

**INDUSTRY**

Voluntary Benefits Solutions

**UC PLATFORM**

Avaya

**GOAL**

Automate Agent Audits

<https://www.trustmarkbenefits.com/>

**TRUSTMARK SOLUTIONS**

Trustmark provides access to a full spectrum of flexible benefit solutions, including benefits administration, payroll-deducted voluntary products, group medical benefits, and health and fitness management programs. Trustmark subsidiaries and operating divisions include CoreSource, HealthFitness, Starmark and Trustmark Voluntary Benefit Solutions.

What began as a one-desk office in Chicago circa 1913 has grown into a nationwide network of companies employing more than 4,300 people and serving millions of customers. Now and in the future, Trustmark remains a mutual holding company managed for the benefit of its clients.

The success of each Trustmark company is based on building and maintaining trust through personal, responsive service and flexible benefit solutions.

## THE CHALLENGE IN TRUSTMARK CONTACT CENTERS

Like many Trustmark contact centers, the office in Mequon, Wisconsin, is dedicated to providing the best service to customers.

Supervisors there were so committed to improving service and training programs that they spent significant time and effort “live” monitoring and assessing calls in progress and then manually compiling results. These audits included ten different evaluation criteria. The results were subsequently shared with agents.

The auditing process was tedious. They were unable to jointly review the actual call with the agent to better understand the audited results. Trustmark needed a better solution.

Carilyn Carlson, Administrative Manager, explains, “We needed a more automated way of auditing agents’ phone calls without doing the old-fashioned call/observe or live monitoring.”

Beverly Bolz, Trainer and Documentation Specialist, also commented that, “The Company needed the ability to select and review certain recorded conversations in order to focus on areas that required training.”

**“From an employee’s perspective, they really appreciate being able to hear the calls themselves. If they lost any points on the audit, for example, they are now able to listen to what was actually said first hand. The employee and supervisor are then able to jointly review and discuss how the agent can improve. That has been very popular.”**

### **Beverly Bolz**

Trainer & Documentation Specialist  
*Trustmark Voluntary Benefit Solutions*

## SOLUTION

Having checked with other Trustmark offices that were already using Encore®, the Mequon office determined Encore would not only automate its quality management process and meet its requirements, but also work well with the upgrade of its Avaya communication (phone) system which was taking place at the same time.

The Encore solution installed in the Mequon office includes Encore’s CT (Computer Telephony) Integration for a hybrid Avaya solution, using both VoIP and digital station sets.

The Encore CT integration ensures accurate recording and easy retrieval of recordings for all calls, as well as delivery of caller specific information, such as the customer’s phone number or agent name, into the recording database for enhanced search and retrieval of recordings.

Encore also includes an easy-to-use evaluation form builder, an efficient method for reviewing voice and screen recordings to score agents’ performances and the ability for agents to listen to their own recordings. As it continues to refine its quality management process, Trustmark plans to leverage other applications included in the solution, such as automatic eCoaching and call calibration.

## RESULT

Once Encore was installed, Trustmark set up an initial evaluation form in Encore based on key points covered in Trustmark's Customer Service training. The automation and rich feature set provided by Encore has saved Trustmark time when evaluating agents and, with the ability to listen to recordings, has greatly improved coaching sessions.

Bolz adds, "From an employee's perspective, they really appreciate being able to hear the calls themselves. If they lost any points on the audit, for example, they are now able to listen to what was actually said first hand. The employee and supervisor are then able to jointly review and discuss how the agent can improve. That has been very popular."

This first effort has been very successful. The Mequon office is now ready to implement more complex evaluations to review processes and look for areas that might need attention or improvement. Trustmark is looking forward to taking advantage of Encore's eCoaching. This application automatically sends a coaching assignment with a link to an eLearning session if an evaluation question's score is below a certain threshold on a key performance indicator. eCoaching allows training to occur even when supervisors are busy with other tasks.

Trustmark expressed complete confidence in DVSAnalytics Customer Support. Bolz mentions, "Whenever we have issues, we are able to get them resolved quickly."

**"One of the reasons we implemented the system was to have a more automated way of auditing agents' phone calls without doing the old fashioned call/observe or live monitoring."**

**Carilyn Carlson**

Administrative Manager  
Trustmark Voluntary Benefit Solutions

