Call analysis and call summary

Call summaries for agent calls

With the number of calls that agents make throughout the day, it would be very intuitive and easy for agents to have access to summaries of the calls they made to clients. Keeping notes and referring to recordings can only take you so far and also can take time. And time is money.

As a system that has always been using AI and intelligent systems to push forward the collections industry, we have brought in an AI to help the agents take a quick look at the calls they made.

The AI tool will not only summarize the full call that an agent has made, but will also analyze the call to bring attention to important points within the call, for example; if the agent said the mini Miranda to the consumer.

All this and more will is available in this exciting new feature in RMEx.
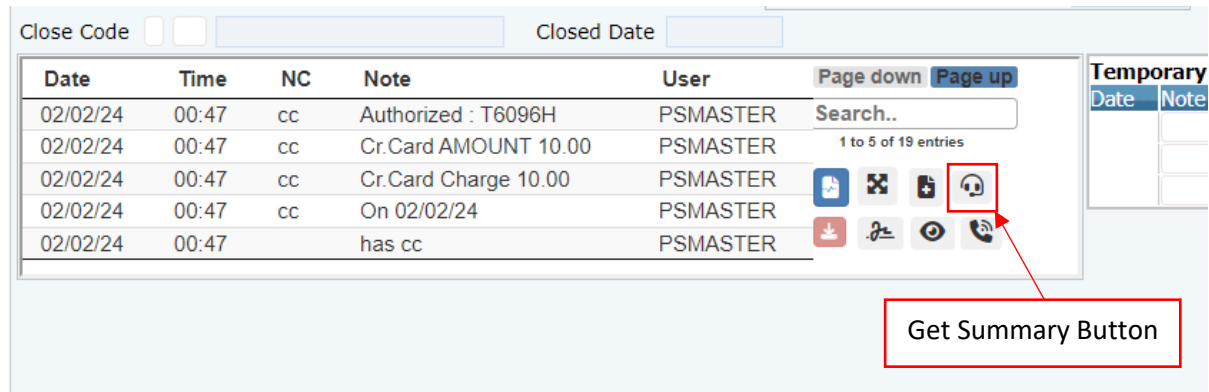
Call summary setup

Please contact Quantrax to get set up with the call summary feature and to get started with training programs for agents as required.

Usage and features

All call summary related features are available in the new notes area in the GUI.

Once a call is made, the agent can click on the generate call summary button. The Agent will then be shown a list of calls that were made to that account.

Get Summary Button

Clicking on the get summary button next to the call will enable the AI to go through the call and to generate the summary. Depending on the call length and clarity of the call, this might take some time.

The agent will then be given the option to either view or edit the summary and transcript of the call, and to save any changes.

Click on the button for the call.

The summary popup also shows additional information on the call. The AI will always track if the agent gave the mini Miranda wording ("*This is an attempt to collect a debt*") to the customer on the call.

Based on the conversation, the screen will also display the confidence level of the call and customer to get better analytics on the calls.

Call Summary

1. This shows if the Agent mentioned the mini-Miranda in the conversation.
2. This shows the confidence level of the summary that is generated.
3. The first text box shows the summary based on the call. This can be edited if permission is given.
4. The second text box displays the transcript of the call. This can be edited if permission is given.
5. Clicking the 'Update' button will finalize any edits and save the call summary.

NOTE: The summary can **only** be edited once. After edits are saved, it cannot be edited again.

Only calls made on that day is available to be requested for call summaries. Once requested and saved, the saved summaries will be available in the account.

The agent can view the available summaries at any time by clicking on the call summary button.

Call Summary and Analysis

View Summary Button

Notes are also added on the account. The call summary can also be viewed by clicking on the linked call summary note.

Both will open a window with the available call summaries for that account.

The transcript is available in the text history window.

