

talkdēsk

Professional Services

IMPLEMENTATION PROCESS

**clara**

# Overall Implementation for Clara Includes

talkdesk

- On-Site Kickoff
- On-Site Agent, Admin and Supervisor Training
- Virtual Meetings during Implementation
- On-Site Go-Live
- Post Go-Live Office Hours (in-person or via Screenshare)

# Client Success: Charting the Course

Understanding customer's goals and how Talkdesk will align with their needs



## GOAL-SETTING & MANAGEMENT

- What is the customer's vision for a unified voice solution?
- What are their Top 3 Priorities for their Support/Sales/Back office teams in the next two quarters?
- What is their growth forecast? How are they planning to scale?



## ACHIEVING OPERATIONAL EXCELLENCE

- Which support KPIs are important to each customer team?
- How do the customers' KPIs measure up against industry benchmarks?
- Which workflow adjustments should we consider in order to improve efficiency?



## THOUGHT LEADERSHIP

- Share industry best-practices
- Partnership on beta opportunities
- Customer advisory panel

# Sample Engagements



## CUSTOMER X

### PROFILE

- Leading cloud-based e-commerce platform; 350 seats

### CHALLENGES

- Rapid scaling needs (outgrowing custom in-house solution; 3x growth in user-base in 12 months)
- Robust reporting requirements
- Merchant authentication

### TALKDESK SOLUTION

- Phased deployment & structured change-management
- Collaborated with client's Operations team to develop innovative solutions to meet requirements



## CUSTOMER Y

### PROFILE

- Multinational internet/telecom service provider (3 brands); 250 seats

### CHALLENGES

- Multiple geographies
- Rapidly-changing business requirements

### TALKDESK SOLUTION

- Agile platform empowered customer to address retention and customer acquisition pain points



