RDI

RDI and CallMiner Partner to Drive Scheduling and Revenue Opportunities for Leading Education Provider

RDI + CallMiner Case Study

CallMiner

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Background & challenges

A leading childhood education provider set out to increase school tour appointments—a critical driver of enrollment and long-term revenue growth. But despite a longstanding partnership with a BPO vendor, tour bookings remained stagnant and inconsistent.

At the core of the client's challenge was a misaligned and inefficient quality assurance (QA) process. The existing QA scorecard, developed under a previous vendor, emphasized compliance and soft skills. It was essentially a "perceived" good service—absent any hard data to prove success—and failed to measure the specific behaviors that influenced whether a family booked a school tour, a critical next step towards family enrollment.

Even more limiting, the QA process was manual, reviewing only a tiny fraction of calls each week—just a few observations per agent. Feedback was inconsistent, subjective, and not scalable. Coaching was often based on the perception of what managers thought parents wanted, rather than on data-driven evidence of what drove results.

This blind spot left booking specialists without the actionable insights needed to improve performance. Opportunities were being missed, tour volume declined, and enrollment growth slowed.

Fundamental questions went unanswered: Why were parents not booking? What concerns were they expressing? Which talking points gave them the confidence to commit to a tour?

The client sought a partner who could answer these questions with measurable proof. In search of a data-driven solution, they turned to RDI—attracted by RDI's ability to combine analytics, technology, and operational expertise to improve efficiency and deliver outcomes tied directly to business success.

Industry

- Education

Use Cases

- Appointment setting
- Customer service resolution

Challenges

- Limited QA capacity per total call volume population
- Inconsistent agent coaching—coaching to perception
- Identifying overall booking opportunities

Solution

- RDI Interaction Analytics Team
- CallMiner Analyze

Results

- Standardized QA scorecard, built from interaction analytics and directly correlated to booking outcomes
- +16% increase in scheduled tours
- +12% increase in QA scores within 3 months—closely correlated with higher tour conversion rates

Solution

Hearing opportunity in every interaction with CallMiner

To reverse the plateau in tour bookings, RDI partnered with CallMiner to launch a conversation intelligence program powered by machine learning and advanced analytics. The objectives were clear: uncover missed opportunities, identify booking behaviors statistically correlated with conversions, and improve the tour-to-enrollment rate.

Instead of reviewing only two calls per agent per week, RDI leveraged CallMiner Analyze to evaluate 100% of customer interactions. This comprehensive view of performance revealed high-impact coaching opportunities and uncovered booking behaviors that had not been previously reported on the original QA form.

RDI worked hand-in-hand with the client's operations and marketing leadership and its own booking specialists—running focus groups, investigating real calls, and layering in insights—to validate which behaviors truly drove bookings. The result was a QA model that emphasized effectiveness, not just compliance, and directly linked frontline coaching to conversion outcomes. This structured roadmap began with QA automation, progressed through a pilot phase, and ultimately scaled across the enterprise.

Key steps in the process

1. Establishing a baseline: RDI built an automated QA scorecard and analyzed tens of thousands of call recordings. Using machine learning and statistical modeling, the team identified keywords that signaled parent interest, mapped behaviors correlated with bookings, and established accurate performance benchmarks.

2. Refining the scorecard: With the baseline in place, RDI collaborated with the client to tailor QA criteria correlated to booking effectiveness. Several of the most impactful behaviors now coached to agents were not part of the original QA form—they were discovered through data science, interaction analytics, and collaborative feedback with supervisors and booking specialists.

3. Launching a pilot: The new scorecard was piloted with 17 booking specialists across two teams. The impact was immediate—bookings increased by over 16% in two weeks. RDI continued refining the program throughout the pilot based on real-time performance data.

4. Scaling across the enterprise: After the successful pilot, the program expanded to the full team of booking specialists across multiple sites. To manage the "firehose" of data effectively, RDI developed custom Tableau dashboards tailored to supervisors' workflows. This ensured that insights were easy to use, actionable, and minimally disruptive to daily operations. Supervisors reported improved visibility, more effective coaching, and stronger engagement with QA dashboards.

Results: Turning insight into action and revenue

Through a collaborative, data-driven approach, RDI and CallMiner helped the client transform a manual, outdated QA process into a scalable, performance-focused model. By analyzing every call and aligning correlated coaching data with proven success behaviors, the initiative delivered measurable gains in both efficiency and revenue outcomes.

> *"RDI's speech analytics tool is probably the most exciting thing that we've been able to work with. We were able to pilot a program using a new call strategy that was developed based on findings from speech analytics. Their speech analytics team analyzed over 60,000 calls to find out what makes for a good customer experience and what makes our families more likely to take that next step with us."*
>
> *— Senior Manager of Customer Service, Leading Education Provider*

This firsthand feedback underscores how RDI's use of conversation intelligence directly shaped strategy and improved results—not just operationally, but for the families the client serves.

Key results

1. Performance gains: Tour bookings increased by over 16%, driven by better insight into customer conversations and coaching focused on high-impact behaviors. On average, booking specialists are now scheduling 2.2 more appointments per day compared to baseline performance.

2. Quality improvement: QA scores now reflect actual booking effectiveness. Within the first three months of rollout, QA scores improved by 12%, closely tracking with tour conversion rates—validating the correlation between data-driven QA performance and business outcomes.

3. Coaching efficiency: Supervisors now have full visibility into every booking call, supported by custom-built Tableau dashboards that translate massive volumes of data into targeted, easy-to-use insights. Coaching is faster, more personalized, and seamlessly integrated into existing workflows.

4. Client satisfaction: The client consistently reports high satisfaction with QA scorecards and dashboards built on total population data, aligned with meaningful metrics. Improvements in bookings are directly tied to revenue growth, reinforcing the strategic value of the program.

By aligning QA processes with real business outcomes, RDI and CallMiner helped this leading education provider drive measurable improvements in school tour appointment scheduling. With smarter coaching, machine learning–driven insights, and continuous refinement, the client is better equipped to increase enrollment, increase revenue, and deliver an exceptional customer experience.

About RDI

At RDI, we've spent more than four decades perfecting the art and science of customer experience. Founded in 1978, RDI has become an industry leader helping brands strengthen customer relationships through smarter communication, genuine human connection, and intelligent technology.

We believe world-class customer experience is built at the intersection of strategy, technology, and empathy. That's why we work side-by-side with our partners—not just to manage interactions, but to transform them. We turn conversations into insights, insights into smarter decisions, and smarter decisions into measurable outcomes. With deep industry expertise, forward-thinking use of AI and data, and a relentless focus on performance, RDI delivers people-powered solutions that drive loyalty, elevate results, and move businesses forward.

With a global footprint spanning onshore, nearshore, and offshore locations and a team of more than 5,000 strong, RDI isn't trying to be the biggest BPO—we're built to be the best partner: nimble enough to adapt, experienced enough to execute, and invested enough to care.

RDI

Pair human connection with conversational intelligence. See what RDI's AI + analytics partnership can do for your customer experience.

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