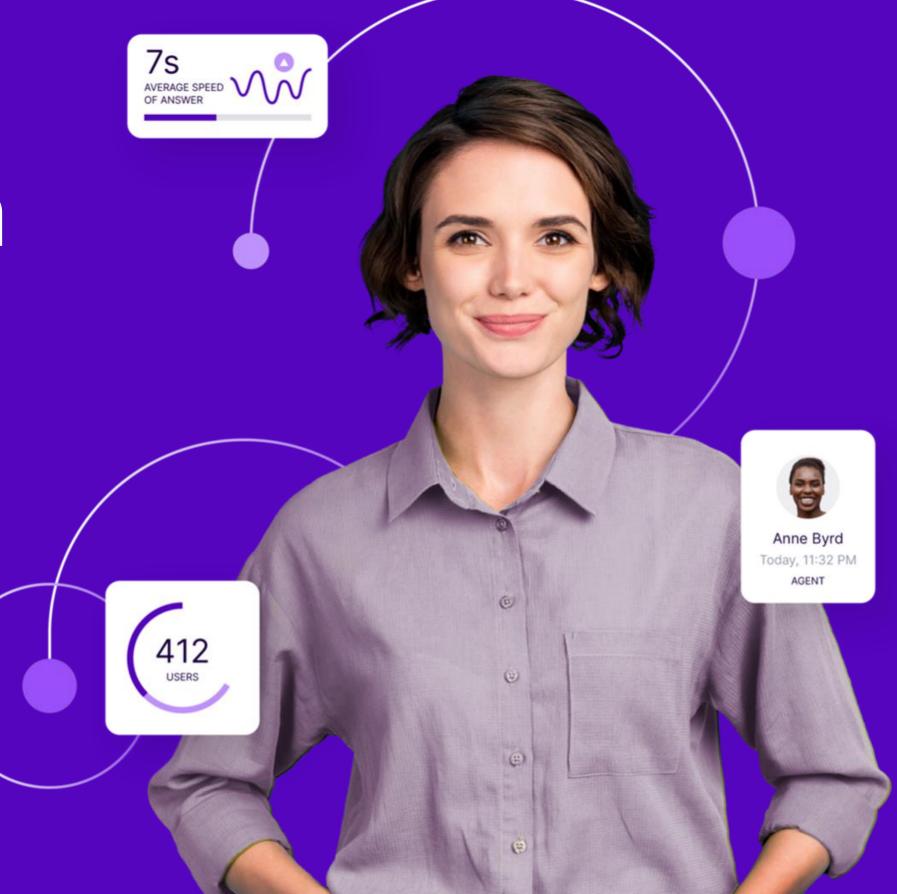




CX TransformationWhere to start?







