ibex.

Wave iX

Customer AI Project Kick Off for

mintmobile

Agenda
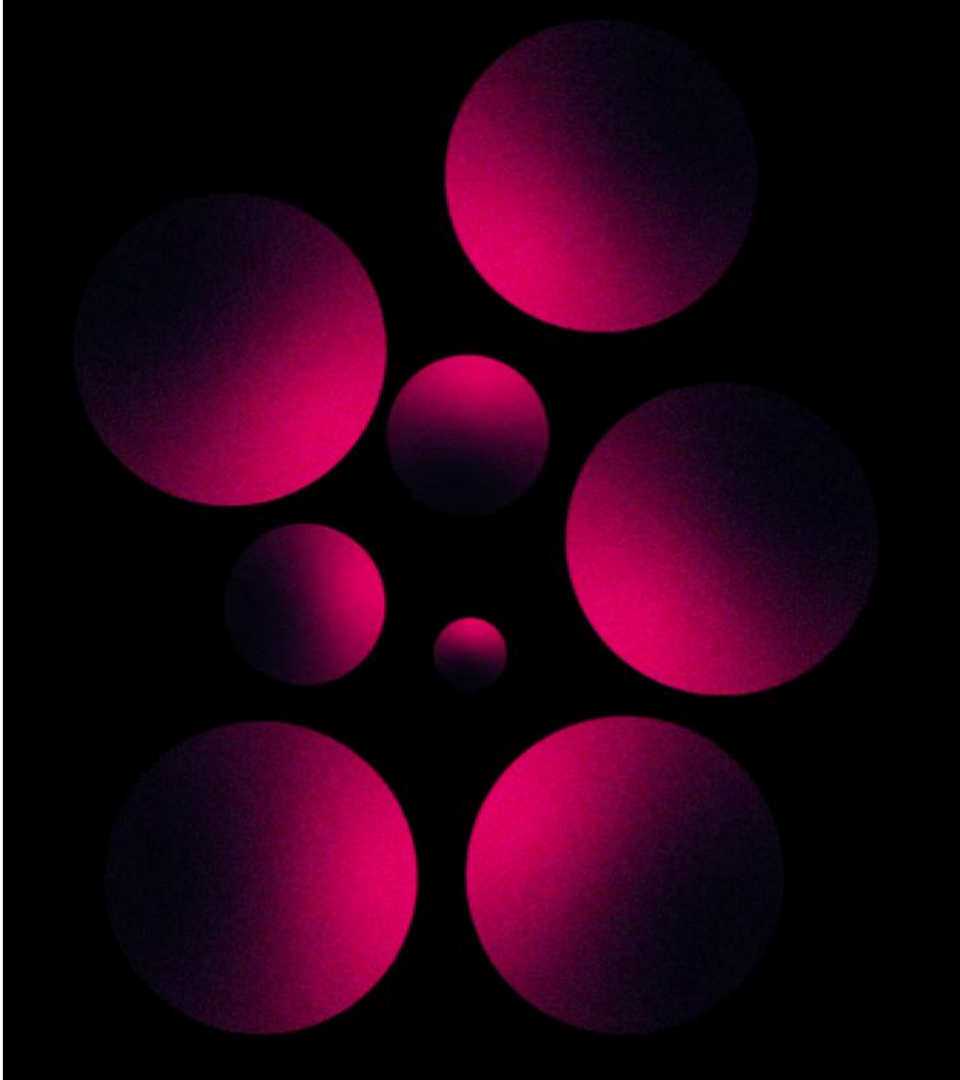
1. **Introductions**
2. **What are we implementing?**
3. **Technical overview**
4. **Customer roles and expectations**
5. **Project plan**
6. **Next steps**
7. **Wrap up and questions**

Your Wave iX Project Team

Commercial	Project	Implementation	

Kelly Kirkwood

Enterprise Account Executive

Austen Lake

Sr. Customer Success Manager
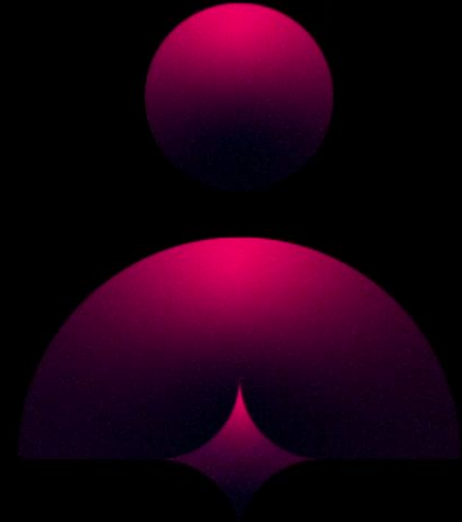
Tomas Gear
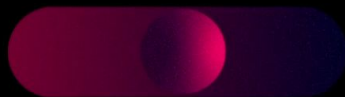
Solution Engineer

Adam Schear

CX Design Consultant

What is the AI Agent Management Platform (AMP)?

