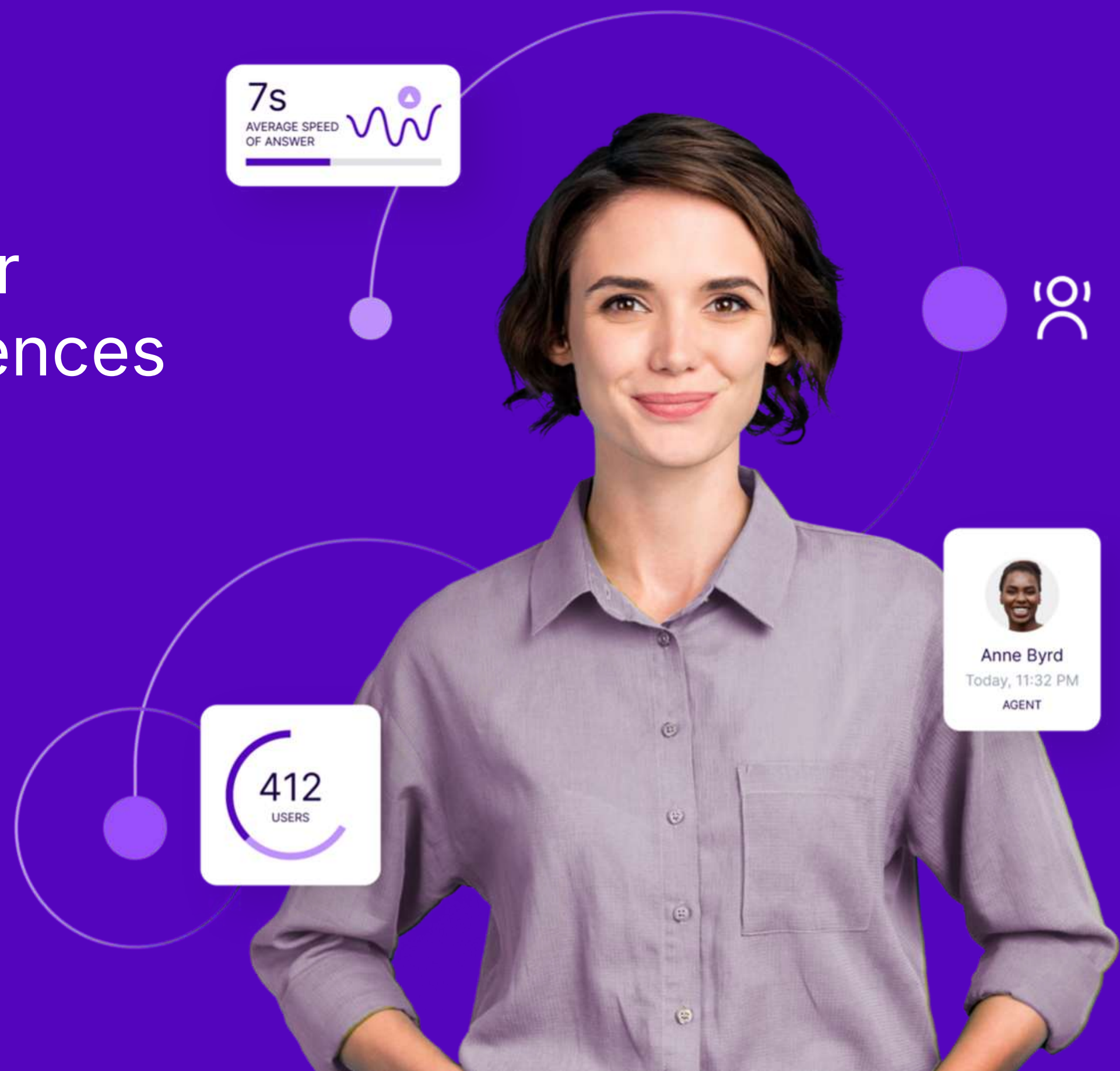# :talkdesk®

Empowering Agents to Deliver Exceptional Customer Experiences

A CALL CENTRE HELPER WEBINAR

February 27, 2025

**Toussaint Celestin – Principal, AI Product Marketing**

7s
AVERAGE SPEED
OF ANSWER

Anne Byrd
Today, 11:32 PM
AGENT

412
USERS

Introduction – Agent Challenges

Information is the currency of customer service

Client

1st touch

Convenient 24/7 access

Biometric authentication

Call deflection & containment

Agent FTE optimization

AGENTS MANAGE INFORMATION HIGHWAY TRAFFIC

2nd touch

No repetitive ID or explaining

Automated warm transfer with pre-populated customer data

Reduced call abandonment & customer retention

3rd touch

Fast service w/ pleasant agent

Focused low-stress interaction

Expedited call handling & resolution

Post-interaction

Proactive post-call notifications

Efficient workflow, lower churn, improved emotional rapport

Consistent, accurate documentation.

Self-Service

Live Agent Assist

Workflows & Analysis

Built on a proven deployment and success framework supporting 3,000+ global customers.
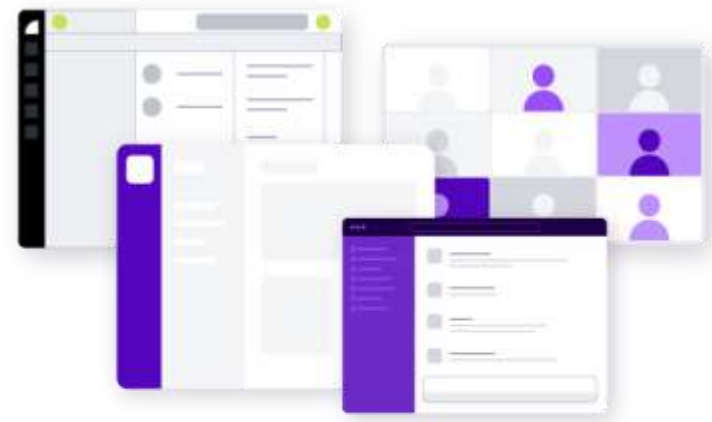
:talkdesk