01

Define your CX strategy

02

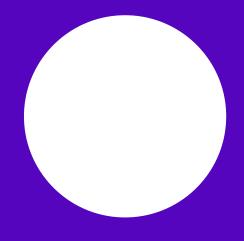
Project your return on investment

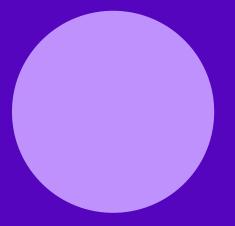


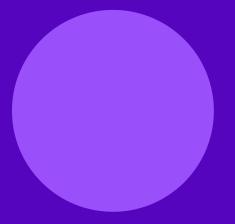
Realize value with Talkdesk

Defining your CX strategy

with the Talkdesk CX Strategy Value Framework™

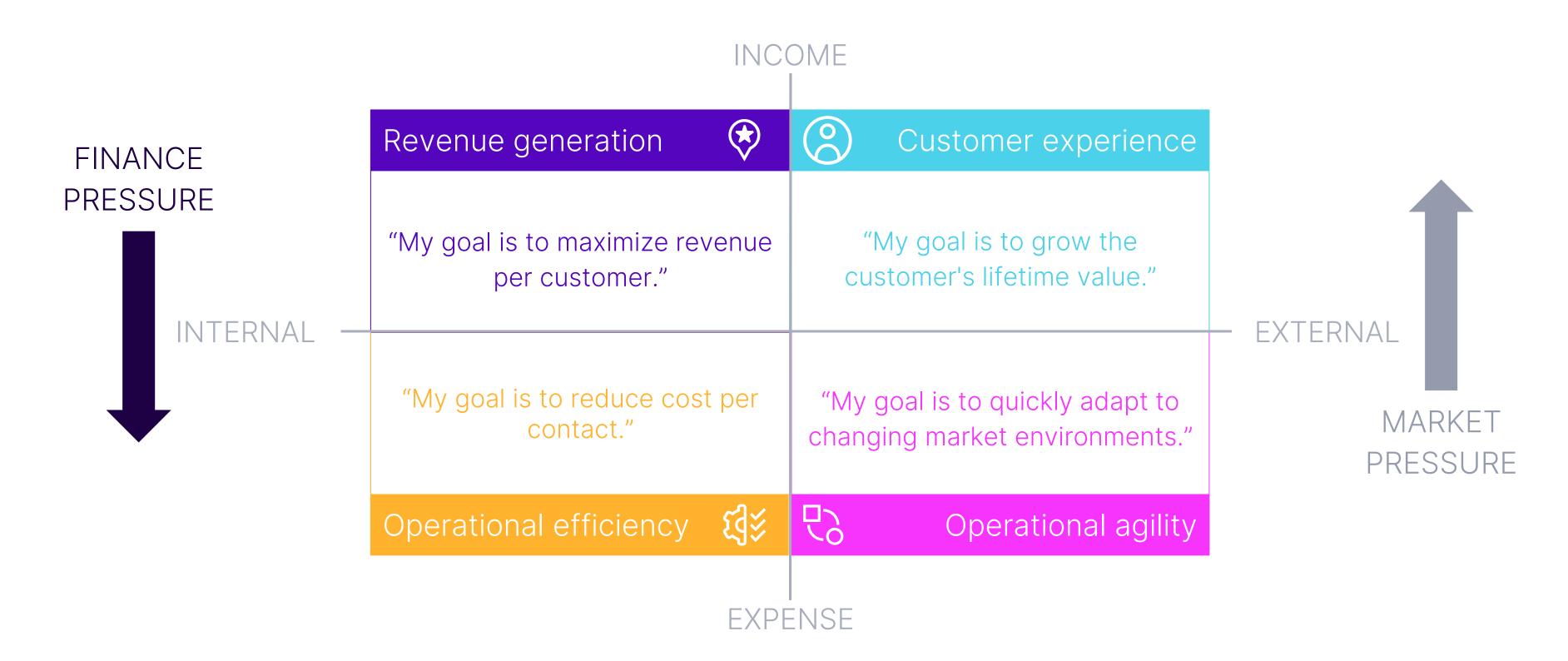




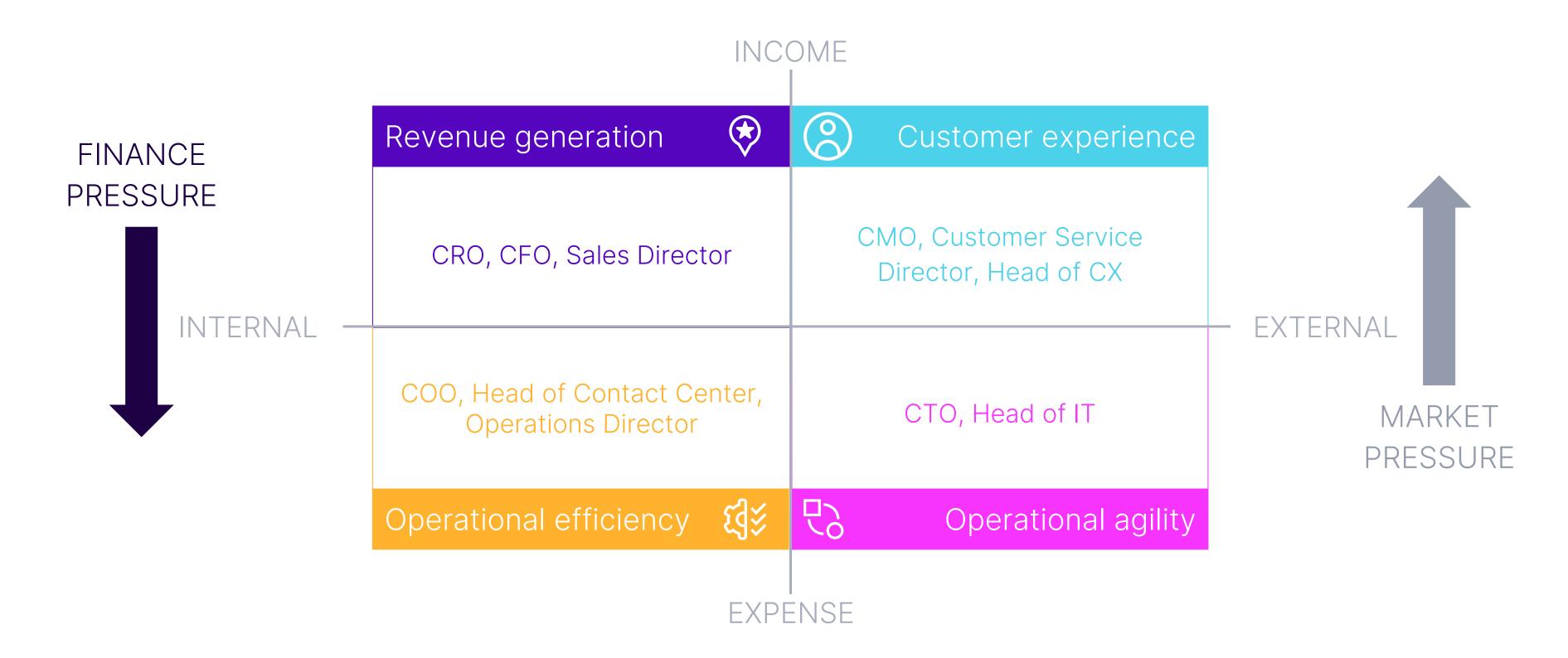




The value quadrants



The value quadrants from the perspective of leadership



Talkdesk value map

Value streams Initiative focus areas Outcome Digital Revenue Contact Revenue Increased * business generation center profits throughput revenue strategy Continuous improvement REVENUE Optimized First-contact Customer Digital Customer CSAT & experience transformation retention resolution resolution rate COST Optimization Operational Operational Optimized Agent CapEx/OpEx efficiency engagement expenses automation Simplify Enterprise Reduce error Operational Technology 6 wide rates & improve system reliability agility integration uptime administration

Customer experience

Digital transformation

- Seamless & integrated experiences
- Proactively engage customers
- Improved analytics

First-contact resolution

- Optimize routing decisions
- Improve agent knowledge
- Increase conversion rates

Customer retention

- Decrease detractors
- Increase brand promoters
- Improve customer loyalty

Talkdesk impact

19_{pts}

Improvement in NPS scores

5%
Increase in FCR

11%

Churn reduction

Revenue generation

Contact center profits

- Reduce abandonment rate
- Expand upsell opportunities
- Increase customer lifetime value

Revenue throughput

- Improve close rate
- Improve agent productivity
- Improve contacts per agent

Digital business strategy

- 360° customer view
- Multi-channel engagement
- Social monitoring/engagement

Talkdesk impact

30%

Reduction in abandoned calls

5%

Increase in average order size

Operational efficiency

Agent transformation

- Integrate to knowledge base
- Improve quality management
- Next best step prompting

Operational expenses

- Decrease IT headcount
- Reduce AHT
- Reduce interaction volume

Optimization and automation

- Service customers 24/7
- Management insights
- Virtual assistant and chatbots

Talkdesk impact

19%

Reduced authentication time

5%

Reduction in calls

15%

Reduction in after-call work

Operational agility

Technology reliability

- Self-healing architecture
- Scalability
- Uptime and availability

Simplify system administration

- Configured versus engineered
- Automated updates
- Real-time management

Enterprise-wide integration

- Operate via a single-screen
- Integrate with CRM
- Provide self-service opportunities

Talkdesk impact

50%

Improvement in scalability

30%

Improvement in time-tomarket

Business case impact alignment

