

Solution Spotlight:

Balto + Genesys Cloud CX

New Premium App in the AppFoundry

*How Balto's Real-Time Guidance Boosts
Performance for Major Financial Services Organizations*



Welcome to Today's Webinar!

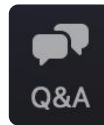


Jim Connolly

Director of Enterprise Sales,
Financial Services Vertical @ Genesys
Webinar Host/Moderator



Today's session will be about
45 minutes with time for **Q&A**.



Use the **Q&A button** on your
screen to submit questions.

Today's Speakers



David Porter

Global Financial Services
Industry Director @ Genesys



Chris Kontes

Co-founder and COO
@ Balto



Justin Sholly

Account Executive
@ Balto

Balto's Mission

Power a new era of **knowledge work** in the contact center.

Why a New Era of Knowledge Work

- Simplest interactions are getting automated
- Only the harder interactions require an agent
- Greater need for more skilled agents
- Tighter labor pool for skilled agents
- Agent pay goes up
- Agent productivity becomes critical to contact center economics
- Skilled agents create opportunities to convert the contact center into a profit center

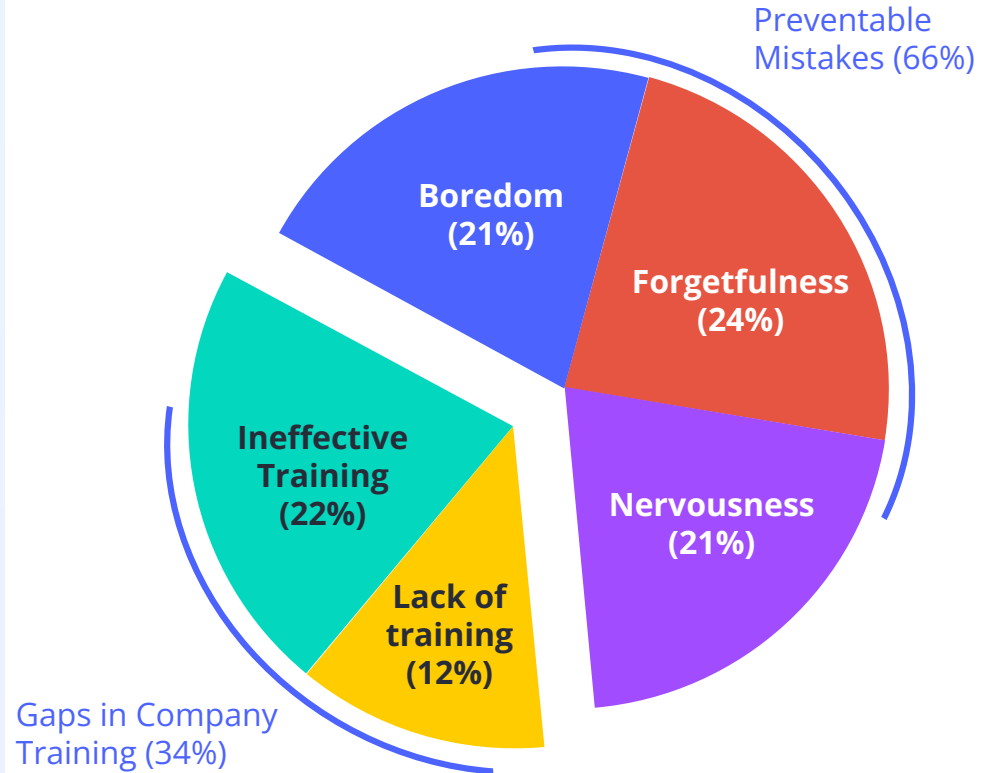
Conversations are the contact center's currency.

Yet.....

66% of agents

report that most of their mistakes are easily preventable.

Why Agents Make Mistakes



Fixing Agents' Mistakes

Why isn't coaching working?

4.2

Average # of **coaching sessions** before agents change behavior

72%

Managers find themselves **coaching multiple agents** on the same skill

35 Mins

Managers spend with the agent in **every coaching session**

Next Best Action ↔ Agent Assist ↔ Real-Time Guidance

Critical AI Features	Next Best Action	Agent Assist	Balto Real-Time Platform
Workflow reminders and prompts	✓	✓	✓
Knowledge base integration	✓	✓	✓
Live listen		✓	✓
Automatic transcription and NLP		✓	✓
Keyword-based event analysis		✓	✓
Full conversation context analysis			✓
Contextual agent prompts			✓
100% conversational visibility and reporting			✓
Win rate analysis			✓
One-button scaling of winning tracks			✓
Agent gamification and experience			✓
Real-Time Coaching			✓
Real-Time QA			✓
AI learning and relevancy improvement	No	Manual	Automatic

Balto's Vision

Scale **excellent conversations** to your entire organization with the push of a button.