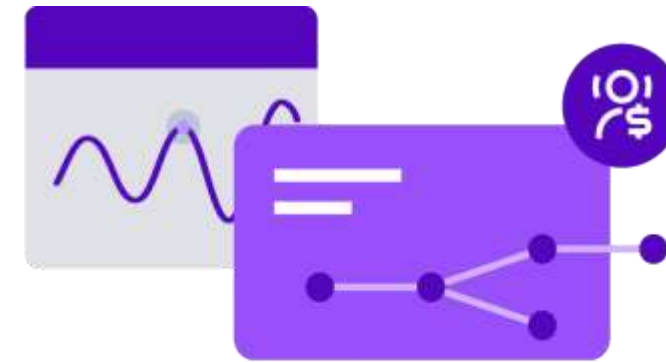# Agents struggle playing information traffic cop

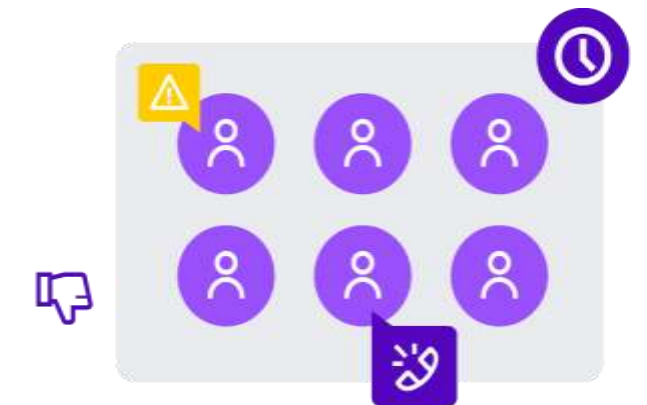Biggest challenges for customer-facing associates in resolving issues
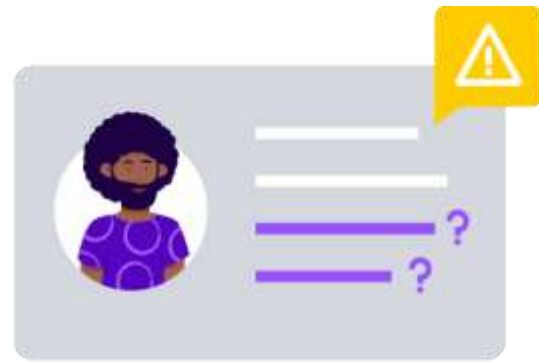
89% They have incomplete information about customers.

77% They have to navigate too many systems, screens, or applications.
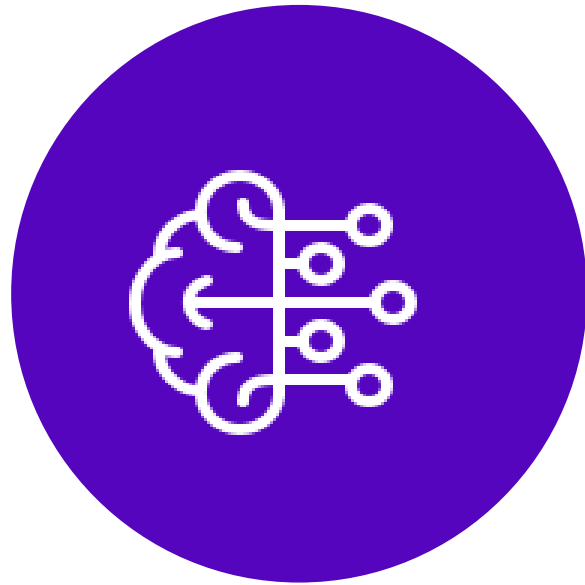
76% They have to navigate too many processes.

41% They have limited bandwidth due to high volume of inquiries.

Agent struggles lead to information traffic jams.

Limited real-time access to information

Agents don't have instant access to knowledge, to solve customers' issues correctly and quickly.

Scattered systems

Agents need to look for information in multiple systems and applications, wasting time switching between windows.

Manual and repetitive tasks

Agents spend too much time in no-value added tasks and after-call work.

Dependency on supervisors

When agents don't know how to solve a customer's issue, they have to put customers on hold and call the supervisor for support, leading to escalations.

The AI Agent Empowerment Opportunity

71% of contact center employees say AI helps them **do their work more accurately.**

73% of contact center employees say AI helps them **do their work faster.**

Source: Talkdesk CX Professional Digital Priorities Survey, Talkdesk Research, October 2020

79% of CX professionals believe **AI will serve as an "assistant"** by providing more **support to human agents**, versus replacing them.

Source: The future of AI in the contact center, Talkdesk Research, May 2021

Agent Assistance has the potential to **reduce Average Handle Time by 30%.**

:talkdesk®

Solutions Framework

The role of AI in the contact center.

Automate Workflows

Resolve more interactions through self-service.

Empower Agents

Help agents serve customers quickly and accurately.

Discover Insights

Extract valuable insights from every interaction.

Use AI to streamline agent workflows & productivity

Improve agent proficiency and accuracy

Provide real-time call transcriptions and dynamically **suggest articles and answers** from the knowledge base to boost **first contact resolution**.

Eliminate window switching

Connect to your knowledge base to give agents **contextual recommendations**, direct answers and real-time shortcuts directly inside the agent interface.

Simplify agent effort on admin tasks

Automate repetitive tasks to help agents resolve issues faster. Intelligently deliver real-time next best actions and use integrated automations to **ease** back-office tasks and **after-call work**.

Reduce the need for supervisor assistance

Enable agents to be more **self-sufficient in solving customer issues**, giving supervisors more time to focus on priority tasks and reducing the number of escalations to supervisors.