Product Benefit Matrix with Impacts

- Very strongly correlated KPI benefit for this product/feature
 Strongly correlated KPI benefit for this product/feature
- Correlated KPI benefit for this product/feature

							CX CLOUD									ADD-ON PACKAGES																			
		Essentials					Elevate							Elite		W	WFM		Customer Experience Analytics		A	Agent Assist		oact itbou ager	ınd		ADE	10-0	I PRO	DDU	CTS				
BENEFITS	Voice Engagement	Studio	Connections	API Access	Live & Explore Reporting	Guardian Standard	Knowledge Management	Digital Engagement	Automated Notifications	Feedback Standard	Screen Recording	Conversations Mobile App	Quality Management	Virtual Agent	Self-Service Portal	100% Uptime SLA	Custom Reporting	Guardian	Performance Management	Forecasting & Scheduling	Talkdesk Schedule Mobile App	Talkdesk Interaction Analytics (Speech & Text)	Interaction Sentiment	CX Sensors QM Assist (AI & Automated QM)	Agent Assist Digital	Agent Assist Voice	Talkdesk Predictive Dialer	Talkdesk Preview & Power Dialer for Salesforce	Talkdesk Bulk SMS for Salesforce	Talkdesk API Connectors	PCI Payment	xConnect	Local Presence	Identity	Talkdesk Case Management Studio Text to Speech
											OPE	RAT	ION/	AL EF	FICIE	ENCY	BEN	EFIT:	s																
Average Handle Time Cost Reduction	•		•				•		•		•			•	•				•							1.				•				•	
Admin Overhead Cost Reduction	•	•	•		•	•	•				•		•		•	•	•		•	•	•	•								•		•		•	
IVR Containment Cost Reduction	•	•	•	•	•		•		•					•																•		•			
Callback Hiring Cost Avoidance	•	•	•	•	•				•																					•		•			•
Outbound Manual Work Cost Reduction	•	•	•	•	•		•	•						•	•										•		•	•	•	•	٠	•	•		
Increased Occupancy Cost Reduction	•	٠	•	•	•			•										•		•	•									•		•			
Team Lead FTE Savings	•	•	•	•	•		•		•						•				•	•	٠									•		•			
											RI	EVEN	NUE (GENE	RATI	ON E	ENE	ITS					·												
Outbound Connection Rate Revenue Increase	•	•					•	•						•			•								•	•	•			•			•		
Abandoned Call Revenue Recovery	•	•	•	•			•	•				٠		•	٠		٠			•	•				٠	•			•	٠					
Agent Productivity Revenue Increase	•	•	•	•			•	•		•			•	•	٠	•	٠		•	•	٠		•		•	•	•	•	•	•	•		٠	•	•
Call-to-Action Revenue Increase							•			•			•	•	٠				•				•						•	•	٠				
											0	PER/	ATIO	NAL	AGIL	ITY B	ENEF	ITS																	
Downtime Productivity Cost Reduction	•	•														•		•							Т							•		•	
Agent Time to Value Impact					_		•	•							•					•	•						•	•		٠	•		•		
Digital Channel Optimization Savings				•			•	•		٠					٠					•	•									٠					
											CL	JSTO	MER	EXP	ERIE	NCE	BENE	FITS																	
Transfer Reduction Savings	•	•	•	•	•		•	•	•			٠			•		•			•	•					•	•			•		٠			
First Contact Resolution Impact	•	•	•	•	•		•	٠	•	٠			•	•	•	•		•	•		٠	•	•	•	•	•			•	٠	٠	•			•
Proactive Notification Call Avoidance Savings				•	•		•	•	•						•		•					•		•			•		•	•			•		

