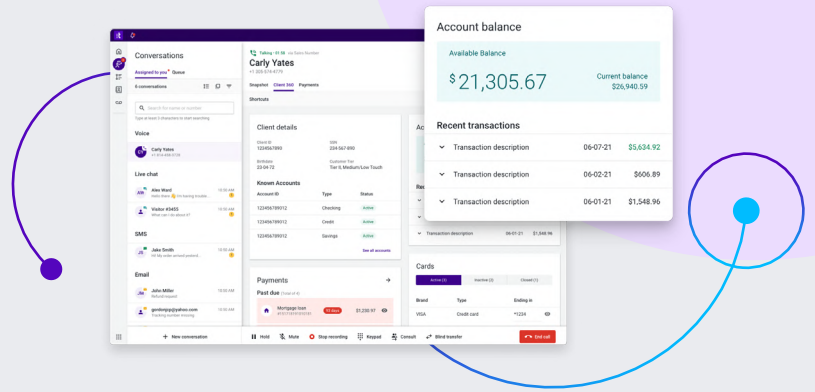# :talkdesk®

Talkdesk Financial Services Experience Cloud™

A better way to great member experience.

Helping credit unions to reimagine member experiences.

Member's expectations today are shaped by their experience with new technologies and the heightened innovation offered by fintechs and emerging leaders from other industries. Credit unions need to meet their members where and when they want to engage with them. To do so, credit unions must evolve the member experience with AI, automation, self-service, digital engagement, and reporting capabilities across contact centers and branches. Talkdesk helps credit unions embrace "phygital" and break free from outdated technology to unlock the promise and potential of a great member experience while delivering accelerated time to value.

Talkdesk is a cloud contact center leader for member-centric credit unions.

Here's why credit unions partner with us.

Commitment to financial services

Industry focused innovation

Purpose-built products

Industry thought leadership

FSI advisory board

Proprietary research and insights

Industry associations and event involvement

White glove support

Fast and risk free deployments

100% Uptime SLA

Dedicated 365 24/7 support 95% CSAT

>100% net retention

Industry-specific CABs

Recognized leader

Leader in Gartner CCaaS MQ 2022

2022 Forbes Cloud 100 (#8)

Leader in Forrester Wave for CCaaS 2020

Leader in Ventana Value Index 2021

Leader in Aragon Globe for Intelligent Contact Centers 2021

Frost Radar Innovation Leader 2020

Leading banking institutions trust Talkdesk.

To deliver a better way to great member experiences.

apple FEDERAL CREDIT UNION   COLLINS COMMUNITY CREDIT UNION   CONSUMERS CREDIT UNION   Great Basin FEDERAL CREDIT UNION   WaFd Bank   JAX FEDERAL CREDIT UNION

# Talkdesk Financial Services Experience Cloud™

An end-to-end contact center solution designed to meet the unique needs of credit unions, including out-of-the-box core banking and CRM integrations, automated workflows for account servicing, lending, payments & collections, and AI and omnichannel capabilities that work together to deliver a connected, cohesive and contextual member experience and to empower employees with a complete view of the member relationship that improves productivity and efficiency.

Financial services agent workspace

Pre-integrated with FIS, Jack Henry, and Fiserv

**Pre-designed with member workflows**

Pre-trained AI for financial services expertise
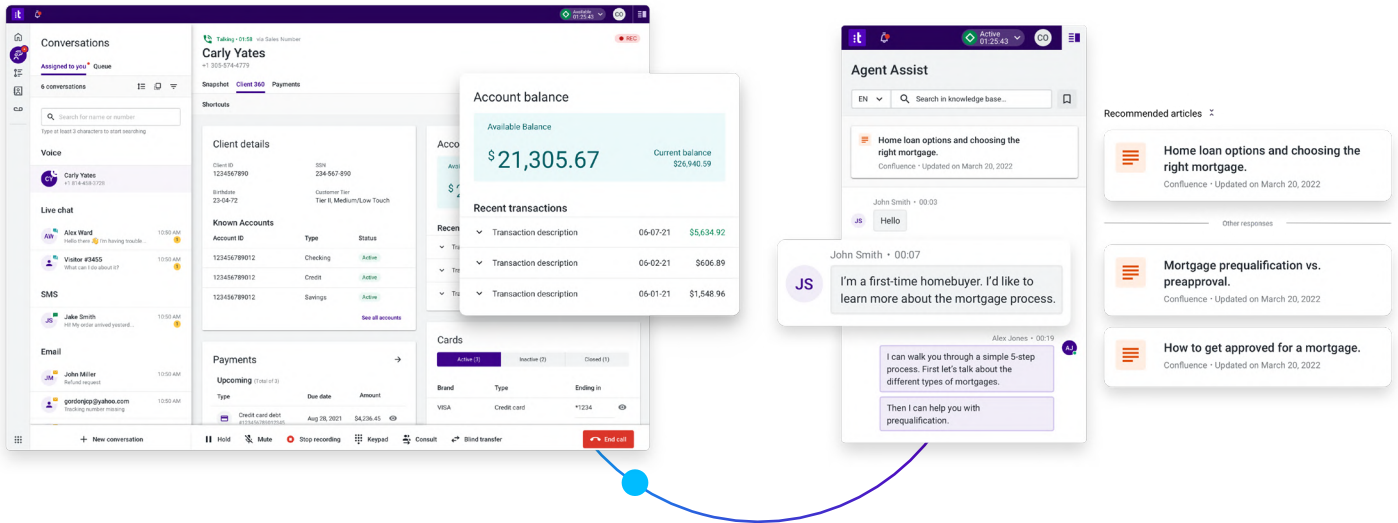
Key features

Integration with core banking systems and CRMs connect vital member data including account details and transactions for a holistic view of the relationship.