:talkdesk
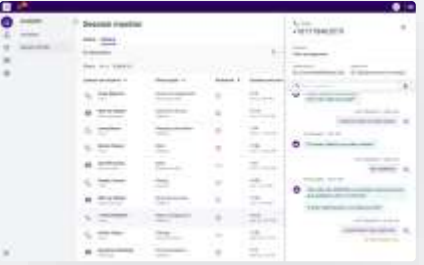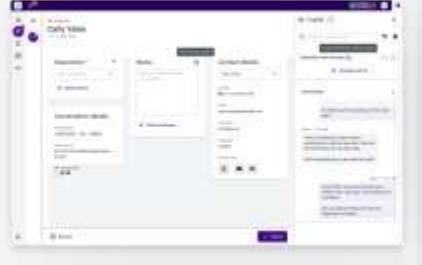
Helping agents resolve issues correctly and quickly

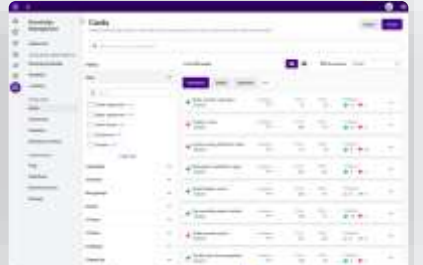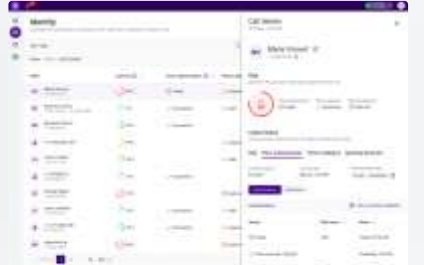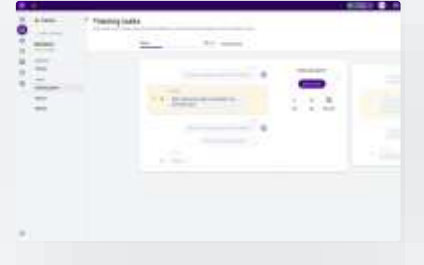✓ Improved first call resolution (FCR)

✓ Faster handling times (AHT)

✓ Reduce customer effort

✓ Decreased agent attrition

✓ Improved ramp-up time

Talkdesk's Ascend AI Platform

AI Components

Talkdesk Ascend AI Platform Core Capabilities

Autopilot	Navigator	Copilot	Knowledge Management	Interaction Analytics	Quality Management	Shield	AI Trainer
Incorporate AI **self-service** across the customer journey. Generate contextual responses using **generative AI**	Ensure the ideal customer journey for every customer every time. **LLMs and generative AI let customers talk naturally** for a hyper-personalized experience.	**Empower agents with real-time guidance**. Deliver real-time automated assistance, recommendations, and next best actions.	Deliver **contextual answers** to agents using AI-powered semantic search techniques. Solve customer issues quickly and accurately.	Turn every interaction into customer intelligence. Discover intent and **sentiment** patterns.	Improve **agent performance** and elevate customer experience. Automatically score and evaluate agent-customer interactions.	Seamless **authentication and fraud detection**. Empower customers to quickly connect with agents using self-service, real-time authentication and biometrics.	Improve accuracy and trust. Predict, monitor, and control AI outcomes. Train and fine-tune AI models for ultimate control and visibility.

:talkdesk

Copilot

AI that actually helps agents resolve issues correctly and quickly.

Improve agent proficiency and accuracy.

AI provides real-time call transcriptions so agents can easily gives **in-context answers** and recommended **actions based on customer intent**, helping agents solve questions at first contact and **boosting agent confidence** and resolving issues faster.

Simplify agent effort on administrative tasks.

Copilot uses generative AI to **automatically create interaction summaries** and next-steps in seconds, reducing after-call work to seconds.

Reduce the need for supervisor assistance.

Enable agents to be more confident and self-sufficient in solving customer issues, while reducing queries to supervisors and unnecessary escalations.

Integrate your knowledge base.

Generative AI taps into trusted information from your knowledge base to **suggest precise, conversational responses** during live interactions. suited to the interaction's context, tone, audience, and channel.

