

Solution Spotlight:

Balto + Talkdesk Experience Cloud New AppConnect Marketplace offering

*How Talkdesk Experience Cloud Leverages Balto's Real-Time Guidance
to Boost Performance for Major Industries*



Welcome to Today's Webinar!



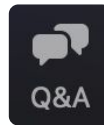
Katie Rubak

Director, Partner Marketing @ Talkdesk

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.

Companies must become customer-obsessed.

89%

of CX professionals say that delivering superior CX is one of their company's key differentiators.

86%

of CX professionals say that CX is a leading driver of brand loyalty at their company.

70%

of consumers say that they are more loyal to companies who invest in strengthening their CX.

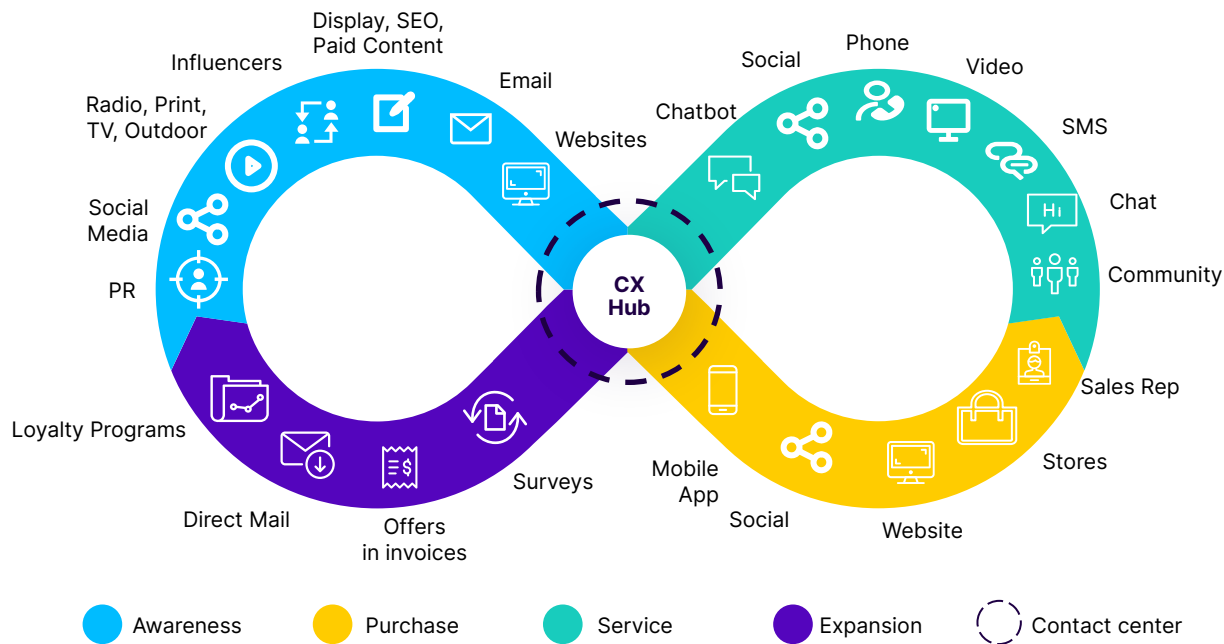


“Great experiences are no longer a nice-to have — they’re a necessity for business survival.”