Our vision for Mint Mobile

Build an infinitely scalable fleet of AI Agents to handle authentication, account management, SIM activation, renewals, routing, and FAQs, all while driving efficiency and unlocking new revenue opportunities.

AI Agent

- ✓ available 24/7
- ✓ in dozens of languages
- ✓ empathetic and helpful — as easy as talking with a friend
- ✓ with each customer's entire history
- ✓ and all company knowledge
- ✓ at infinite scale

AI Agent Management Platform Studio

The AMP Studio lets you design and integrate highly-skilled, autonomous AI agents

AMP Studio

AI Agent Skills

Pre-trained & off-the-shelf

Routing Skill
Accurately connect callers to the right resource the first time

Knowledge Skill
Automate responses to common inquiries and questions

Additional Skills coming soon

Custom Skill
Create your own use cases: e.g. collect a CSAT survey

Custom Integration via API
Interact with company data (CRM lookup) or publicly available data (flight search)

Built with natural language briefings, not complex rules

AI Agents are guided by tasks to resolve specific issues

Connected via API to work with external systems and data

AI Agent Lifecycle Management

Lifecycle management tools quickly & reliably scale AI agents across many use cases

Design & Integrate
Define AI agent goals and constraints, and connect to existing data and systems

Simulate & Evaluate
Provide quality assurance (QA) of AI agent behavior through simulations and assessment of performance

Monitor & Improve
Track performance and refine AI agent based on real-world insights

Deploy & Scale
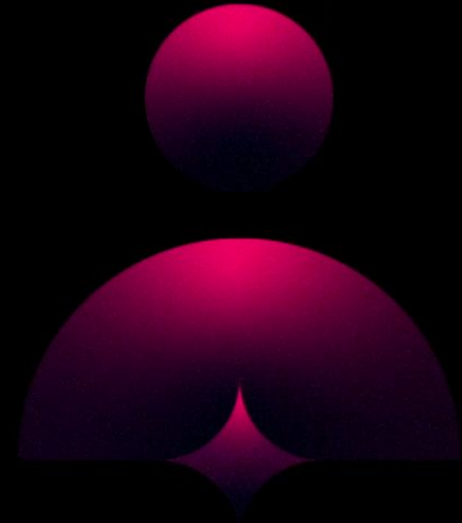Launch versioned AI agent and roll it out across customer conversations

Confirming the use cases
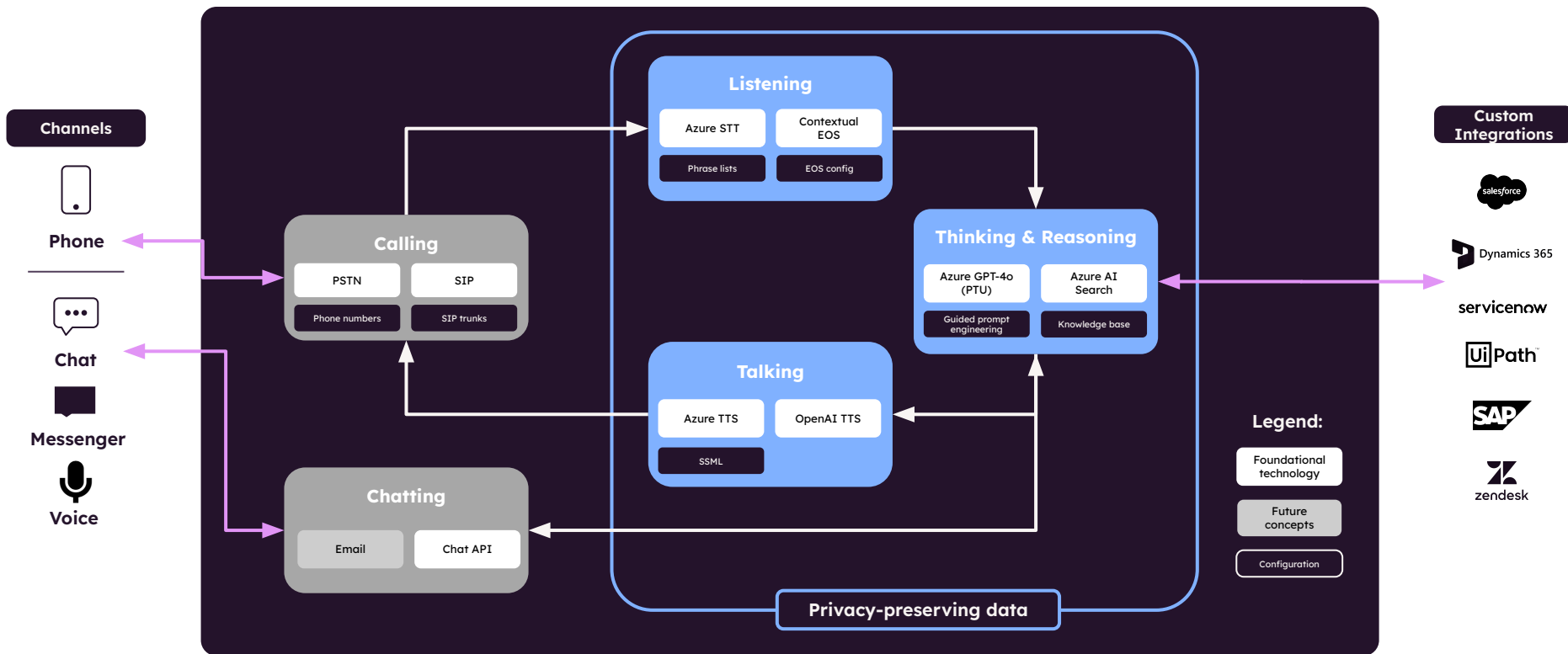
What AMP skills are we implementing for Mint Mobile?