Proactive answer assistance

Copilot helps agents resolve issues quickly and correctly

Pain points

Difficulty finding the right information in real-time while interacting with customers.
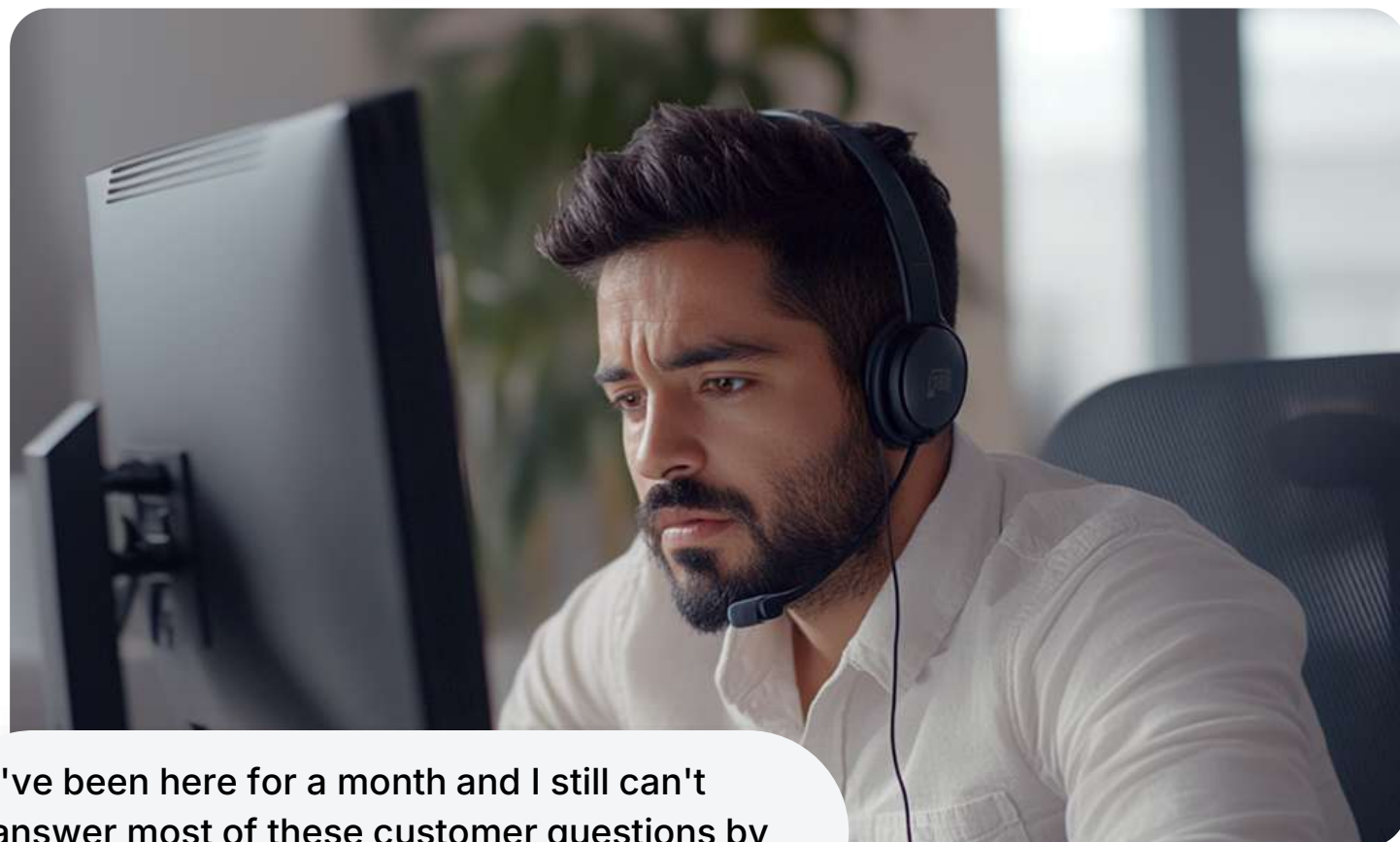
I've been here for a month and I still can't answer most of these customer questions by myself...

BEFORE

Benefits

Copilot detects, learns, retrieves, and provides the best knowledge base articles to help resolve complex customer issues faster, and reduce the dependency to call for supervisor help.
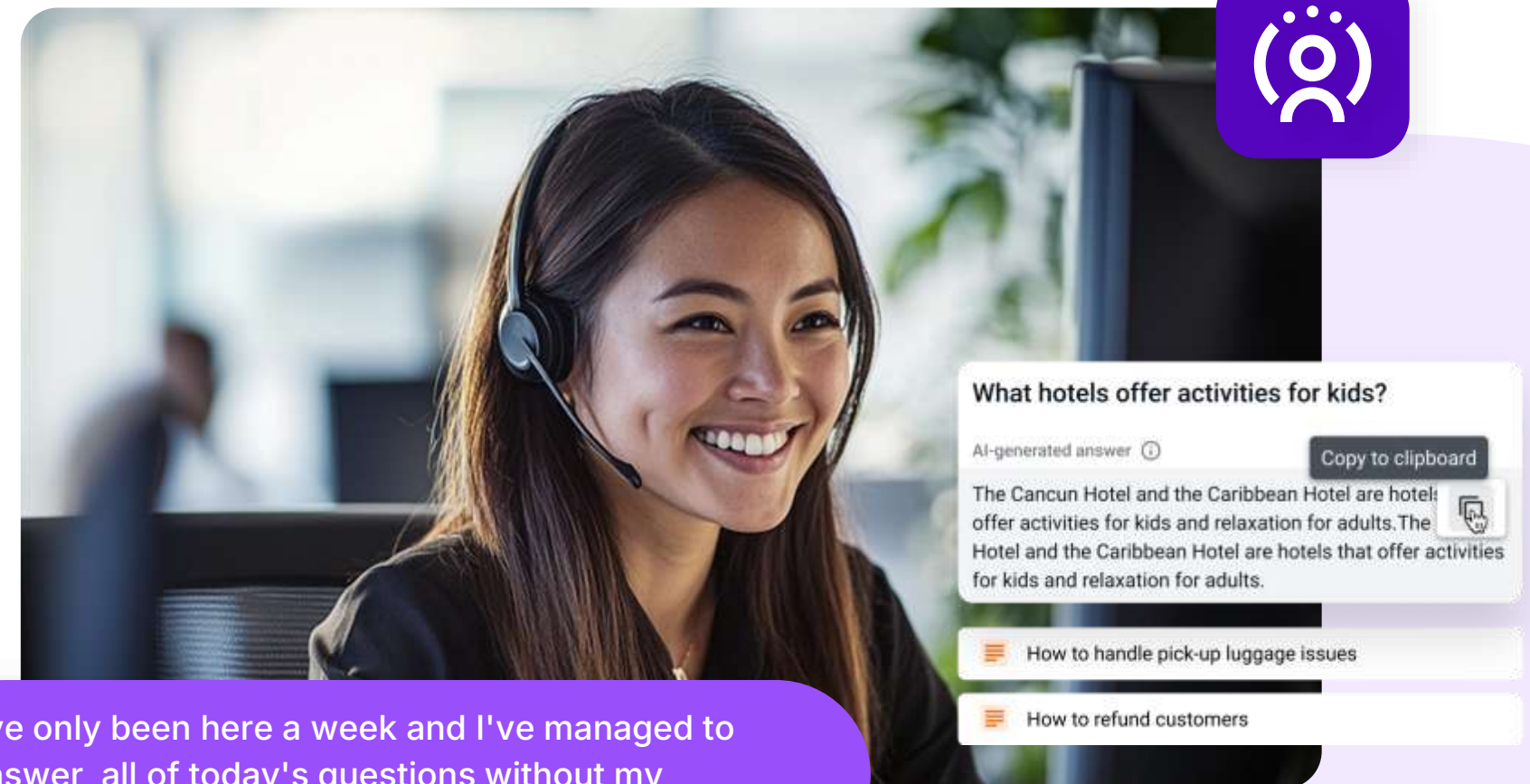
I've only been here a week and I've managed to answer all of today's questions without my supervisor's help!

