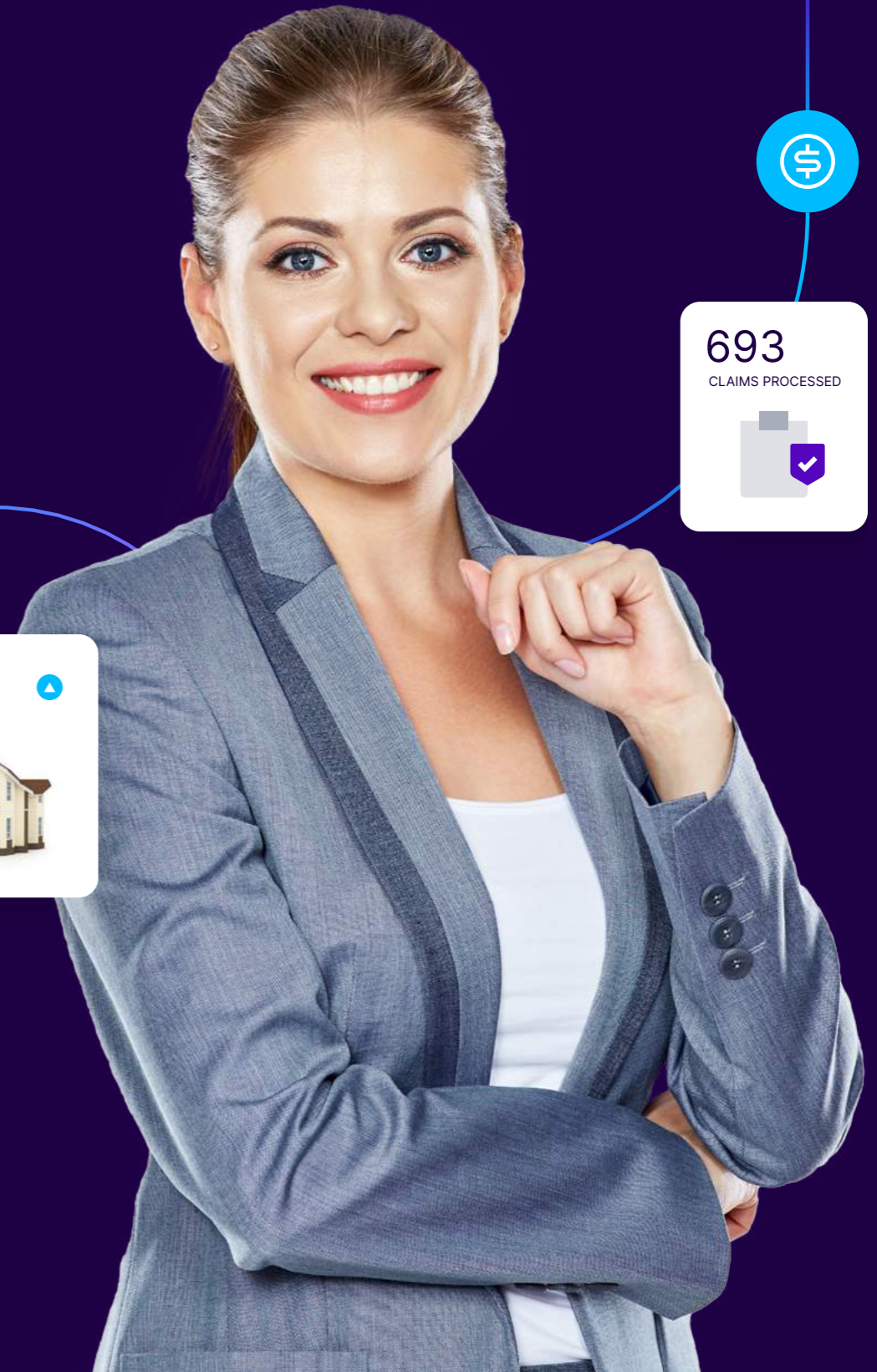
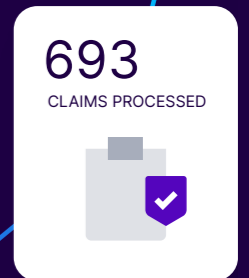
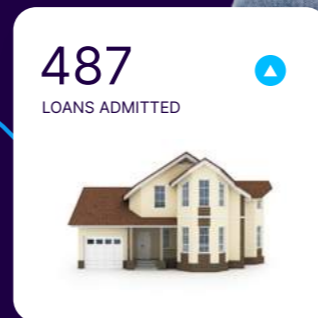


:talkdesk®

Financial Services Experience Cloud™

A better way
to a great customer
experience.