Use Case	Description	Objectives
Routing Skill (Phase One)	Identifies caller intent and routes calls to the appropriate destination. It enables AI Agents to engage in natural conversations, ask clarifying questions, and direct callers to human agents, other AI agents, or specialized services.	
Knowledge Skill (Phase One)	Enables AI agents to answer customer queries using curated knowledge collections. This feature automates responses to frequently asked questions, reducing the workload on human agents and ensuring consistent customer interactions.	
Authentication Skill (Phase Two)	Verifies user identities via integrations via custom skills reducing the need for manual identity checks. It accelerates customer access to services while maintaining high security and privacy standards.	
Custom Skills (Phase Two)	Enables AI agents to interact with third-party systems using APIs. This allows AI agents to retrieve and send data to external systems, perform actions such as updating records or initiating transactions, and provide users with a seamless experience by integrating various backend systems into a single conversational interface.	

Technical Overview

AI Models and Data Orchestration

How Parloa enables exceptional AI agents today

Channels

Phone

Chat

Messenger

Voice

Custom Integrations

salesforce

Dynamics 365

servicenow

UiPath

SAP

zendesk

Listening

Azure STT

Contextual EOS

Phrase lists

EOS config

Calling

PSTN

SIP

Phone numbers

SIP trunks

Thinking & Reasoning

Azure GPT-4o (PTU)

Azure AI Search

Guided prompt engineering

Knowledge base

Talking

Azure TTS

OpenAI TTS

SSML

Chatting

Email

Chat API

Privacy-preserving data

Legend:

Foundational technology

Future concepts

Configuration

Confirming technical setup

What Customer technology is AMP expected to interact with?

Technology	Description	Interaction with AMP
Telephony System		
CCAS System		
Reporting tools		
Other tools		

Customer Roles & Expectations

Customer roles

What roles Customer is expected to contribute to ensure a successful go live

Roles	Description	Est. Effort Over 10 wks	Identified Contact
Project Manager	Oversees the project & tasks to be completed during the implementation, and manages internal and external stakeholders	**7 - 10h**	
Conversational Experience Designer/Bot Builder	Internal "experts" on Parloa and are tasked with co-building and supporting the AI agent	**7 - 10h**	
Solution Engineer/ Voice over IP (VoIP) Expert	Works with Parloa in the technical integration of the telephony system, the technical integration of backend systems (CRM, etc.), and API.	**6 - 12h**	
Escalation Point	Senior leader to which operational issues and opportunities can be escalated to, if necessary	**As needed**	

Success criteria

Do these standard success benchmarks meet your expectations for a successful evaluation?