Agent workspace surfaces member information, credit card transactions, loan payments, previous interactions, and other customer context in a single, unified view for increased efficiency and speed to resolution.
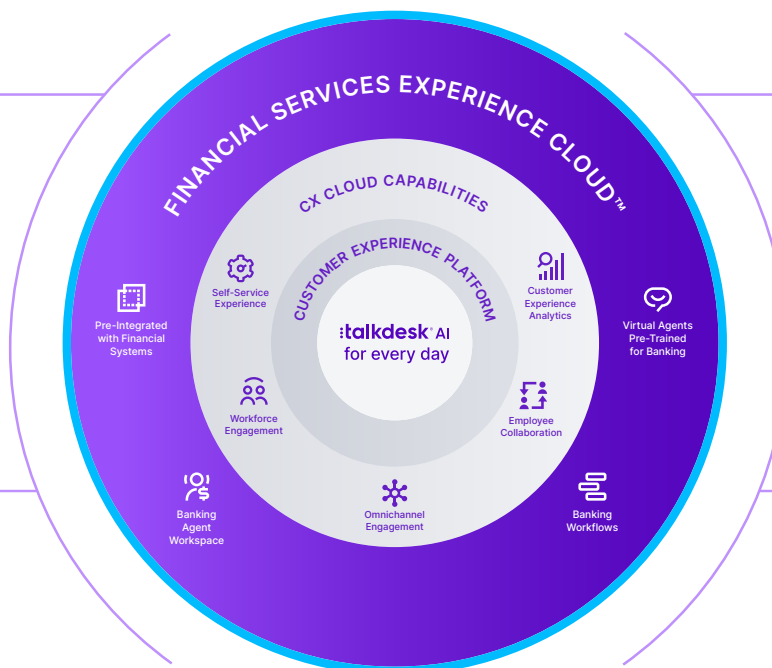
Virtual agents for financial services are conversational bots which autonomously solve member issues with a human-like experience powered by AI that's pre-trained to understand credit union scenarios and handle them with empathy.

Financial services workflows leverage AI and integrations to automate processes and streamline account servicing, lending, and payments & collections.

Key capabilities

Core Banking Integrations
Jack Henry | Fiserv | FIS | Correlation

Voice Engagement
DTMF IVR | NLP IVR | Auto-Attendant | Auto Answer | Transfers | Call Backs | Voice Biometrics Authentication

Digital Engagement Channels
Email | SMS | Chat | Facebook Messenger | WhatsApp

Customer Feedback
IVR CSAT | SMS CSAT | Text & Transcript Analytic | Automated Actions Live Feedback Stream | Dashboards

Virtual Agents
Voice Bots | Chat Bots | Conversation Designer | Live Agent Escalation | AI Trainer through Human-in-the-loop technology

Outbound Dialer
Predictive | Preview | Power | Campaign Management | List Management Agentless Mode | Reporting

Proactive Notifications
Configure Rules & Content | Personalized Messages | Send SMS from Flow

Visual Engagement
Cobrowse | Video
*Supported via AppConnect Partner

Call and Screen Recording
Full-screen Synchronized Voice & Screen Playback | Multi-monitor & After-call-work | Recording | Scoping And Retention Configurations

AI-powered Agent Assist
Federated search | Multilingual Search | Knowledge Base Connectors | Real-time Transcription | Next-best-action | Conversation Timeline

Live Reports & Dashboards
Real-Time Dashboards | Historical Reporting | Live Wallboard | Scheduled Reports | Reporting APIs

Quality Management
Build Scoring Forms | Advanced Recording Player UI | Evaluate Agent Interactions | Calibration & Sampling | Automatic Interaction Scoring

Workforce Management
AI-enhanced Forecasting | Scheduling | Shift Templates | Adherence Monitoring | Agent App

Performance Management
Leaderboards | Coaching Sessions | Performance Exception Notifications Agent View

Interaction Analytics
Speech & Text Analytics | Sentiment | Topic & Intent Detection Custom Vocabulary | Dashboards | Keyword Search & Notifications

Visual Designer for Advanced Routing (Studio)
Call Flow Designer | Intelligent Routing | IVR Reporting | Studio Functions | Traffic Splitter | OOTB Data Dips

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:talkdesk®
Experience. A better way.

[Talkdesk Financial Services Experience Cloud™](#)