A Real-Time Enterprise Suite of Capabilities that Transforms the Contact Center

Real-Time Guidance

A.I. for Agents

Automatically guide agents to be as effective as possible in real time.

Real-Time Coaching

A Manager's Dream

Equip managers to coach agents in real-time and win more calls.

Real-Time QA

A.I. Driven QA

Automatically score 100% of calls in real time.

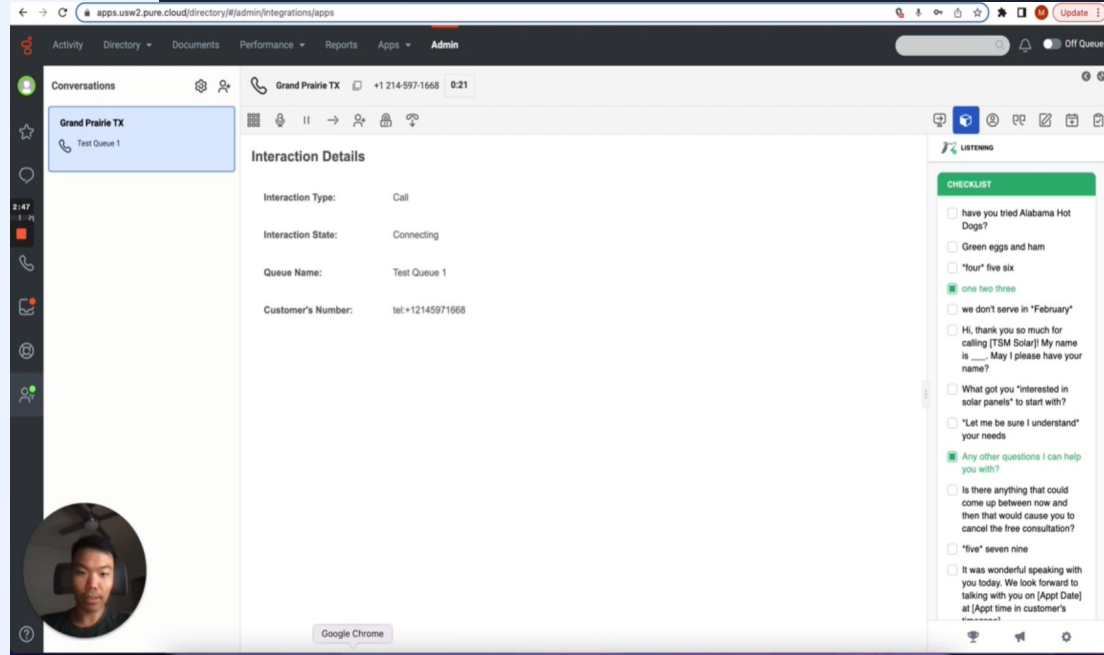
Real-Time Intelligence

Easy Insights

Access real-time insights into exactly what's working and what's not.

Single Pane of Glass: Genesys & Balto

- ▶ Embeddable Balto can be dropped anywhere on any web page, including Genesys Cloud
- ▶ No install required
- ▶ Light processing load for low-powered machines



Agents Love Balto

Make agents feel supported, not scrutinized.

66% of agent mistakes are attributable to boredom, nervousness, or forgetfulness. Balto removes these limitations to help agents thrive.

Balto's Vision for the Agent Experience:

- ▶ Continuous Improvement: Source what's working from your top agents; scale it to everyone.
- ▶ Personalization: Balto feels like your Netflix.
- ▶ Gamification: Drive behaviors that drive metrics.