accenture

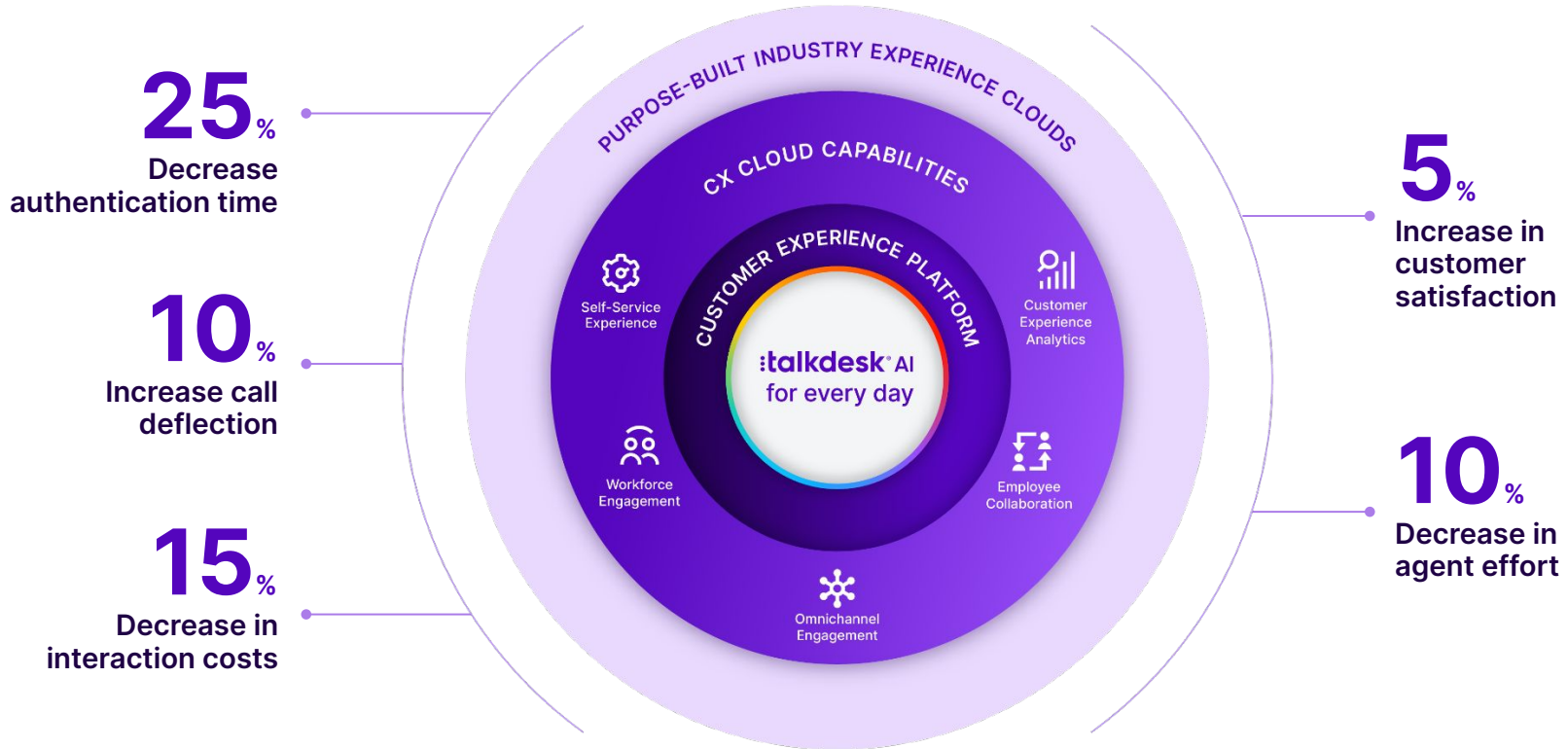
The contact center is now critical to deliver easy, seamless and personalized service to create and sustain loyalty.

The ability to resolve customer service issues on first contact is the #1 driver of customer loyalty.



*Source: Talkdesk Research, Industry Revolution Series, [Financial Services & Insurance Dec. 7, 2020](#), [Healthcare Feb. 15, 2021](#), and [Retail March 29, 2021](#).