AFTER

:talkdesk·

Automated post-call workflows

Copilot helps agents document call summaries & focus on customers

Pain points

Time-consuming post-call summaries take away from valuable agent-customer face time.

Benefits

Copilot automated call summarization expedites note taking freeing agents to handle more calls and focus more.
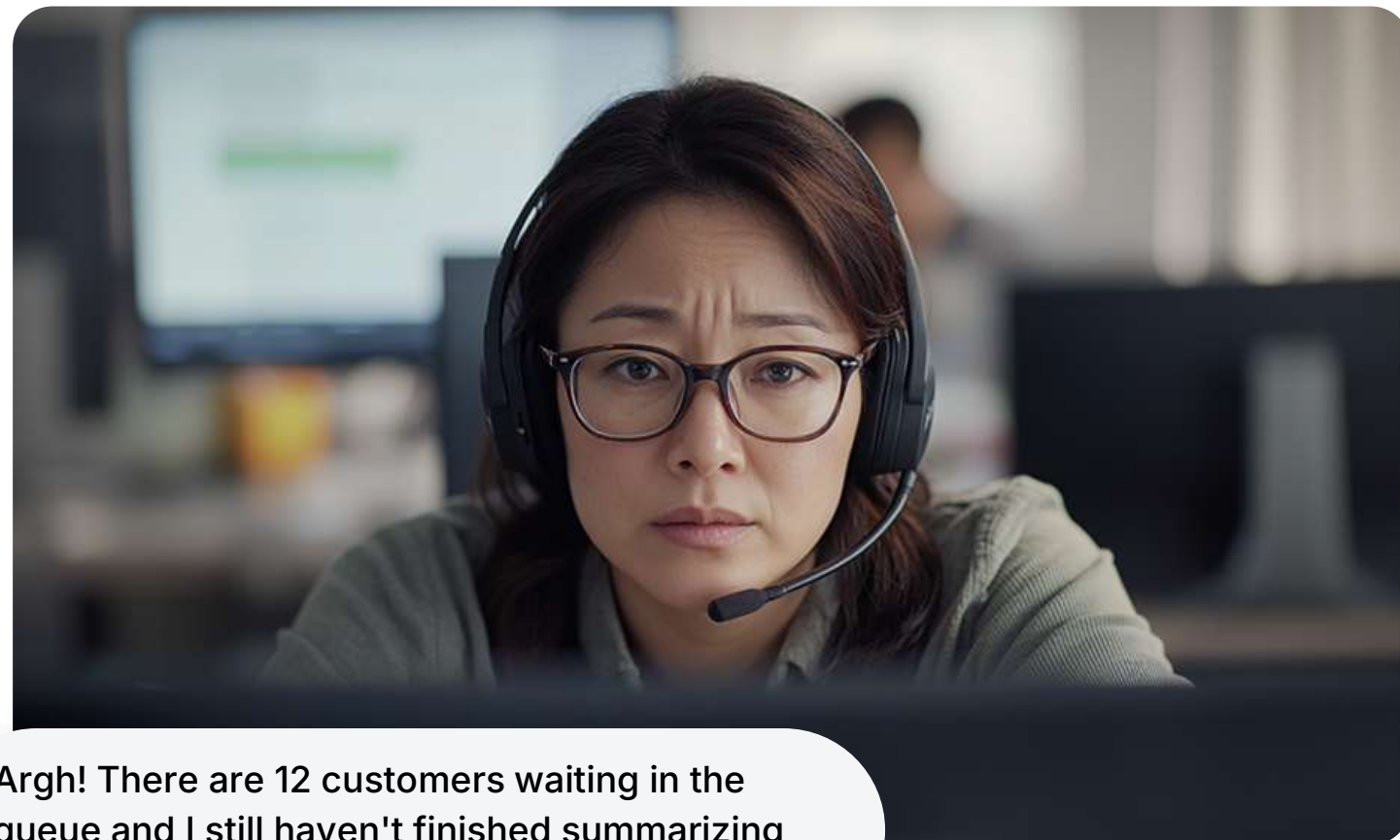
Argh! There are 12 customers waiting in the queue and I still haven't finished summarizing the last call!

BEFORE

GenAI automatically records a summary and disposition of each interaction.

