

## 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?