The CX imperative.

Customers have more choice and control in how they interact with brands than ever before. At the same time, the pandemic has accelerated the pace of digital transformation. In this world of digital connections, every experience is an opportunity to build trust and loyalty. Every conversation is a moment that matters.

These trends are driving the heightened emphasis **on customer experience as a growth driver.**

Financial services and insurance customers are clear about their expectations.

71%

of financial services and insurance customers are more loyal to organizations that invest in strengthening their customer experience.

82%

of CX professionals believe customers increasingly expect financial services institutions to anticipate and resolve their needs proactively.

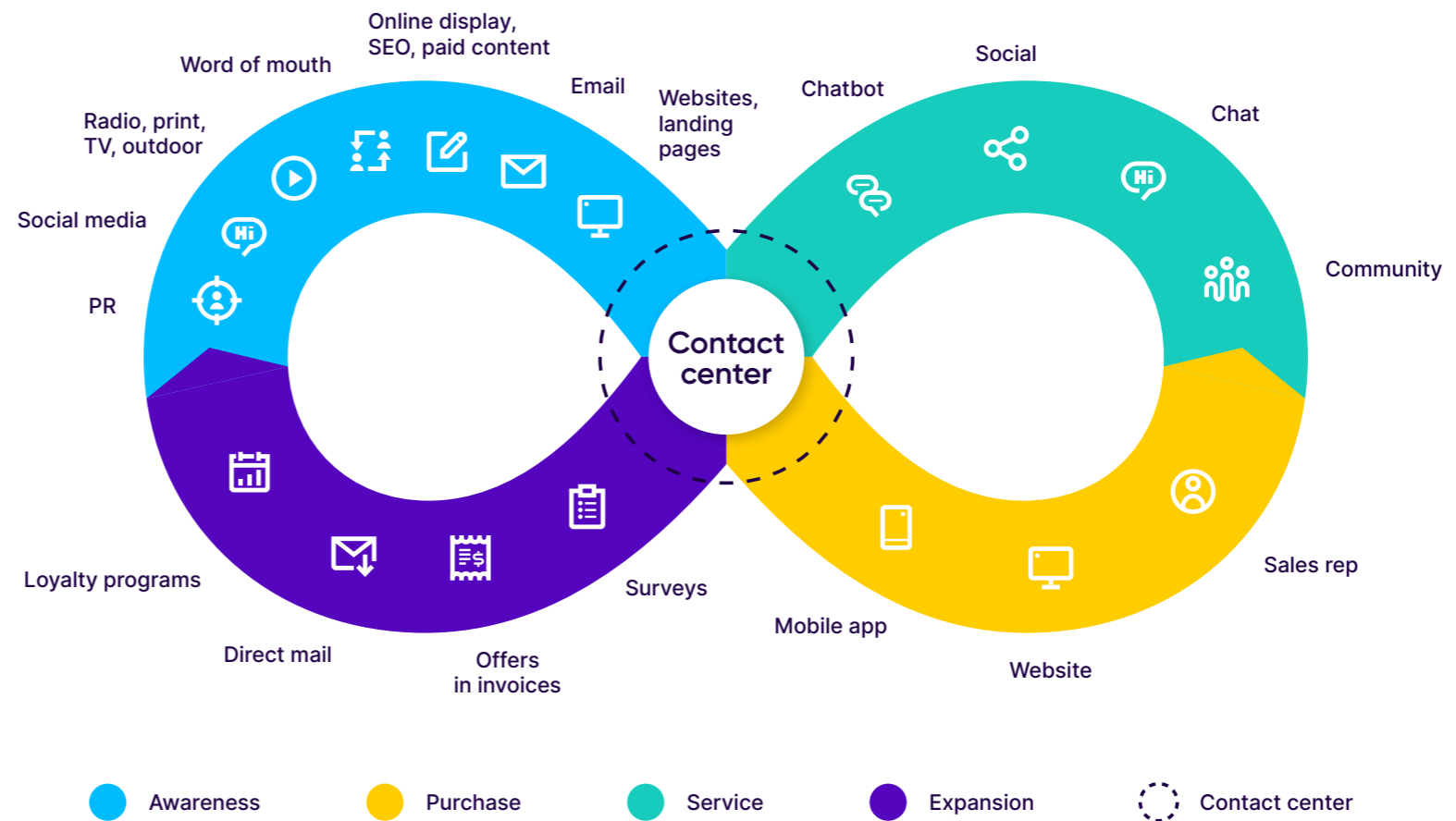
Source: Talkdesk Research™, The CX Revolution in Financial Services and Insurance, October, 2020.

The contact center is now the core of your CX strategy.