"I am a new agent with eHealth, and Balto has given me confidence. I know that if I need additional help or information that Balto is there for me. Thank you for a great product!"
-Agent, eHealth



250+ 5-star reviews
4.8 star rating on G2

Balto for Financial Services



Goals

- ▶ Increase customer loyalty/reputation/CX
- ▶ Expand customer adoption of broader product portfolio
- ▶ Reduce customer acquisition cost
- ▶ Avoid costly lawsuits by ensuring compliance



Pain Points

- ▶ Collections. Ineffective negotiations lead to lost revenue
- ▶ Poor CX. Leads to customer churn
- ▶ Talent. Today's high-attrition, remote-first talent environment makes ramping agents and driving productivity an endless challenge.
- ▶ Compliance. Ever-shifting regulatory requirements creates risk such as BSA/AML
- ▶ New Competition. Fintech and digital currencies tightening market share



Balto Value

- ▶ Equip agents with accurate information and sales best practices to improve call outcomes.
- ▶ Automatically source effective sales and service behaviors from your top agents and scale them to your entire workforce with the push of a button.
- ▶ Align your entire contact center around quality and compliance standards and get real-time visibility into 100% of conversations.



Success Metrics

Revenue

- ▶ Increase collection rates.
- ▶ Improve sales conversions.
- ▶ Increase customer retention.

Customer Experience

- ▶ Reduce average handle time.
- ▶ Increase first call resolution.
- ▶ Boost customer satisfaction.

Compliance

- ▶ Increase audit and compliance scores.

Efficiency

- ▶ Reduce agent ramp time.
- ▶ Boost training efficiency.

Midwest Fidelity Services

Industry: Collections

Use Case: Compliance

“Balto offered us a powerful way to improve our results as well as look at areas to improve later. It simplified everything.”

– *Operations Manager, Midwest Fidelity Services*

[Read the full story](#)

+45%

Increase in customer satisfaction scores

30 to 1

Drop in average monthly compliance violations



+ Balto 

ONLINE Information Services

Industry: Collections

Use Case: Compliance

“I spent about two hours a day, every day managing our previous post-call analytics solution; three to four hours a day if we were making major changes, like adjusting scorecards. Now with Balto, even these more extensive changes only take 10 min.”

- Paul Lengyel, Compliance Manager

[Read the full story](#)

-15h

Reduction in weekly management time

+115%

Increase in compliance scoreboard averages

Real-Time Guidance Results

2000+ Seat P&C
Insurance Company

50%

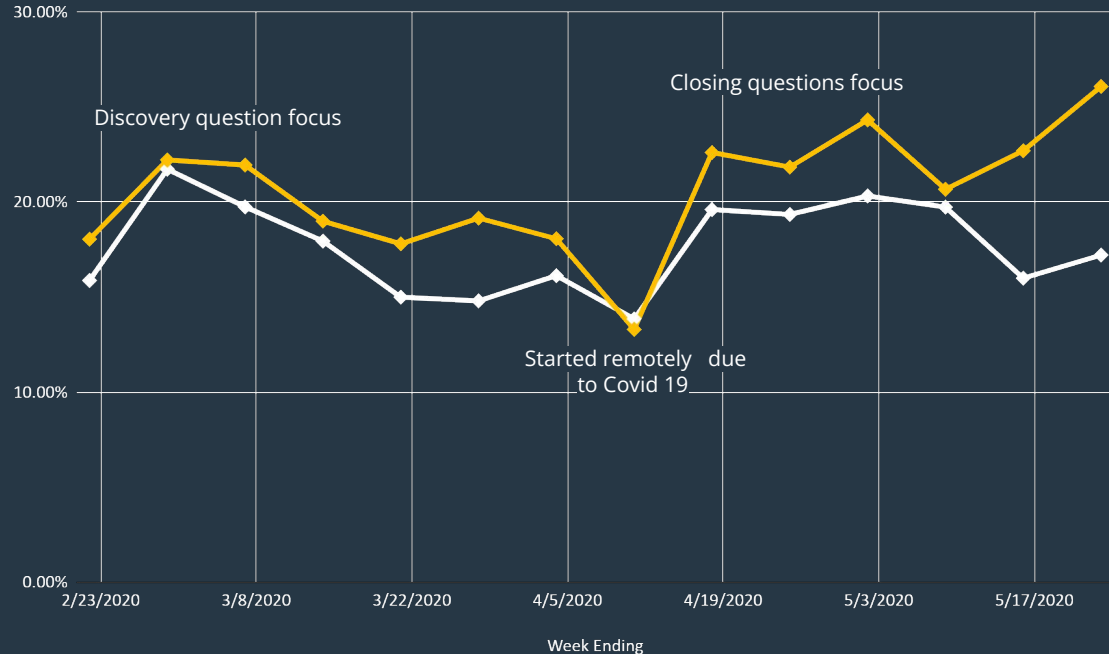
Increase in Conversion Rates

2

New Sales Divisions

Results based on statistically significant A/B test, where one group of agents receives Balto and the control group does not.