Disposition and Summary ⓘ

✦ Generate with AI
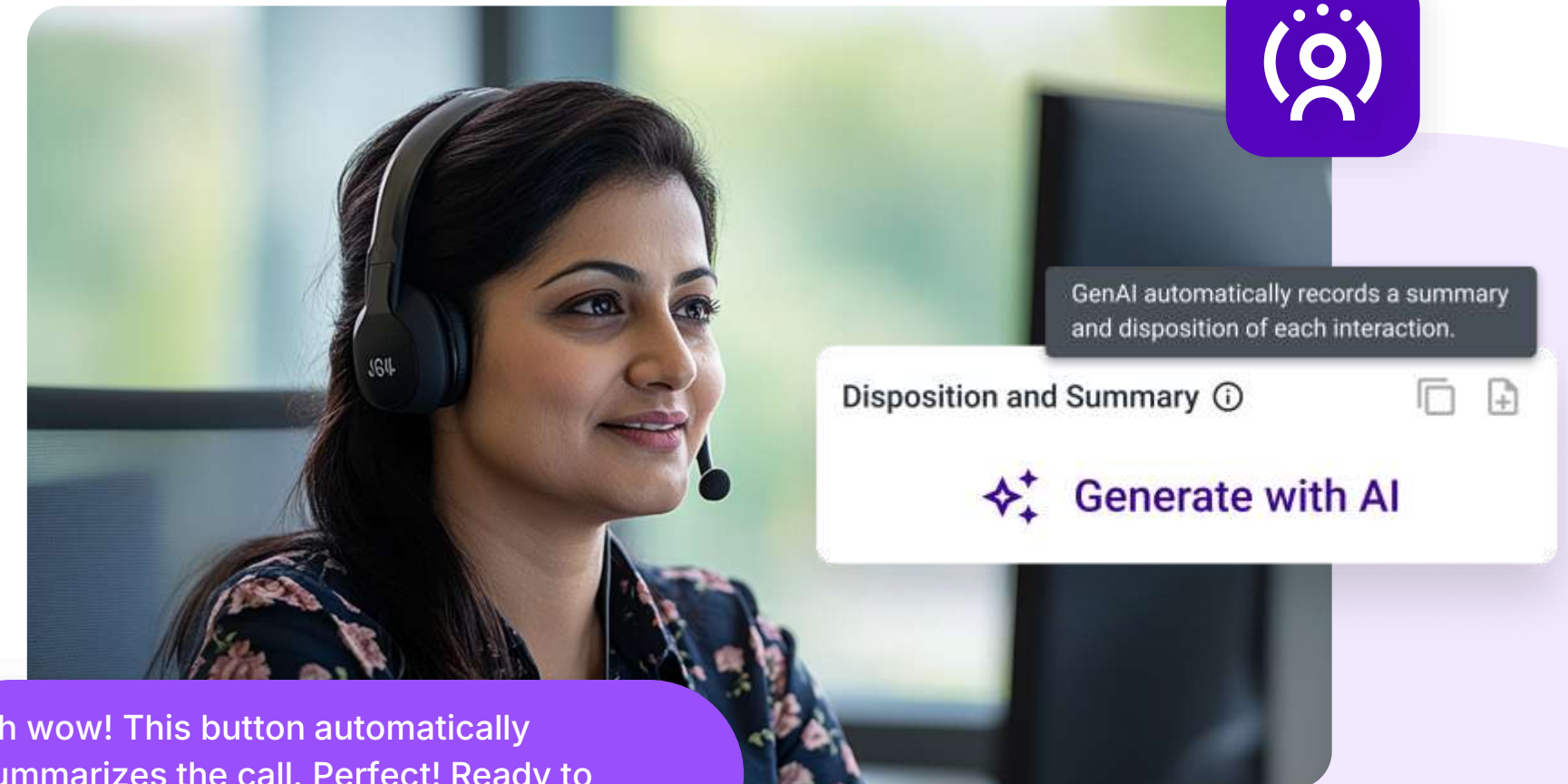
Oh wow! This button automatically summarizes the call. Perfect! Ready to answer the next call!