Great customer experience requires insights driven by a 360-degree view of your customers, the ability to make great data-driven decisions, and engaging experiences across all touchpoints. We have built our contact center solution to be the engine at the heart of our client's CX strategy.

77%

of financial services' CX professionals consider the contact center as a strategic asset to the business.



Source: Talkdesk Research™, [The CX Revolution in Financial Services and Insurance](#), October, 2020

Talkdesk is a global cloud contact center leader for client-centric organizations.

Here's why organizations across the globe partner with us.



Commitment to financial services and insurance

- Industry focused innovation
- Purpose-built products
- Industry thought leadership and advisory boards
- Proprietary research and insights
- Industry associations and involvement



Customer-obsessed

- 100% Uptime SLA
- White glove customer support
- Top ratings in Gartner Peer Insights, G2, AppExchange
- 95% CSAT
- >100% net retention
- Industry-specific CABs



Global leader

- Leader in Gartner CCaaS MQ 2022
- Leader in Forrester® Wave for CCaaS™
- Leader in Ventana Value Index 2021
- Leader in Aragon Globe for Intelligent Contact Centers 2021
- Frost Radar Innovation Leader 2020
- #8 on 2022 Forbes Cloud 100

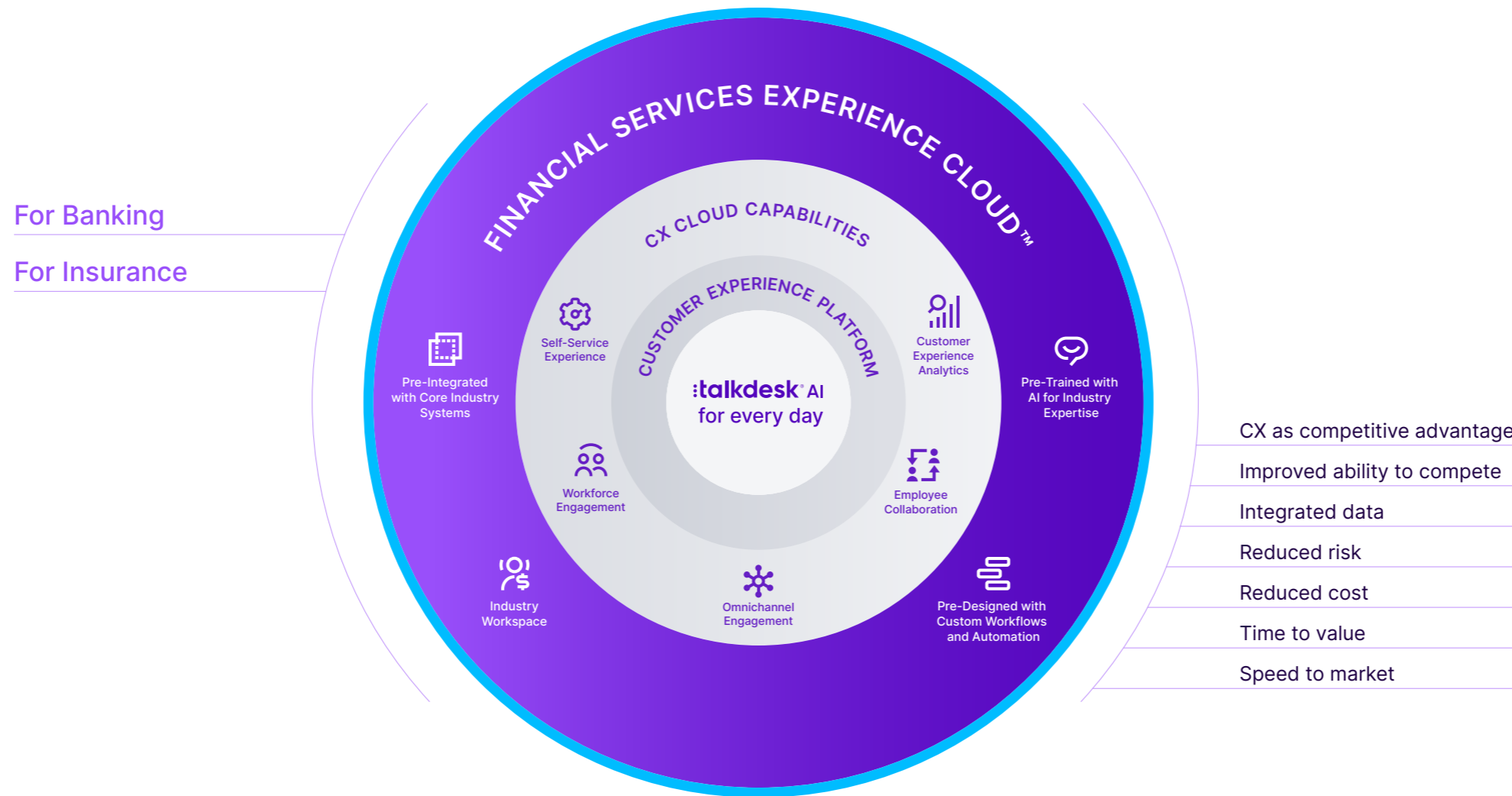
Leading financial services and insurance firms trust Talkdesk.