Business case impact alignment

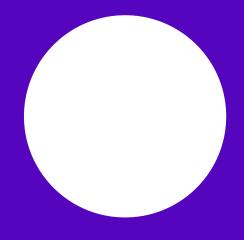
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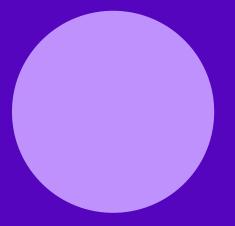
Product Benefit Matrix with Impacts

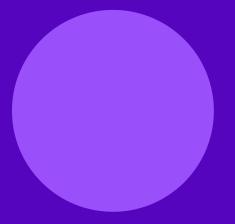
						1921	СХ	CLC	DUD												ADD	-ON	PA	CKA	GES												
		Essentials								Ele	vate					Elite			WFM		Customer Experience Analytics			е	Ag As	ent sist	Proactive Outbound Engagement		nd	ADD-ON PRODUCTS							
BENEFITS	Voice Engagement	Studio	Connections	API Access	Live & Explore Reporting	Guardian Standard	Knowledge Management	Digital Engagement	Automated Notifications	Feedback Standard	Screen Recording	Conversations Mobile App	Quality Management	Virtual Agent	Self-Service Portal	100% Uptime SLA	Custom Reporting	Guardian	Performance Management	Forecasting & Scheduling	Talkdesk Schedule Mobile App	Talkdesk Interaction Analytics (Speech & Text)	Interaction Sentiment	QM Assist (Al & Automated QM)	CX Sensors	Agent Assist Digital	Agent Assist Voice	Talkdesk Predictive Dialer	Talkdesk Preview & Power Dialer for Salesforce	Talkdesk Bulk SMS for Salesforce	Talkdesk API Connectors	PCI Payment	xConnect	Local Presence	Identity	Studio Text to Speech	Talkdesk Case Management
	OPERATIONAL EFFICIENCY BENEFITS																																				
Average Handle Time Cost Reduction				1.0	•				•		•			•	•				100						•		•										

Projecting return on investment

with a complimentary business case analysis









ROI data capture worksheet

Requested information is tailored to the specific initiatives that could impact the agreed priority business objectives.

Talkdesk Business Case Data Request

Please complete as much of the yellow-shaded inputs as possible. Approximations are fine if precise data is not easily obtainable. For elements that are not applicable, use "N/A".