Automation-First Customer Experience Delivers Success



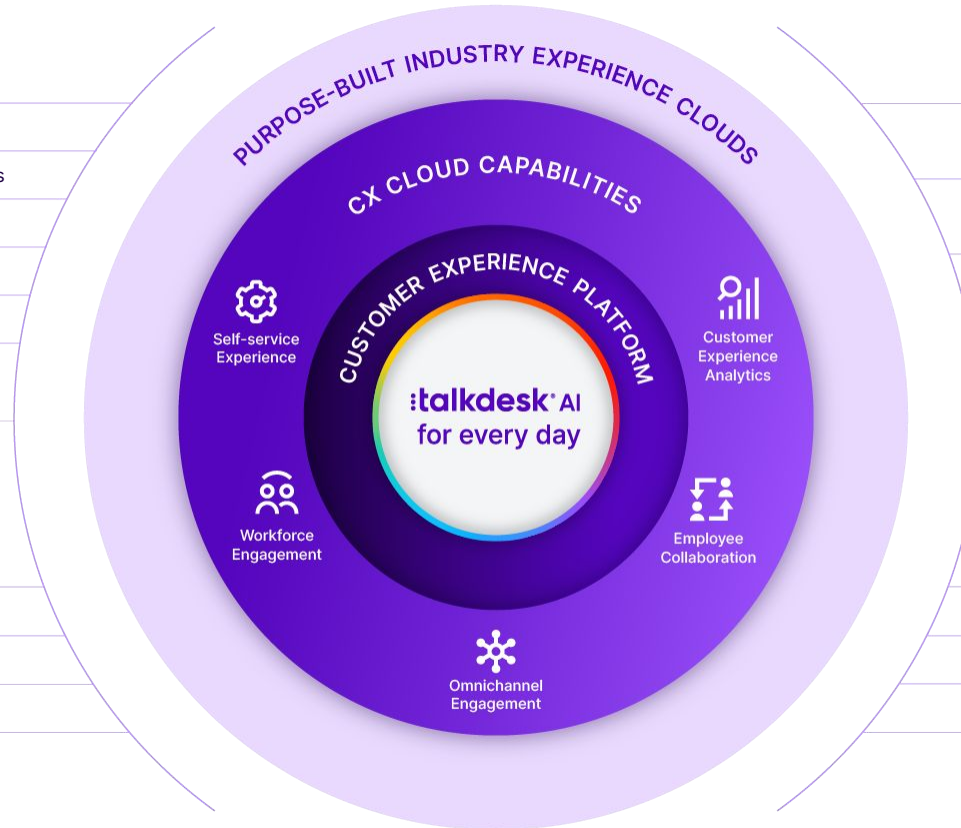
Automation-first customer experience solutions.

CX Platform

- Global communications network
- Low-, no- and custom-code tools
- Flexible deployment options
- 60+ pre-built integrations
- 30+ security certifications
- 90+ AppConnect solution marketplace

CX Services

- Success services
- Success community
- Success ecosystem



Industry Experiences

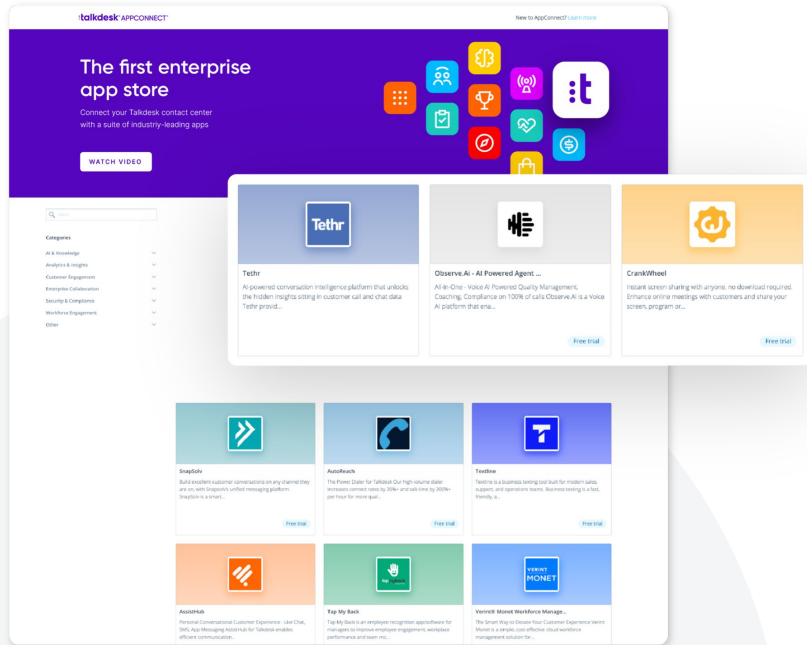
- Industry workspace
- Pre-integrated with core industry systems
- Pre-designed with custom workflows and automation
- Pre-trained with AI for industry expertise

Talkdesk AI

- Customer self-service
- Agent empowerment
- Authentication & fraud
- Operationalizing AI

Balto is on the AppConnect™ Marketplace!

Instantly connect Talkdesk CX Cloud™ with a wide variety of contact center solutions



Click-to-install

Eliminate tedious deployments with a self-service, click-to-install process allowing you to rapidly expand your contact center capabilities.



Free trials

With a 30-day free trial, you can avoid lengthy vendor approval process and contract risks when the solution doesn't fit your needs.