To deliver a better way to great customer experience.



Talkdesk Financial Services Experience Cloud™.

The end-to-end contact center solution purpose-built for financial services is designed to immediately meet industry needs and bring value on day one.



Connected

Built with out-of-the-box integrations for seamless exchange of information with core industry systems for speed and efficiency.

Intelligent

Built with industry-trained artificial intelligence expertise to drive smarter interactions.

Secure

Built with high compliance and security standards to protect client privacy and mitigate risks against data leakage, fraud, and identity theft.

Helping banks and credit unions to reimagine their customer experience.

Your customers' expectations are shaped by their experience with new technologies and the heightened innovation offered by fintechs and emerging leaders from other industries. The future of banking is about delivering a seamless, personalized, and trusted experience for the client. To do so, financial services organizations must evolve the customer experience with AI, automation, self-service, digital engagement, and reporting capabilities across banking contact centers and branches. Talkdesk helps banks and credit unions break free from outdated technology to unlock the promise and potential of a great client and member experiences.

Talkdesk Financial Services Experience Cloud™ for Banking

Business challenges

- Market disruptors
- Limited customer information
- Capitalizing on opportunities
- Compliance and security

Customer expectations

- Convenience
- Seamlessness
- Personalization

Agent needs

- Efficiencies
- Complete customer context
- Performance feedback

Account servicing

- Account transfers
- Add authorized user
- Update demographic fields
- Password reset
- Travel notification

Loan servicing

- Loan inquiries and lead capture
- Loan/account follow-up
- Generating payoff quotes
- Promise to pay notification

Payments & collections

- Process payment
- Collections/payment deferment
- Payment reminders and follow-ups
- Payment details

A better way for banking.

Talkdesk Financial Services Experience Cloud™ for Banking is an end-to-end contact center solution designed and built from the ground up to meet the unique needs of banks, including out-of-the-box integrations to core banking systems, automated workflows for account servicing, lending, payments & collections, and AI and omnichannel capabilities that work together to deliver a clear view of your client and their needs.