A/B Test: Control Group and Balto Group Sales Calls



 Balto Group

 Control Group

Proprietary and confidential. Do not distribute.

Real Results From Real-Time Coaching

3000 Seat Health Insurance Company Impact on Conversion (supervisor level)

Top in Balto Chat	Med Conversion	Balto Chat
Supervisor 1	16.3	322
Supervisor 2	14.1	227
Supervisor 3	11.8	216
Supervisor 4	16.6	196
Average	14.7	240.25

Bottom in Balto Chat	Med Conversion	Balto Chat
Supervisor 11	8.7	1
Supervisor 12	14.5	1
Supervisor 13	12.5	1
Supervisor 14	10.3	1
Average	11.5	1

of coaching sessions from Company X

Balto enabled **2,289** micro-coaching opportunities through chat over a 2-week period.

Average # of coaching sessions from supervisor

High-performing supervisors completed an average of **240** micro-coaching sessions over a 2-week period.

Balto's sales impact

Balto's increased overall conversion rates by **27.8%** over a 2-week period!

Live Demo

Thank you!

Q&A



Use the **Q&A button** on your screen to submit questions.

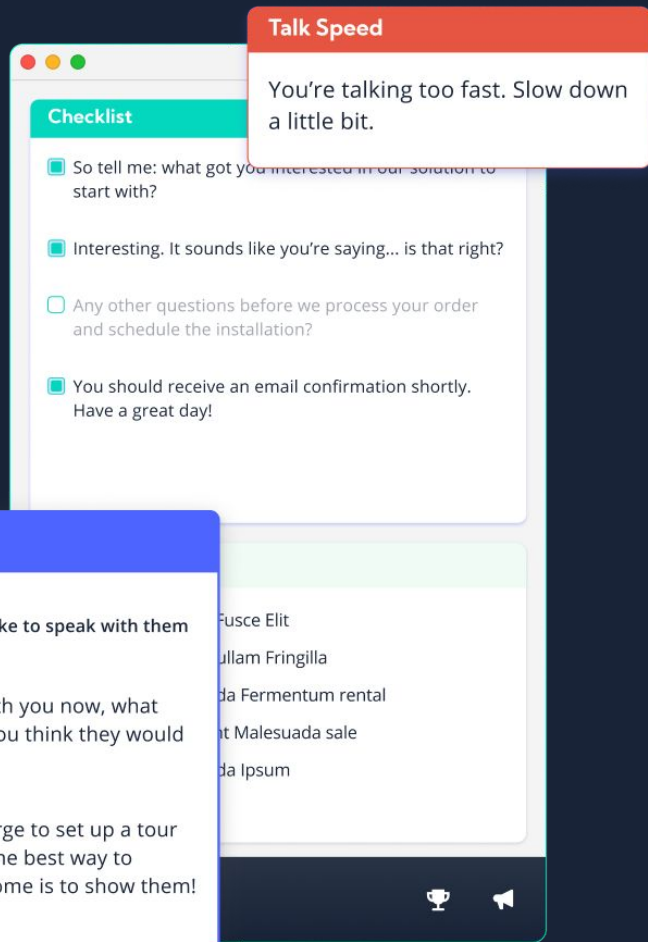
To learn how Balto can improve your team's performance, please **contact your Genesys representative**.

To schedule a personalized demo, visit balto.ai/get-demo.

View Balto's premium listing in the [AppFoundry marketplace](#).