Simple billing

Get full control over how you manage your contact center costs with a pay-as-you-go billing model and a single invoice from Talkdesk.

Today's Speakers



Chris Kontes

Founder and COO

@ Balto



Justin Sholly

Account Executive

@ Balto

Balto's Vision

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

The Problem

Contact center agents spend 2-4 weeks in classroom training.

And then they forget 59% of their training after the 1st week.

Contact centers average 100% attrition year-over-year.

So they have thousands of agents just “cowboying it”.

And they **lose A LOT of customers** for completely preventable reasons.

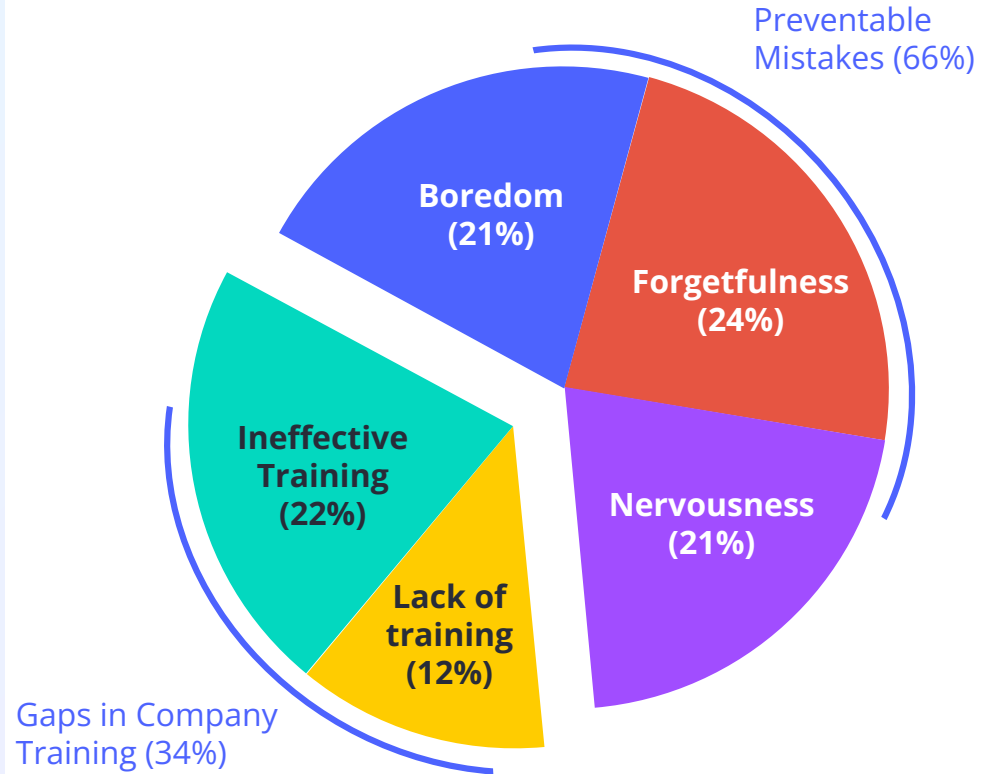


Cowboy: a business or businessperson operating in an uncontrolled or unregulated manner. Merriam-Webster, 2019.

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**

Post-Call vs Real-Time

Post-Call

- ▶ Detects mistakes *after* reps lose deals
- ▶ Burden is on managers to change behaviors
- ▶ Coaching happens when managers listen to calls ~2% of the time



Autopsy

Real-Time

- ▶ Prevents mistakes *before* they happen
- ▶ Improves reps' behaviors live on every call
- ▶ Coaching happens on 100% of calls



Life Jacket

Real-time is the holy grail.

What has every contact center wanted for decades?

- ✗ The holy grail isn't more automated touches.
- ✗ The holy grail isn't better note-taking.
- ✗ The holy grail isn't creating a profile of what your A-players do **(you already know 99% of it).**

The holy grail is everyone in your organization having **consistently excellent conversations with your customers.** That's it.

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.

Balto for Healthcare



+ Balto 

Emergicon

Industry: Medical Billing

Use Case: Collections

“The ability to have general and specific information at their fingertips gives my agents the courage to deliver an exceptional customer experience. Our customers benefit from their certainty.”