## CUSTOMER Z

### PROFILE

- Major marketing-services holding company; 85 seats

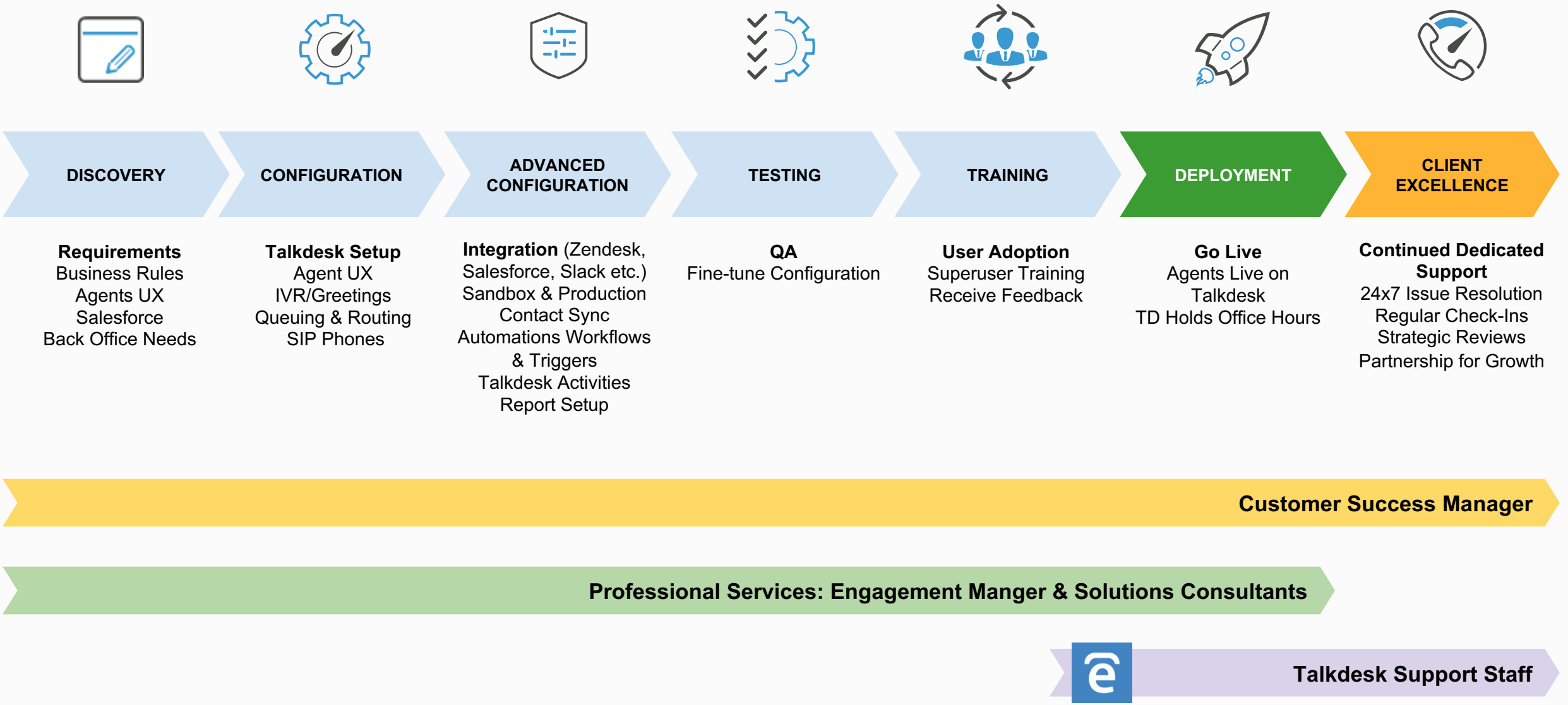
### CHALLENGES

- Replace traditional telephony solution
- Integrating with custom CRM

### TALKDESK SOLUTION





- Ease-of-use enabled teams with limited technical experience to adapt and close the gap on inefficiencies



# Implementation Flow





# Delivery Cadence

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-  Business Requirements
-  Porting LOA
-  Implementation Cheat Sheet
-  Hardware readiness



-  Communicate internally
-  Identify Super-users

-  Ensure launch readiness
-  Enable Call Forwarding



talkdesk

-  Project Plan
-  Configuration
-  Testing
-  Development

-  Training Plan
-  Training Script

-  Stakeholder sign-off

## 1. Business Profile

Your customer, our North Star

## 2. Customer Communications

Channels

Caller inquiry types

## 3. Organizational Structure and Process

Call Center and Office Setup

Tools and Applications

Volumes

Workflows

## 1. Business Requirements

Agent experience: Ease of call handling

Admin experience: Ease of Talkdesk administration

Supervisor Experience: Ease of monitoring the call center

Back Office User Experience: Ease of using Talkdesk as a telephony solution

## 2. System Requirements

Number setup: IVR and Greetings

Routing & Queuing rules

SIP for Conference rooms

Reporting requirements



1. Contact Sync between Talkdesk and CRM (Zendesk, Salesforce, etc.)
2. CRM as the the one-stop-shop  
User Management

## Talkdesk Automations

- Log calls as Zendesk tickets
- Slack messages
- Salesforce activities

## Salesforce specific

- Talkdesk Activity Object
- Talkdesk Reporting within
- Intensive testing of Managed Package installation in Sandbox before moving to  
Production

1. “Callbar” Softphone for call handling  
Outbound and Inbound  
Call from anywhere!
2. Personal extensions
  1. Voicemail
  2. Call history
  3. Email notifications

# QAT/UAT (Test Scripts, etc.)

1. Audio Quality
  - Hardware and Software
2. Call Routing
3. Reporting
  - LIVE and Historical
4. Keypad
  - Inbound and Outbound calls
  - Keypad functions: Caller ID, Transfers, Hold, Conference etc.
5. UI functions
  - Voicemail, Call History, Contact details, etc.
6. Salesforce Integration
  - Automations
  - Talkdesk Activity Object

1. Live hands-on training
2. Recorded video of the training
3. Post training practice scripts
4. Post training self-help material
5. Feedback sessions

# Training Resources



Admin



Supervisor



Agent



Back Office

Admin Configuration Guide	●			
Agent Troubleshooting Guide	●	●		
Integration Guides	●	●		
Integration Videos	●			
Video Academy	●	●	●	●
Talkdesk for Agents Guide		●	●	●
Resources website -	●	●		
Support website	●	●		

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