Business Unit Name:

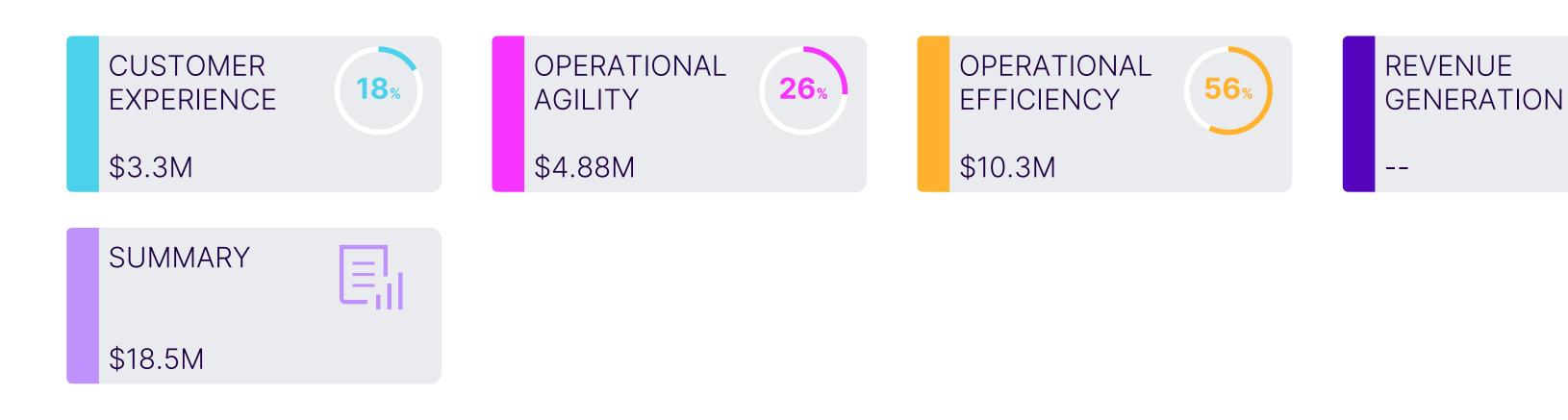
Number of Customer Support Agents:
Number of Dedicated Sales Agents:
Number of Dedicated Omnichannel Agents:

TOTAL CONTACT CENTER AGENTS:

Maximum Number of Concurrent Agents:
Contact Center Hours of Operation:
Total Company Revenue:

A4	Total Company Revenue:				
			Benchmark Aver Data Input	ages used if Data Inp	out field left blank Benchmark Averages
A5	Annual Total Volume of Inbour	nd Calls (handled + abandoned):			Denominark Averages
	Reasons for Inbound Calls:	,	call type	volume or %	
		Top 5 call reasons - 1st	e.g. tech support		
		Top 5 call reasons - 2nd	e.g. order status		
		Top 5 call reasons - 3rd	e.g. place order		
		Top 5 call reasons - 4th	e.g. cancel service		
		Top 5 call reasons - 5th	e.g. product inquiry		
	% of Inbound Calls that Lead t		<u> </u>		15%
Α6	Annual Volume of Outbound C	alls Connected:			
	Reasons for Outbound Calls:		call type	volume or %	
		Top 5 call reasons - 1st	e.g. collections		
		Top 5 call reasons - 2nd	e.g. inquiry follow-up		
		Top 5 call reasons - 3rd	e.g. appt. reminder		
		Top 5 call reasons - 4th	e.g. marketing/sales		
		Top 5 call reasons - 5th	e.g. schedule appt.		
	% of Outbound Calls that Lead	to Revenue:			25%
	Annual Fully Burdened Salary	per Agent:			\$40,000
	Annual Fully Burdened Salary	per Team Lead:			\$50,000
	Total Annual Telephony Minute	es:			
	Average Handle Time per Call	(secs) (sum of rows 38-41):	330		330
	Average Agent Time to Au				30
	Average Post-Authenticat	ion Talk Time			230
	Average In Call Hold Time				10
	Average After Call Work T				60
	Average Manual Work per Out	bound Call (secs):			90
	Agent Occupancy (%):				75%
	Agent Shrinkage (%):				25%
	Average Speed to Answer (see				45
	Average Abandon Rate for No				10%
	Average Abandon Rate for Sal				10%
	Service Level Attainment (% a Transfer Rate (%):	nswered within target):			75% 8%
	Uptime for Prior 12 months (%	١٠			99.900%
	Current Yearly Attrition Rate:)·			30%
	Agent per Team Lead Ratio (#	agents per supervisor):			15
	IT FTE:	agents per supervisor).			0
	Reporting FTE:				0
	QM FTE:				0
	WFM FTE:				0
	Current Outbound Connect Ra	ite:			15%
	Current Lead Conversion Rate	:			13%
	Current Opportunity Close Rat	te:			15%
	Average Revenue per Opportu	nity Closed:			\$100
	Annual Volume of Chats/SMS:				
	Average Chat/SMS Handle Tin	ne (secs):			495
	Annual Volume of Email:				
	Average Agent Effort Time to				660
	Annual Volume of Fulfilled Cha				0
	% of Visitors that Respond to				4%
	% of Visitors that Leave Witho	ut Fulfilling Transaction:			70%

