Zenarate AI Coach Improves Sallie Mae's Agent Training Process and Performance

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>
> *Diane Porter, Director of Education and Instructional Design, Sallie Mae*

Sallie Mae is the leader in private student lending, providing financing and expertise to support college access and completion. Sallie Mae offers products and resources to help students and families start smart in planning for higher education, ensuring opportunities to learn and dream big. Sallie Mae's mission is to power confidence as students begin their unique journey, believing college should be affordable, equitable, and accessible for all students.

Founded: 1972
Headquartered: Newark, DE
Industry: Consumer Banking
No. of Employees: 1,600

The Challenge

Sallie Mae's training organization noticed that their agents were spending most of their time in the classroom with traditional passive learning, and they noticed that their active learning role-play was effective but inefficient and not scalable. They asked an aspirational question they felt might be difficult to answer: Can we make hands-on active learning efficient and scalable while reducing overall training time? Can we automate our agent certification process to take live calls, and develop confident prepared agents who can deliver superior customer experiences starting with their first call?

Key Results

Sallie Mae's AI Coach is creating efficient scalable hands-on learning, accelerating agent speed to proficiency, and reducing overall training time. And Sallie Mae's AI Coach has automated agent certification to take live calls reducing certification time from 2.5 days to 2 hours.

The Solution

Sallie Mae found the answer to their aspiration question - Zenarate AI Coach. Sallie Mae uses their AI Coach for new hire agent onboarding and tenured agent upskilling. With Zenarate AI Coach, Sallie Mae uses AI Conversation Simulation to develop confident top-performing new hire agents before their first live call and close tenured agent skill gaps. By practicing with their Sallie Mae AI Coach, agents master hyper-realistic call and chat scenarios they encounter with live customers. And training managers easily track each agent's topic & skill proficiency and assess agent readiness to take live calls through their Simulation Scorecard & Immersion Call Listening.

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Sallie Mae Partners with Zenarate to Improve Agent Training Experience

Sallie Mae's Education and Instructional Leadership places emphasis on providing the best learning experiences for their agents, enabling agents to deliver superior customer experiences. A common challenge for training groups in large enterprises like Sallie Mae is improving agent speed to proficiency. Diane Porter, Director of Education and Instructional Design at Sallie Mae, recalls when the team noticed an opportunity to improve agent training, **"When we noticed too much time and resources were being spent on classroom training, we knew that we needed a solution that would not only decrease classroom time, but allow training managers to scale skill development, and improve new hire performance so they are confident and prepared when they take their first call."**

Sallie Mae needed a solution that could quickly scale their best and required practices across their enterprise. Zenarate's AI Coach helps Sallie Mae agents in learning, whether new hires mastering high impact topics they will face with live customers or tenured agents closing skill gaps, by immersing agents in real-life voice and chat simulation. Replacing agent-to-agent role-play was important to Sallie Mae, as human role-play is expensive, awkward, and difficult to scale.

Sallie Mae needed a solution that could quickly scale their best and required practices across their enterprise. Zenarate's AI Coach helps Sallie Mae agents in learning, whether new hires mastering high impact topics they will face with live customers or tenured agents closing call type and skill gaps, by immersing agents in

real-life voice and chat simulation. Replacing agent-to-agent role-play was important to Sallie Mae, as human role-play is expensive, awkward, and difficult to scale. Matt Wheeler, the Instructional Design Manager at Sallie Mae says, **"I remember the stress of sitting in class, trying to figure out how to do an awkward mock phone call with the agent next to me. And after all the classroom time, it would take me months on the floor before I felt comfortable in my call flow. After partnering with Zenarate, we saw immediate benefits for the new hires interacting with the AI conversation simulation. Our agents are hitting the floor at a much higher level of performance than we saw previously."** AI Coach allows agents to role-play with their personal unbiased AI Coach, and for training managers to see and hear agent topic and skill mastery in the platform.

Engage

Agents engage with their personal unbiased AI Coach on high impact call scenarios they will face with live customers.

Master

Agents master your Best & Required Practices with their Zenarate AI Coach simulating a customer while providing real-time feedback.

Perform

Your Zenarate AI Coach provides a Simulation Scorecard certifying agents who have mastered your best methods and are ready to engage with live customers as top performers.

Zenarate AI Coach Amplifies Training Manager Success

Training managers quickly adapted to AI Coach as an effective force multiplier for their training efforts. Wheeler points out, **"Zenarate AI Coach has very robust assigning capabilities. We can assign simulation practices through the platform to any number of team members for any type of customer scenario."**

Sallie Mae's training managers can easily assign targeted training simulations for agent skill-building, hear agent improvement through Immersion Call Listening, and see agent topic & skill proficiency through their Simulation Scorecard.

The Education and Instructional Design team saw immediate improvements in their instructional efforts. Porter points out, **"One of the things we were able to measure very quickly was time savings. Our previous board certification process would take every new hire through a paper test that would take 2 hours. Then the manager would spend days grading the boards and providing feedback. Now, our trainees take their boards through Zenarate. What used to take us 2.5 days takes only 2 hours."**

Today, Sallie Mae is automating the agent certification process as well. **"If you thought 2 hours was fast, we are starting to certify agents in 30 minutes through AI Coach's automated simulation scorecards."** Additionally, they have been able to use AI Coach in the classroom setting to improve new hire engagement by, **"delivering education skill sets in small amounts of active learning so we can break-up skill-building to review as a class."** says Porter.

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With these significant time savings and improved employee engagement scores, Sallie Mae's training managers have been able to allocate more time to create better educational content and story simulations, further enhancing agent skill mastery and performance. Wheeler explained, **"Incorporating Zenarate into our new-hire classes is extremely beneficial to our processes, making it easier for us to send out education update videos with corresponding simulation training. The simulation training gets completed much faster than any other quiz or test we have ever used."**

Sallie Mae Expanded AI Coach Across the Enterprise in Customer Care and Sales

Sallie Mae's collections department was the first to pilot Zenarate AI Coach. With collectors having some of the toughest customer conversations, Sallie Mae wanted to train new hire collectors to have exceptional empathy skills and to meet rigorous compliance requirements. Sallie Mae focused on training agents to understand the customer's situation through soft skills such as active listening, acknowledging the customer with empathy, and asking probing questions to find the right plan for each customer. **"We want our customers to walk away knowing that Sallie Mae did everything in our power to get the best resolution, and Zenarate AI Coach is key to helping us with that goal,"** says Porter.

Sallie Mae expanded AI Coach from collections to its sales and customer care departments mastering the high-impact call types sales and customer care agents commonly face with live customers. For example, new hires are mastering how to take a borrower through the Sallie Mae loan process. **"Zenarate gives us the freedom to build out any story, making the technology beneficial for any customer-facing interaction,"** says Wheeler.

Sallie Mae is excited to continue expanding their AI Coach across their enterprise powering human connections, helping agents feel confident delivering consistent superior empathetic customer experiences.

Sallie Mae Added Experiential Learning to Meet Modern Workforce Demands

Sallie Mae's Education and Instructional Design team has observed that the younger workforce entering new-hire training expects the modern experiential learning approach that Zenarate AI Conversation Simulation provides. **"The younger workforce wants experiential learning and immediate answers, and that's what Zenarate AI Coach provides. If they don't remember something about a call type, soft skills, or compliance, they can go into the training simulation to practice,"** says Porter.

> "Zenarate gives us the freedom to build out any story, making the technology beneficial for any customer-facing interaction"

Matt Wheeler, Instructional Design Manager, Sallie Mae