- Shannan Turner, Patients Account Manager

[Read the full story](#)

1 Minute

Reduced hold times
to avg of 1 minute

Rapid

Scalability for new clients
and guidelines

Balto for Financial Services

MIDWEST
— FIDELITY SERVICES,  + Balto 

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

Clients

 CEDARS
BUSINESS SERVICES

 CROSSCOUNTRY
MORTGAGE™

Katapult 

ON LINE
INFORMATION SERVICES

Balto for Retail



Expo Home Improvement

Industry: Home Improvement

Use Case: Quality Assurance

"The Real-Time QA has been really good for allowing us to do some real-time, on-the-spot changes in coaching and agent improvement."

- Sheldon Mallory, Contact Center Training Manager, EHI

[Read the full story](#)

+53%

Increase in script adherence

+162%

Increase in booked appointments

Balto for Insurance



National General Holdings Corp.

Industry: Insurance

Use Case: Sales

“With Balto, our agents have an extra set of ears and are always provided the appropriate response or necessary answer. Balto doesn’t get tired. It is always listening at the same caliber whether it’s early in the morning or at the end of a shift.”

- Mark Poisson, Director of AI

[Read the full story](#)

-53s

**Lower average
handle time**

+16%

**Average Increase
in conversion rates**

Agents Love Balto

Make agents feel supported, not scrutinized.

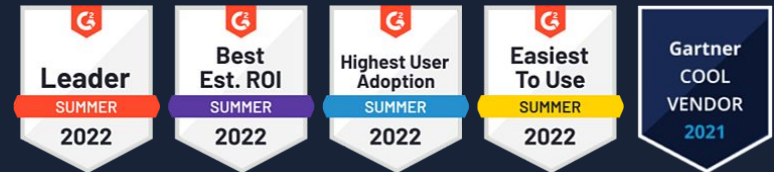
66% of agent mistakes are attributable to boredom, nervousness, or forgetfulness. Balto removes these limitations to help agents thrive.

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

Live Demo

Thank you!

Q&A



Use the [Q&A button](#) on your screen to submit questions.

For additional information and to contact the Talkdesk team, visit [Balto's listing on the AppConnect Marketplace](#).

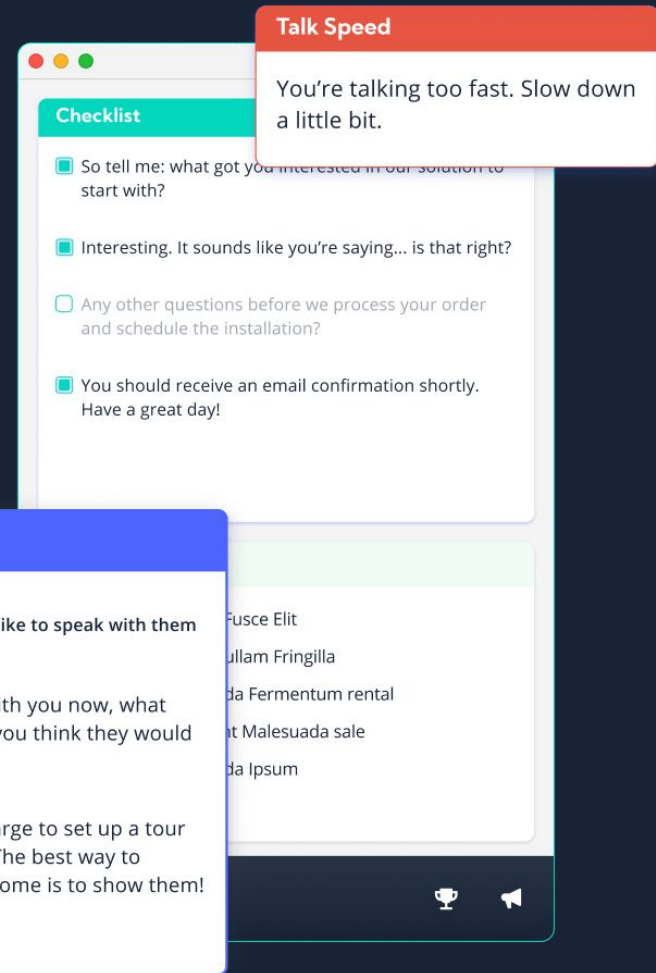


All webinar attendees have been automatically entered to win one of ten wireless bluetooth speakers.