AFTER

:talkdesk·

Knowledge Management for fast access to scattered information from one location

Confluence

Websites

Talkdesk Knowledge Management

Google Drive

zendesk

OneDrive

salesforce

servicenow

SharePoint
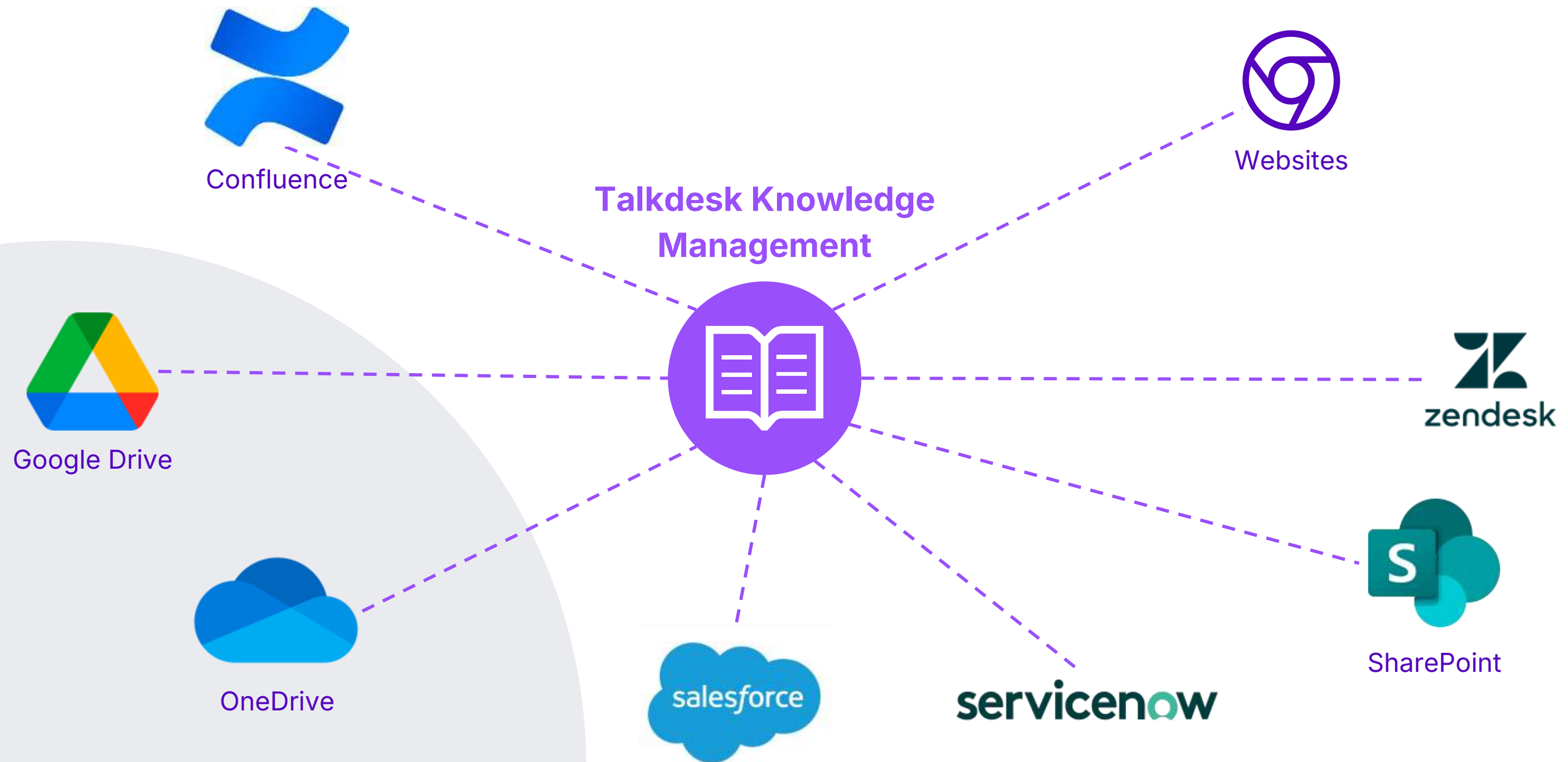
Article search

Copilot reduces frustrating searches & eliminates switching systems

Pain points

Agents spend considerable time switching UIs to find answers to uncommon questions.

I hate having to look at countless systems just to find the right answer for one customer!

BEFORE

Benefits

Copilot seamlessly operates across multiple connected knowledge bases, ensuring a comprehensive and efficient support system for customers.

Search your knowledge base

Resolve customer issues quickly

Copilot interprets your conversations with customers in real time and automatically looks for the best answer to each question.
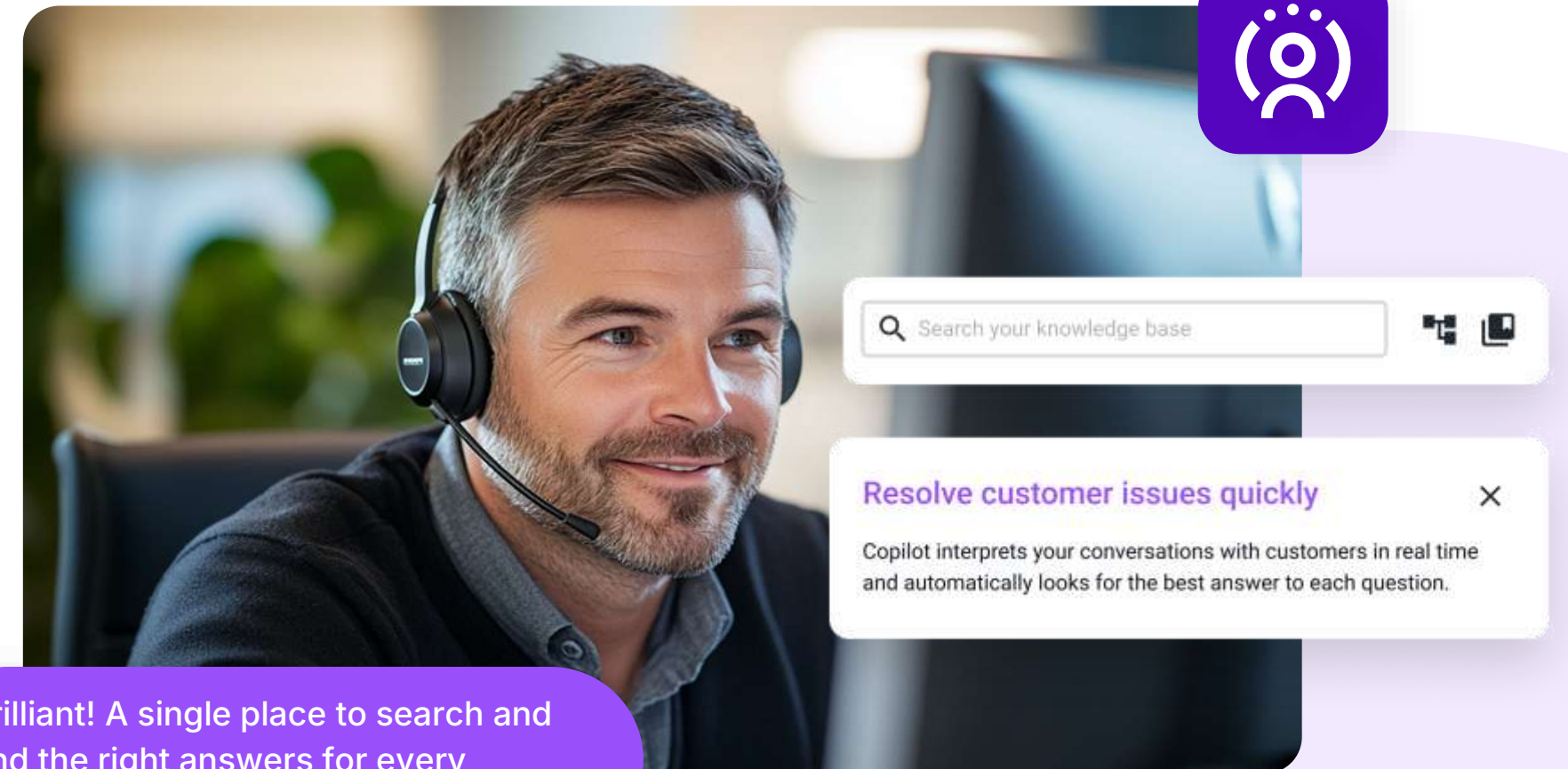
Brilliant! A single place to search and find the right answers for every customer.

AFTER

Measuring success

5 Core Customer Success Metrics

- **Average handle time (AHT): Support agents with suggested content** and automated actions, decreasing the average duration of one transaction, including **hold time**, **talk time** and after-call work.

