

Reduction in complaints.

30%

Improvement in
'identifying complaints'
competency score.

183,000

Personalised knowledge
interventions.

RESULTS GENERATED BY:



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Case Studies

CASE STUDY: MONEYBARN

Moneybarn saw a **300% ROI from Clever Nelly** in just 6 months, equal to circa. £100k* derived just from AHT reduction across 150 agents.

4.5%

Reduction in Average Handling Time (AHT).

38%

Reduction in Average Hold Time.

9%

Improvement in the achievement of fair, good and great outcomes

RESULTS GENERATED BY:

moneybarn
Vehicle Finance

*Industry average of £20 per hour

CASE STUDY: NEWDAY

“One of the most important points about driving great customer service is knowledge and confidence - **that's why we use Clever Nelly.**”

35%

Reduction in Call Hold Time.

28%

Reduction in After Call Work.

7%

Improvement in Quality Assurance.

18%

Improvement in agent knowledge.

RESULTS GENERATED BY:

New Day