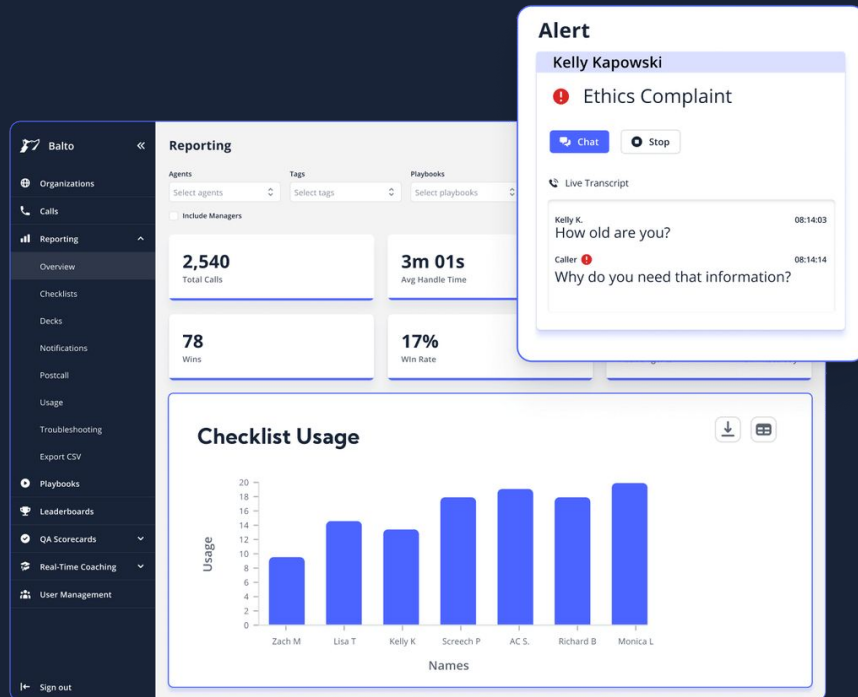
Agents Get Guidance on the Side of Their Screen

- ✓ The Smart Checklist shows agents key talking points
- ✓ Dynamic Prompts show agents phrases and questions when they need them most
- ✓ Notifications discourage bad habits
- ✓ Live Chat lets agents chat with managers to get immediate guidance for critical calls



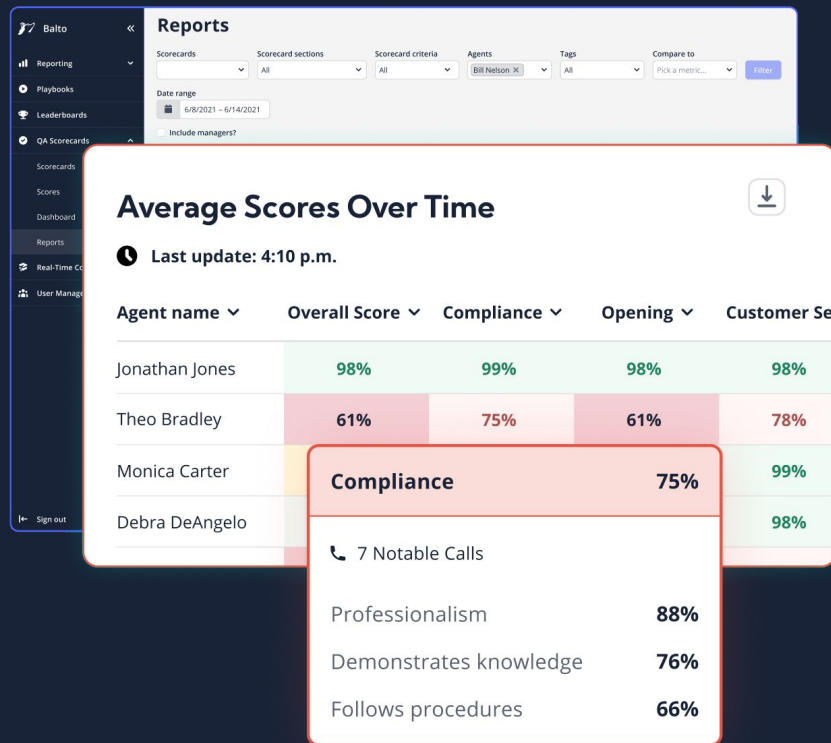
Managers Coach and Analyze Data in Real-Time

- ✓ Scale ideal conversations to all agents with Balto's Playbook Designer
- ✓ Set up alerts for key moments on calls and coach via Live Chat with Real-Time Guidance
- ✓ Dig into real-time data with Reporting and QA Scores



Quality Assurance Monitors Quality and Drives Improvement

- ✓ Set up scorecards and weighted criteria with Real-Time QA
- ✓ Identify what's driving low or high scores with Real-Time Scores
- ✓ Measure long-term quality trends and coaching effectiveness with Reports



Real-Time Guidance: Manager App

- ✓ Discover the behaviors that make you more money
- ✓ Analyze the key events of every call and direct your attention to each agent's unique strengths and improvement areas
- ✓ Narrow performance gaps by identifying the behavior of your top performers and scaling those behaviors across the team

