

## Executive Overview

- HQ: Palo Alto, CA
- ~300 employees
- Recent Series D \$125M in Nov '24, \$270M raised
- CEO Ping Wu founded Google CCAI, co-Founder Tim Shi - OpenAI
- Customers include Verizon, Cox, Hilton, Square, United Airlines, UHG, etc.

## Product & Service Offerings

- Agent Assist Copilot - with real time behavioral coaching, chat automation, AI Summaries, Knowledge Assist
- Omnichannel AI Agent - deliver AI-powered, human-like automation across channels. **Cresta AI Agent** adapts to customer needs, maintains context, and improves contact center ...
- Conversation Intelligence - which includes Insights Topic/Behavior Discovery, Customer insights, Sentiment, Trends, Performance Insights
- Automated Quality Management - includes Automated QA Scoring, Hybrid QM Workflows, Process Scorecards, Screen Recording
- Coach - GenAI Coaching, Coaching plans, Conversation library
- Opera - no code AI workflow engine - clicks, not code

## Sales Engineer Take On Best Fit

Cresta equips resellers with a next-gen AI platform that transforms contact center performance without the complexity. Cresta's solutions include real-time agent coaching, automated quality management, self-service and automation, and behavior-driven insights that help clients boost CX, cut costs, and drive revenue—often within weeks, not months.

Dave Watson, UCaaS, CCaaS & CX AI

## Key Features & Differentiators

- State-of-the-art AI models & systems - Crest is purpose-built, customized, and optimized with bespoke use case models to achieve unmatched accuracy, quality, and performance at scale
- Outcome-driven behavioral insights - discover the true drivers of mission-critical KPIs to take targeted actions that deliver more value, faster.
- End-to-end, no-code AI platform - Train and deploy custom AI models across an integrated solution suite using clicks, not code.

Via Cresta Opera, clients can use semi-supervised AI workflow builder to train, build, deploy and iterate

- AI models quickly and easily providing a deep level of accuracy not seen with other tools.
- A true partner in delivering results - Drive transformation and co-innovate with a deeply experienced team that's laser focused on value realization.

## Top Industries Served

- Financial Services
- Automotive
- Insurance
- Retail & Consumer Products / eCommerce

## Ideal Customer Profile

Core Use Cases:

- Revenue Generation: Single interaction sales, Collections, Retention
- Customer Care, Service-to-Sales

Ideal Customer Profile:

- High Volume contact centers w/single Interaction Outcomes
- Voice, chat, messaging
- Minimum 100 agents
- Based in Americas, UKI

## Qualifying & Technical Questions

When to bring in Cresta?

- Enterprise accounts with complex Auto QM and/or Agent Assist needs
- Customer with both chat and voice channels

What to be listening for?

- Customers who want to improve their sales or service-to-sales performance.
- Desire to automate the QA process - but don't want to just stop there.

Discovery Questions:

- What are the most important outcomes you are trying to achieve with your customer interactions? (sales conversion, collections yield, customer satisfaction, retention rate, average handle times, etc.)

- Do you have visibility into the performance of your teams on every
- conversation for the behaviors that matter most?
- What do you think makes a top performer at your company? Why are they
- more successful than the rest of your agents?
- What are some ways you're bridging the performance gap on your teams?

#### Technical Questions:

- Details on the client tech stack - CCaaS, CRM, channels used, KM sources
- What coaching or QM tools are you using today?
- Are you using any conversational analytics tools today?

## Elevator Pitch

Cresta has an end-to-end GenAI platform that combines the best of AI & human intelligence, transforming conversations & workflows at every level of the contact center to save time & costs, differentiate the customer experience, & increase revenue growth.

## Objections & Rebuttals

### **My current provider CCaaS/CRM/ WFM already has an agent assist.**

Many of these solutions are disparate features, designed to check boxes on RFPs and not unified as a platform. Cresta is focused on outcomes, providing AI solutions trained on your data.

### **My organization would love to adopt new genAI conversation AI but we do not have any budget?**

Understood. Yes, there is an investment but there is also enormous potential for cost savings and revenue increases. Cresta will take time to deeply understand your goals and build a value hypothesis and business case grounded in real data and results.

### **Our company is still trying to figure out our AI Strategy.**

That's great to hear. Cresta is a leader and can help guide you with transparency on your goals and how AI will or will not apply. They can also help in navigating any type of

AI council or ethics/bias testing that you may be concerned about.

### **Our IT team is looking to build something in house.**

That can be challenging as it usually takes more time for partial underwhelming capabilities and ongoing resources to maintain it are a hidden challenge. The smart play would be to hedge your bet for the next year while you build.