Winners will be notified by email - keep an eye out for an email from our team!

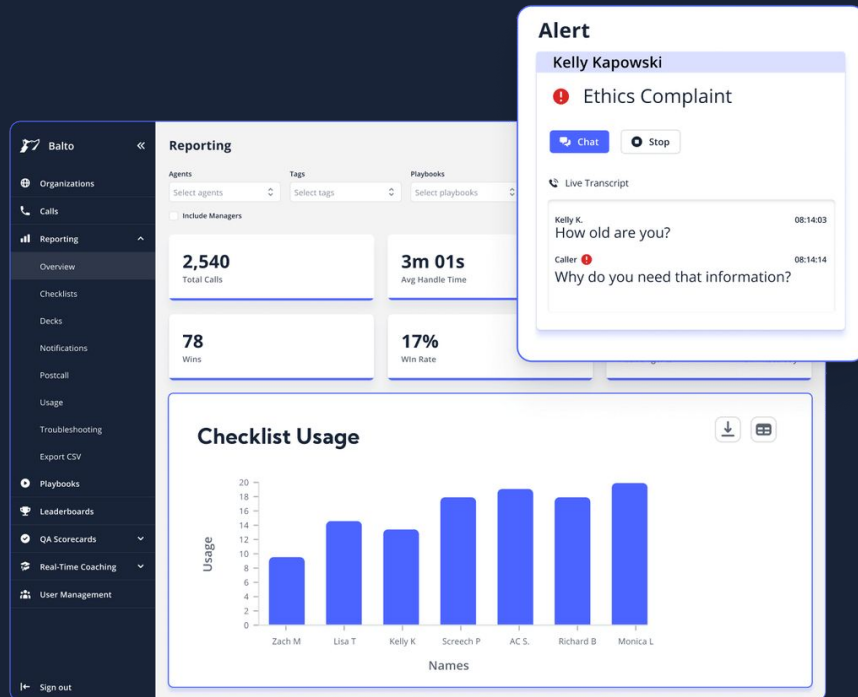
Agents Get Guidance on the Side of Their Screen

- ✓ 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



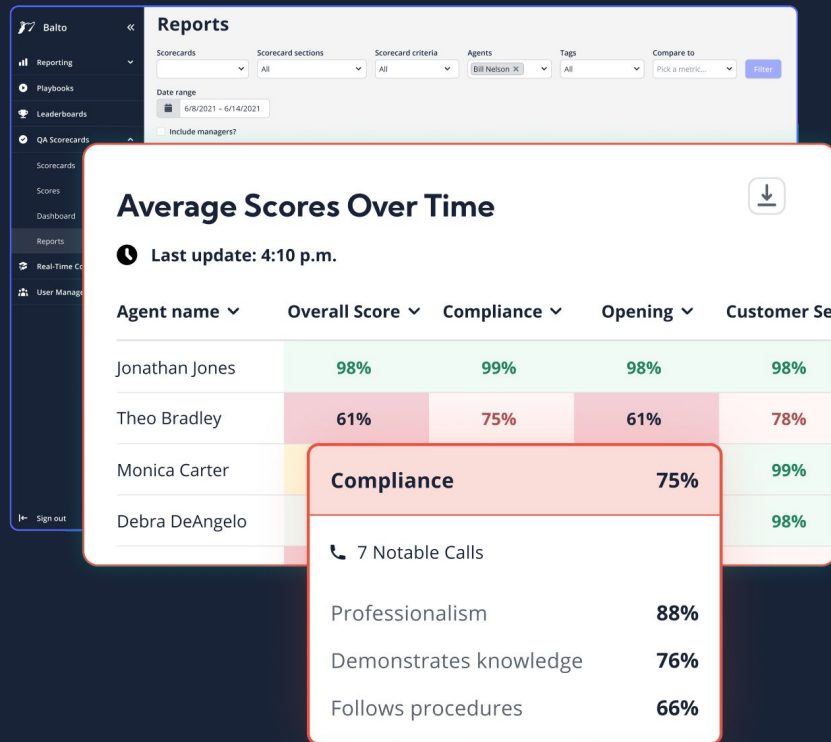
Managers Coach and Analyze Data in Real-Time

- ✓ 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