- **CSAT score:** Agents are able to resolve cases faster and more efficiently, **increasing customer satisfaction** with the service provided.

- **First contact resolution (FCR):** Agents can answer to the caller's question or **solve the problem during the initial call** and no follow-up contacts are necessary.

- **Employee engagement/e-NPS: Agents feel more empowered** and engaged with their work.

- **Agent ramp up time:** Real-time knowledge and automation support to agents **decreases the amount of time it takes to train agents** and for them to get fully up and running.

Use Case & Success Stories

A better banking omnichannel customer service journey

CLIENT

Client interacts via text with website AI agent regarding **Home Equity Line of Credit**

Interacts with an AI-powered Autopilot

Copilot automates efficient information flow to the agent in a single workspace.

Agent picks up without customer repeating previous info.

Agent uses automated **workflows** to generate payoff quotation and help with other account queries.

Checks balance payoff amount but needs more details and is **routed via Navigator to the best available agent**

Copilot conversational AI analysis & captures topic, intent & context and retrieves knowledge articles for fast accurate answers.

Post-call workflows are automated with AI-powered call summarization & recommended next steps

Positive CSAT survey received

Updates Autopilot & Copilot with insights uncovered in **CX Sensors**

Sentiment analysis and other KPIs auto-generated automated using **Interaction Analytics**

Differentiated Service & **Empowered** Team

CUSTOMER | AUTOPILOT VIRTUAL AGENT | COPILOT AGENT-ASSIST

SUPERVISOR, ADMIN

:talkdesk

WaFd Bank

Love what you do.

Founded in 1917 and headquartered **in Seattle, Washington**, WaFd operates more than 200 branches with $20 billion in assets. The financial institution is on course to become a fully digital-first bank by 2025.

www.wafdbank.com

Talkdesk Financial Services Cloud™
Amazon Lex
StataCore
Talkdesk Autopilot™

Customer Story: **Service**

WaFd Bank drives performance improvements, staff efficiencies

WaFd wanted to improve its contact center to meet clients where they were at digitally, through phone or online chat. Their legacy solution was inflexible, creating needless friction for clients and agents alike.

With **Talkdesk Financial Services Experience Cloud, Talkdesk Identity, StrataCore, Amazon Lex, and Talkdesk Autopilot,** WaFd has been able to transform a century-old financial institution into a modern digital-first competitor with Talkdesk Financial Services Experience Cloud™ integrated with Amazon conversational AI.

Now, WaFd has decreased check balance times from 4.5 minutes to 28 seconds, an improvement of almost 90%.

Frictionless features and faster service for happier customers

Experience. A better way.

95%
reduced check balance rate.

$1.4M
Savings in 3 years with expected 165% ROI

apple
FEDERAL CREDIT UNION

We will improve lives and fulfill dreams.

Founded in 1956, each member who chooses to join the Apple family is offered the attention
and service that they deserve--
from basic to complex financial situations. Their mission is to offer unique financial solutions, service, and advice which will exceed members' needs helping to improve lives and fulfill dreams.

www.applefcu.org

Talkdesk Financial Services Cloud™
Talkdesk Autopilot™
Talkdesk Navigator
Talkdesk Copilot
Talkdesk Digital Engagement
Talkdesk Workforce Management™

:talkdesk®

TALKDESK FOR FINANCIAL SERVICES & INSURANCE

Customer Story: **Service & Support**

Apple Federal Credit Union revamped their legacy phone system while their team was transitioning to working from home during the height of the pandemic. With **Talkdesk Navigator and Talkdesk Autopilot,** monthly ASA decreased from **8.28 minutes to 5.17 minutes,** call abandonment rate reduced from **26.1% to 14.1%**, and average hold time reduced from **146 to 103 seconds**. Overall satisfaction rate **increased from 8.5 to 9.25.**

The biggest initiative for 2023 is expanding Apple's omnichannel capabilities. They can now use our new data analysis tool (Operative Intelligence) to figure out why people are calling, build better self-service opportunities, and offer a continual dialogue about how to make it happen. Apple's goals in this is to empower their workforce to turn calls into chats and chats into SMS, which means they can communicate with our members however they want to communicate with us.

Improving member experience by replacing a legacy system with an all-in-one contact center platform.
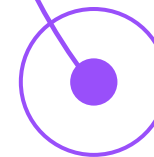
Experience. A better way.

62%
reduced ASA (average speed of answer)

8.5-9.25
increase in OSAT

23

peddle

Fast cash for slow cars.

Peddle, a US-based online used car marketplace, has revolutionized the car-selling experience for its customers. With their unique approach, Peddle offers consumers a hassle-free process by providing an instant price online and arranging free vehicle pickups.

www.peddle.com

Talkdesk CX Cloud™

Talkdesk Copilot

Talkdesk for Salesforce

Peddle reduces after-call work with Talkdesk

Peddle leverages **Talkdesk Copilot** to ensure efficient customer support, enabling their agents to resolve issues quickly and accurately.

Peddle has successfully implemented the new GPT-powered **Automatic Summary feature**, which has received overwhelmingly positive feedback from agents. Peddle's agents believe it plays a crucial role in reducing after-call work and improving productivity.

Since activating the **Talkdesk's Automatic Summary feature**, Peddle agents have experienced an impressive 11% reduction in after-call work. This reduction not only saves time but also allows agents to focus on addressing customer concerns promptly. Peddle's commitment to leveraging advanced AI technology, such as the Automatic Summary feature, showcases its dedication to providing end customers with a seamless and efficient experience.

Enabled agents to work from anywhere, anytime with cloud-based solution
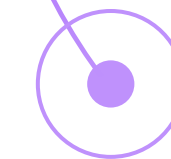
Experience. A better way.

11%

Reduction in after-call work

:talkdesk®

:talkdesk®

Read more case studies at
www.talkdesk.com/customers &
schedule a demo

Thank you!