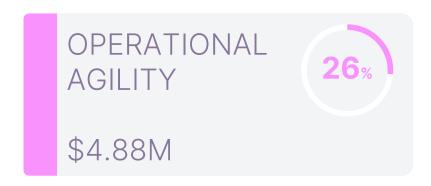
ROI highlight benefits



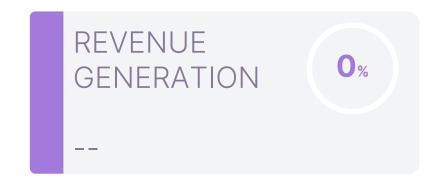
0%

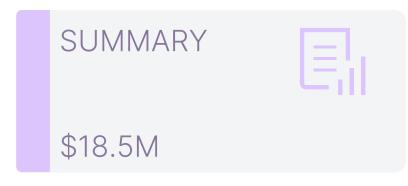
ROI highlight benefits











AVERAGE AFTER CALL WORK TIME REDUCTION	\$535K	
AVERAGE AUTHENTICATION TALK TIME REDUCTION	\$683K	
AVERAGE IN-CALL HOLD TIME REDUCTION	\$1.05M	
AVERAGE POST-AUTH TALK TIME REDUCTION	\$1.52M	
INCREASED OCCUPANCY COST REDUCTION	\$1.61M	
IVR CONTAINMENT COST REDUCTION	\$2.66M	

Detailed review of initiatives

IV	R CONTAINMENT COST REDUCTION			\$2.66M
Α	Annual inbound calls	11,351,224 calls		
В	Additional % contained with self-service	5%		
С	Annual impacted call volume	567,561 calls		
D	Current time spent (AHT)	409 seconds		
Е	Cost per second	\$0.004		
F	Annual hours worked per agent	2,080 hours		
G	% of time impacted	100%		
		Year 1	Year 2	Year 3
Н	Annual benefit realization	80%	100%	100%
	Agent full-time equivalent	24.80 FTEs	31.00 FTEs	31.00 FTEs
	Annual benefit	\$759,000	\$949,000	\$949,000

