Executive Overview

- Headquarters: Larkspur, California
- 8 Years in business
- 45 Employees
- 700 Customers
- 54 Countries

Product & Service Offerings

- Conversational Workflow (for contact center agents) Customer Self Help Workflow
- SaaS subscriptions
- Professional Services when required

Key Features & Differentiators

- Zingtree is a unique combination of workflow and knowledge base in one integrated experience. We deliver content as needed, in the context of conversation & guide the agent or customer through complex processes one step at a time.
- Compared to other "agent assist" type solutions, Zingtree delivers an incredibly short time to value, lower total cost, and low risk for achieving ROI. In many cases, production workflows can be configured and in the hands of agents in a few days. Once implemented, business users can easily build, manage and update process flows in real time. Zingtree is about enabling humans to get the right information at the right time and following proven workflows to accomplish their task.
  - We are not a chat-bot, but we work great with them. Zingtree fits in when the automation ends, and a human is required. We support the agent in real time to follow proven flows that result in happy customers, agents and customer experience managers.
  - We are not "Agent Assist", but we work great with it. Many agent assist tools are great at suggesting potential content that may apply to a customer's needs. Zingtree goes a step further by guiding the conversation and completing work while providing an experience only a human can deliver.
  - Zingtree can be a Knowledge Base, but we're more than that. Knowledge can be delivered one step at a time through guided experiences, or we can also link to existing KB's to take advantage of existing content
- Zingtree's close rate on new opportunities in our ICP is 45%. Customers can make decisions on Zingtree fast. 80% of our deals close in less than 60 days
- Zingtree fits in to any CX technology stack and is a great foot in the door, or add-on sale for CCaaS customers Zingtree can be integrated into agent UIs in minutes using our standard iFrame publishing link option (iframe code provided out of the box)
- Zingtree uses a standard webhook architecture to allow for easy integration
- We offer many packaged integrations with common CRM, Service Desk and CCaaS platforms (we live wherever the agent lives)

Top Industries Served

- Other

Ideal Customer Profile

- Zingtree is a great fit for any contact center or customer experience organization that wants to improve agent performance or deflect tickets through customer self help capabilities. If you have opportunities, we're in and will support you! However, we are exceptionally strong with the following profile:
  - Agent Count: 20 – 500 (we support several customers with 1K+, but hunting deals in this range is very effective) Company Size: 100 – 5,000 employees
  - Key Titles: Contact Center & CX Operations, Contact Center Directors, Managers & Supervisors, CX Managers
  - Use Cases: Product Support, Customer Service, Appointment Scheduling, Inbound/Outbound Sales, & Collections
  - Customer Tech Stack: standard CRM, Service Desk or CCaaS platforms. This also includes traditional, on-prem Contact Center systems like Avaya and Cisco

Qualifying & Technical Questions

1. How long does it take for an agent to be fully ramped? Can you walk me through your onboarding and training process for new hires, and where you wish it was more efficient?
2. Who manages the new agent onboarding process?
3. How complex are the customer interactions and processes?
4. Do agents collect a lot of information while on calls? Where does this data go?
5. Do agents have to work in multiple systems to do their job?
6. How effectively do you handle attrition? What's your cost to replace an agent or a knowledge worker?
7. What are your agents currently using to ensure they're following standard operating procedures (SOPs) and compliant with processes?
8. How do you currently manage what your agents say? How do you currently ensure your agents are compliant with your call scripts?
9. How often are agents putting people on hold to read a knowledge base article or look up a process?
10. How often do you introduce new processes, products, or services that require new training for your agents?
11. What is your average handle time & first contact resolution? How much would a 5% improvement impact your business?
12. How much time do your agents spend on after call work?
13. What systems do your agents work in as their core system? CCaaS, CRM, Service Desk?

Elevator Pitch

- Zingtree elevates contact center agent productivity through next generation agent scripting and decision tree tools that we call Conversational Workflow. You can embed the flows you create inside of the UI where agents work. Zingtree delivers:
  - Huge reduction in new agent ramp time & cost
  - Decreased call handle time
  - Increased call compliance
  - Improved agents' confidence and ability to support many products or highly complex scenarios
- Some might call this call scripting or decision tree software. We call it conversational workflow because it implies:
  - It's human-focused (not AI)
  - A 2-way step-by-step workflow that guides the agent
  - The ability to trigger actions/processes in the background Ability to integrate data to and from third party systems to simplify processes and improve efficiency, job satisfaction and customer experience.

Objections & Rebuttals

1. **We already have an agent scripting tool in our Contact Center (CRM or Service Desk) platform…**
2. **We use a chatbot or agent assist tool…**
3. **Agent Scripting and Decision Trees are old school. My processes are too complex…**
4. **It takes too long or is too difficult to build all the workflows our agents will need.**

1. How is it working for you? Zingtree has hundreds of clients who have integrated with the current contact center platform because Zingtree handles processes the others can't. Can you build new flows yourself or do you need IT support?
2. What happens when the AI fails, and a person has to get involved. What tools do you agents have to make them better at answering complicated questions?
3. You haven't looked in a while, have you? Zingtree is so much more than that. This isn't grandpa's decision tree.
4. Zingtree has customers who have built and manage thousands of flows in a matter of weeks. We would be happy to connect you references to learn more.

3