Preview All Call Summary
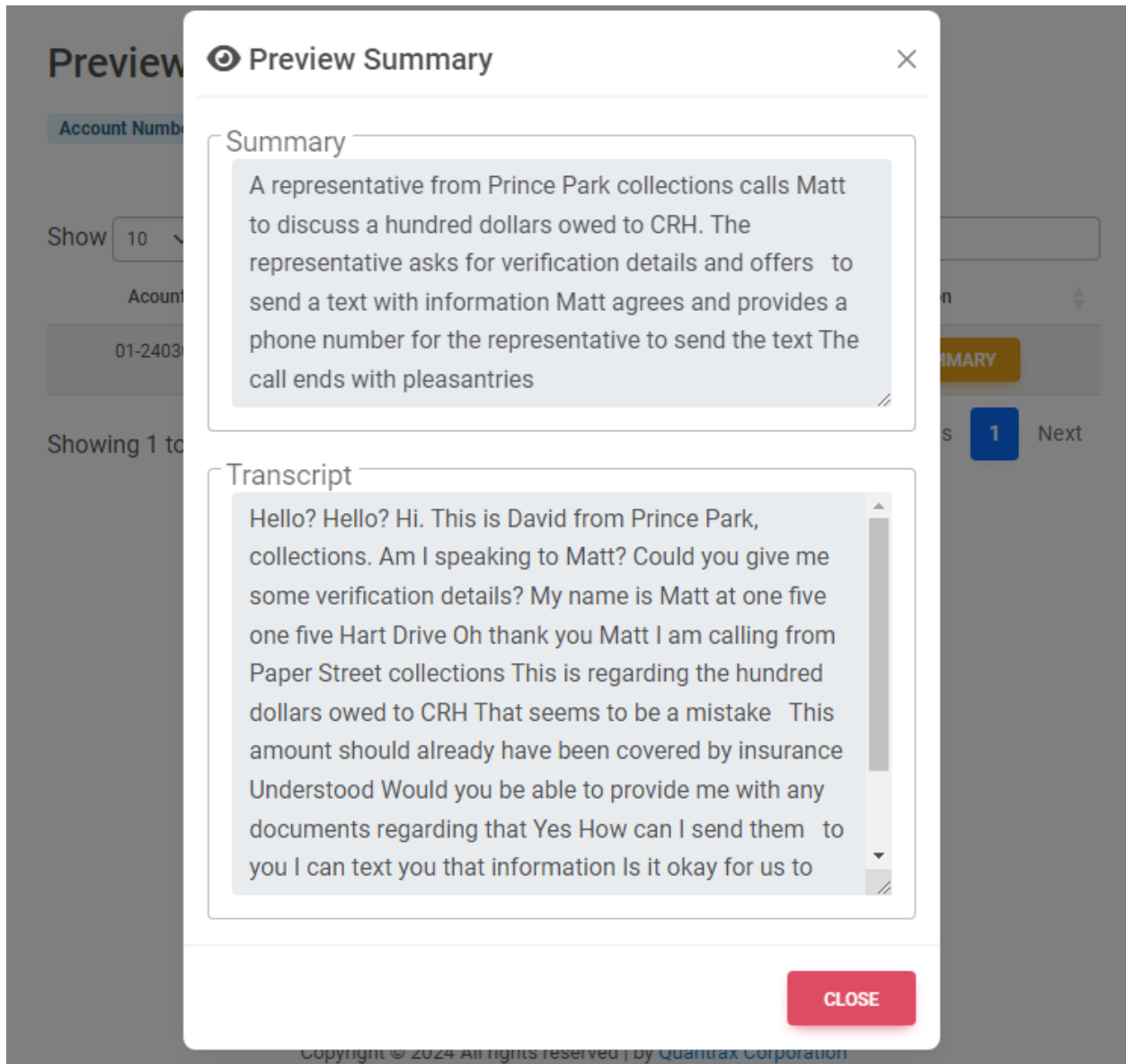
Account Number: 01-240300004

Show [10 v] entries   Search: [   ]

Acount No	Date	Time	Action
01-240300004	2024/02/01	02:02:24:AM	**VIEW SUMMARY**

Showing 1 to 1 of 1 entries   Previous [1] Next

The AI also uses the tone of the conversation or details that were said to generate the summary, taking into accounts things such as if the customer seemed confused on the call. The AI is always learning as well. With more use, the better and more accurate the summaries will be.

The agent can view the requested and saved summaries at any point.

This is just one of the many features that Quantrax and RMEX offers to make collections easier. Contact Quantrax for more information and get all the new features set up to use in your company.