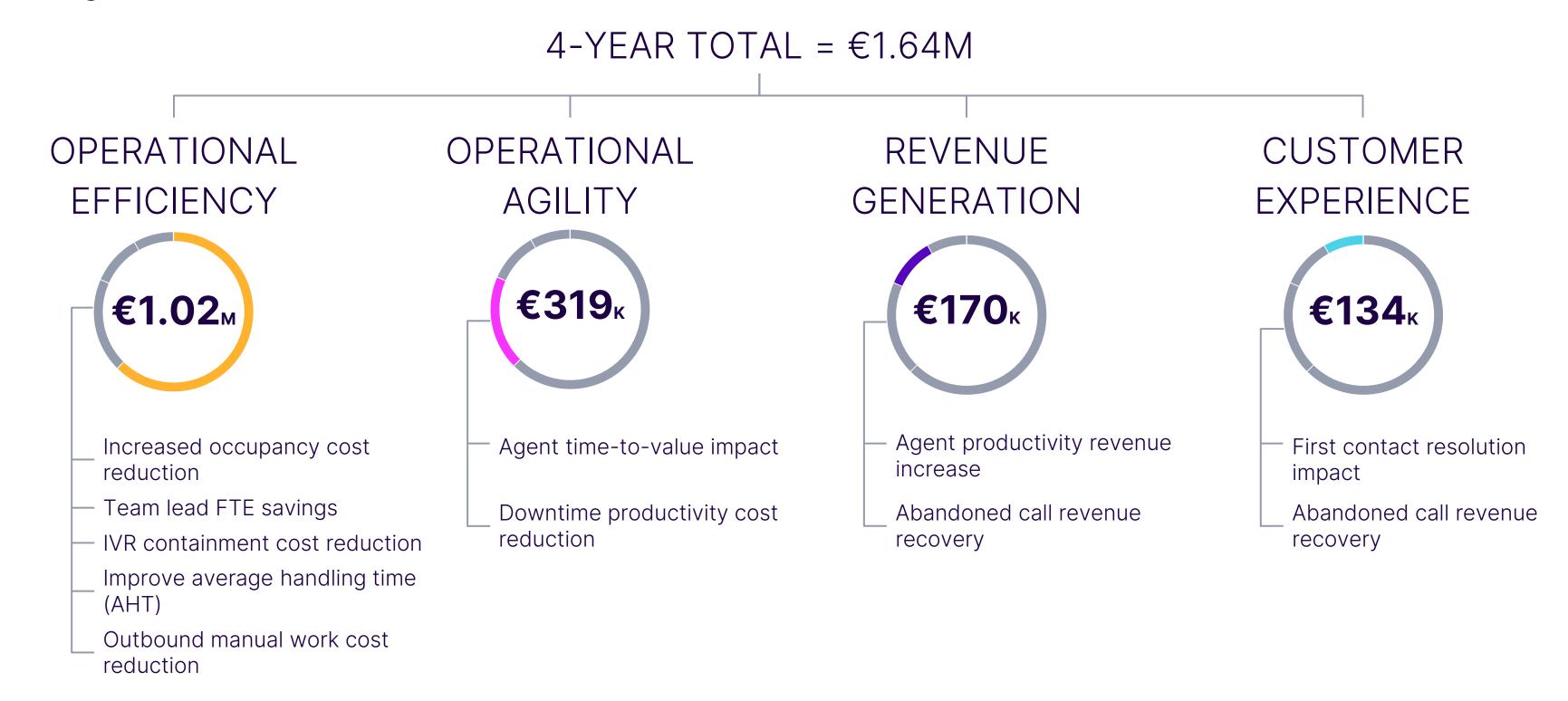
2,000 agents



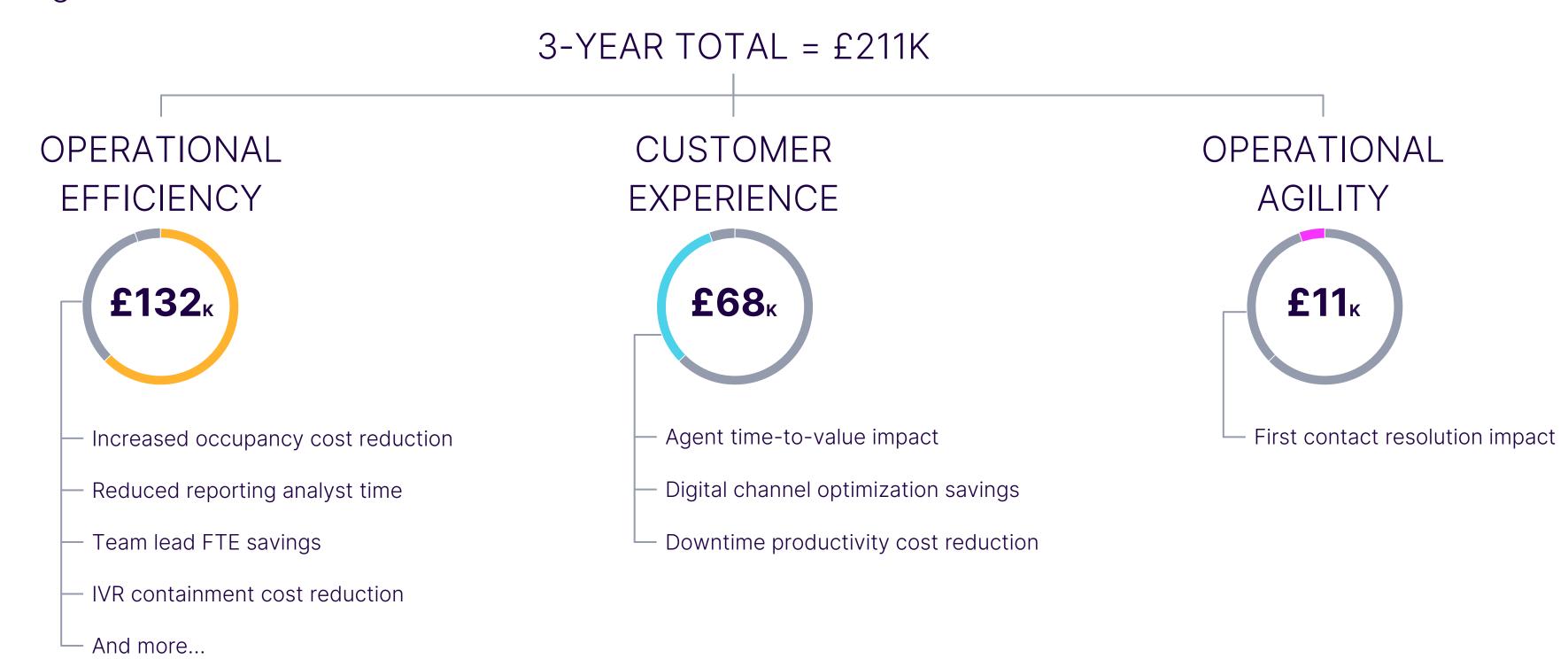
400 agents



200 agents

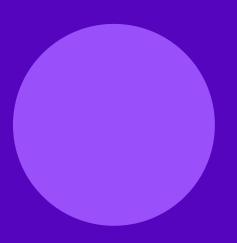


30 agents



Realizing value with the Talkdesk CX Strategy Maturity Assessment

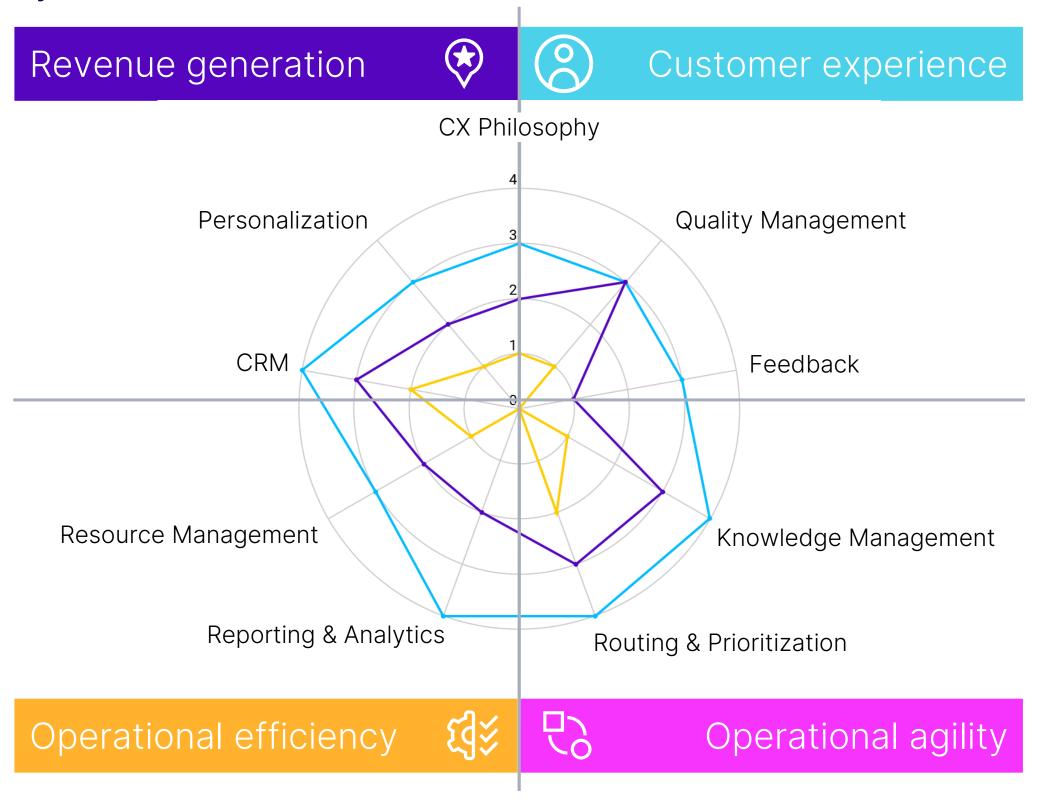






Realize value with Talkdesk

CX strategy maturity assessment.



Previous state

Current state

Desired state

Talkdesk CX Strategy partnership

Sequence and alignment plan.

Analyze Prescribe Connect Discover Execute Present offer Share CX Strategy Create CX Strategy Present Gather data inputs & Value Framework recommendations business case & next steps Align vision and Develop business Interview Share initial business. Transition to