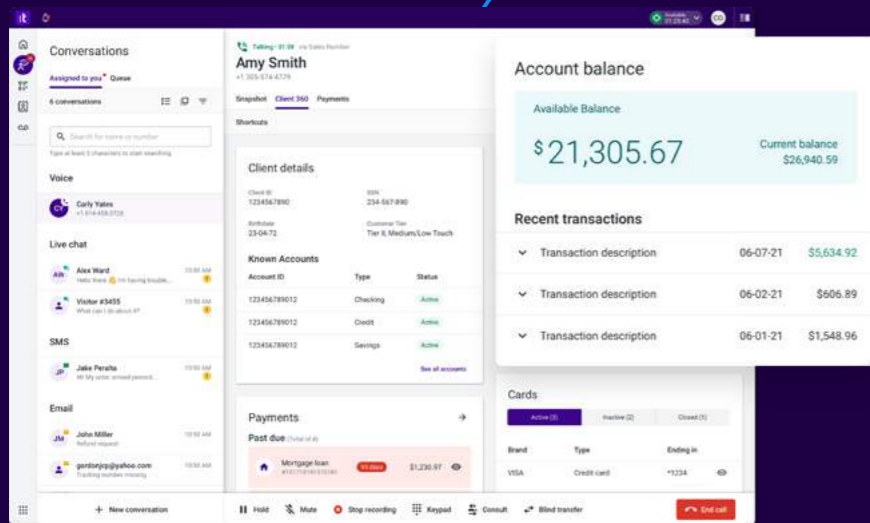
Banking agent workspace

Pre-integrated with FIS, Jack Henry, and Fiserv

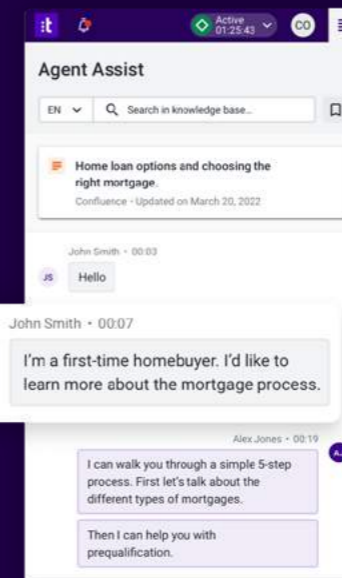
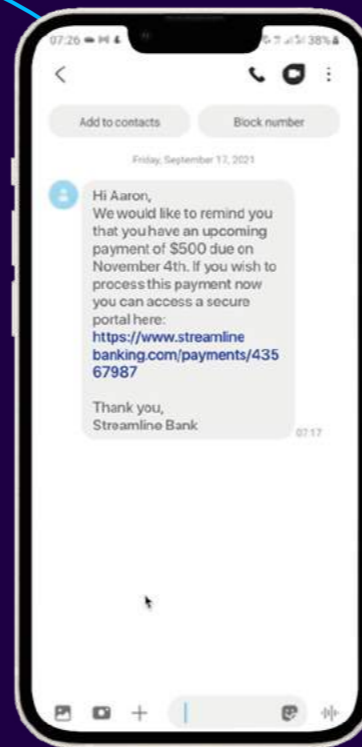
Pre-designed with banking-client workflows

Pre-trained with AI for financial services expertise

BANKING WORKSPACE



AUTOMATED PAYMENTS & COLLECTIONS



AI ENABLED AGENT ASSISTANCE

Helping insurers to redefine their customer experience.

The insurance industry is at an inflection point with customer experience. You face tremendous pressure on growth and profitability spurred by industry consolidations, market volatility, cyber threats, new market entrants, climate change, and more. At the same time, customers are expecting more convenience, frictionless journeys, and individualized support. Leading insurers recognize the need to redefine the customer experience with AI, self-service, digital engagement, and personalized proactive outreach. Talkdesk can help you evolve to meet current business, customer, and employee needs.

Talkdesk Financial Services Experience Cloud™ for Insurance

Business challenges	Growth/profitability pressures Outdated capabilities Data silos Customer/employee retention
Customer expectations	Convenience Seamlessness Personalization Empathy
Employee needs	Complete customer context Reduced complexity Efficiencies

Policy Servicing	Basic policy changes New ID cards Cancellations & reinstatements Endorsement handling Add additional insured
Claims	FNOL Open a claim Close a claim
New Business	New policy Renewals

A better way for insurers.

Talkdesk Financial Services Experience Cloud™ for Insurance is an end-to-end CX solution purpose-built to unify the customer journey across policy servicing, claims, and new business. Deep integrations with claims management, policy administration, and CRM systems provide a single view of the customer and power time-saving workflows and automations. Pre-trained AI and insurance intent libraries combined with digital engagement channels enable seamless, personalized, and digital-first customer experiences.

Insurance agent workspace

Pre-integrated with CMS & PAS

Pre-designed with carrier-customer workflows

Pre-trained with AI for insurance expertise and empathy

INSURANCE WORKSPACE

Policies (3)

Type	Number	Delinquency	Status
Home owners	6380018572	NO	In force
Personal auto	8397564920	NO	In force
General liability	3748104739	NO	Expired

Claims (5)

Number	Product	Policy	Status
000-00-000028	Personal auto	8397564920	Closed
000-00-000213	Home owners	6380018572	Open
000-00-000094	General liability	3748104739	Closed
000-00-000177	Home owners	6380018572	Open
000-00-000135	General liability	3748104739	Closed

Claims Status

Outbound SMS number: +1 305-123-4567

Destination number variable: mobile_phone_number

AUTOMATED CLAIMS STATUS

Hi Carly, We have received your Auto Claim. Your Claim number is 000-00-123456. Claim here.

Hi Carly, The status of your Claim 000-00-123456 changed to Closed.

AI ENABLED AGENT ASSISTANCE

Agent Assist interface showing search results for "How to choose amongst personal auto insurance types", "What factors determine the price of auto insurance?", and "What are the key differences between collision coverage and comprehensive coverage?".

About Talkdesk.

Talkdesk® is a global cloud contact center leader for customer-obsessed companies. Our automation-first customer experience solutions optimize our customers' most critical customer service processes. Our speed of innovation, vertical expertise, and global footprint reflect our commitment to ensuring that businesses can deliver better experiences across any industry and through any channel, resulting in higher customer satisfaction and accelerated business outcomes.

Innovative companies around the world, including WaFd Bank, Apple Federal Credit Union, Zego, Lemonade, and Root Insurance partner with Talkdesk to deliver a better way to great customer experience.

Learn more and request a demo at talkdesk.com/fsec

