

# RootCalls

## Why RootCalls?

- **Insight & results**
  - We will find new opportunities for immediate savings
- **Unique fresh perspective**
  - Not biased by your call center's current categorization schemes
  - Not based on agents selection of call type from a 'pull-down' menu
- **Expertise & experience**
  - Senior process/workflow & customer care professionals
  - Comprehensive and efficient profiling tools
- **Cost effective & fast**
  - Flat fee or contingency
  - One week turnaround

CONTACT: Kelvin Cross

**RootCalls** LLC

197 8th Street, PH203  
Boston, MA 02129

Phone: 617-275-3007

kelvin@rootcalls.com

## From Insight to Impact

**Customer calls provide a goldmine of opportunity.**

**We analyze content and identify root causes.**

We work to answer three key questions:

1. To what extent is your call volume unnecessary and preventable?
2. What preventive actions can you take that will result in fewer calls?
3. What will be the financial impact of taking such actions?

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### **Saved \$2 Million for a Retail Bank and Greatly Improved the Customer Experience**

**Achieved by eliminating ½ the unessential calls ...**

- Through better managing customer expectations at enrollment about check clearing times & related appeals process
- ~50 employees freed up (as call volume dropped)

**... and then streamlining call time (for the remaining calls)**

- Eliminated 're-verifying the customer' for ~2/3 of the calls
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## The RootCalls Process

**Enable us to hear 10-15 hours of randomly selected calls**

- Plus provide info re: staffing, call volumes, call center reports

**We will listen and profile the calls using *RootCalls*<sup>SM</sup> Analytics**

**Within a week or two you will receive a PowerPoint summary:**

- A profile of types of calls and causes of calls
- Quantity, quality, and time per call
- A profile of what goes on during a call
- A prioritized listing of opportunities & actions
- An estimate of impact on staffing