- priorities. Define strategic KPIs.
- Discuss timelines.

- stakeholders.
- Capture business processes.
- Identify pain points.
- Align on key Talkdesk features, functions & capabilities.

- case.
- Develop roadmap (short-term, mid-term and long-term).
- case identifying most impactful products and features.
- Re-align priorities.
- Iterate and agree upon final business case.

- **Professional Services** & Customer Success.
- Track KPIs and benchmarks at deployment.
- Ensure solutions deliver on anticipated value; revisit strategy if needed.

Realize the full value of your contact centre investments

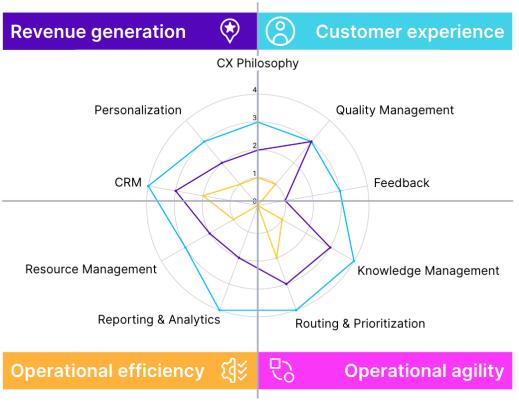


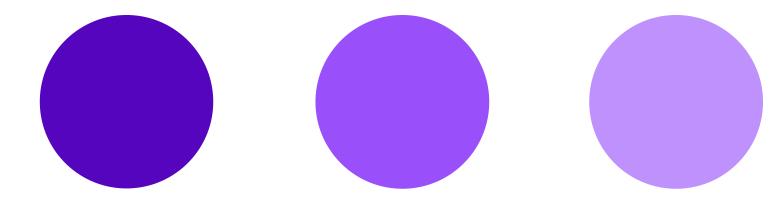
Outbound manual work cost

reduction









Q&A



Thank you