Goal 1

Definition: X

Goal Metrics

Goal 2

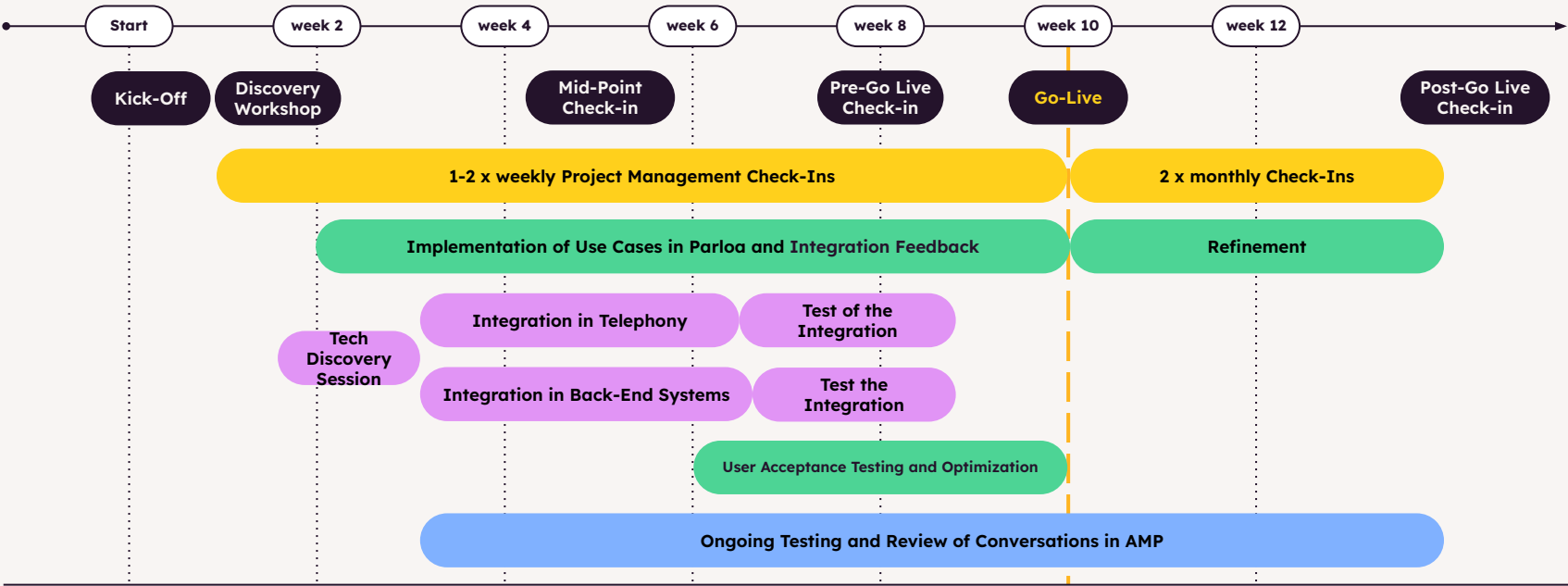**Definition:** X

Goal Metrics

Goal 3

Definition: X

Goal Metrics

Project Plan

Implementation plan overview for AI Agent Management Platform (AMP) deployments

From Kick-off to Go-Live in 10 weeks*

Timeline milestones:

Start	week 2	week 4	week 6	week 8	week 10	week 12

- Kick-Off
- Discovery Workshop
- Mid-Point Check-in
- Pre-Go Live Check-in
- Go-Live
- Post-Go Live Check-in

Activity bars:

- 1-2 x weekly Project Management Check-Ins | 2 x monthly Check-Ins
- Implementation of Use Cases in Parloa and Integration Feedback | Refinement
- Tech Discovery Session
- Integration in Telephony | Test of the Integration
- Integration in Back-End Systems | Test the Integration
- User Acceptance Testing and Optimization
- Ongoing Testing and Review of Conversations in AMP

Participation of

- ⬛ Customer (everyone involved in project), Partner, Customer, Parloa (Customer Success Manager (CSM), Conversational Experience Designer (CXD, Solution Engineering (SolEng))
- 🟨 Parloa Customer Success Manager (CSM) & Partner & Customer
- 🟩 Parloa CX Designer & Partner & Customer
- 🟪 Parloa Solution Engineer & Partner & Customer
- 🟦 Customer

*preliminary timeline

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Next Steps

1. **Parloa:** CSM to send recap email and schedule regular project check ins.
2. **Customer**: Designate project team roles, as outlined in the customer roles slide, and update the Parloa team.
3. **Parloa: Engineer to schedule technical discovery workshop with customer technical lead.**
4. **Customer: Collect materials on workflows, examples, and customization needs in preparation for a design workshop.**
5. **Parloa: Designer to schedule a workflow and content discovery workshop with customer primary design contact.**
6. **Partner:**

Wrap Up and Questions

Thank you for your time today, we're excited to get started!

Your name
Principal Customer Success Manager

youremail@parloa.com

1 (234) 567-8910

Appendix

Project team contact card

Contact details for everyone you may need to work with during implementation

Austen Lake
Sr. Customer Success Manager
austen.lake@parloa.com
1 (929) 226-0144

Your primary contact at Parloa. Leads the implementation as project manager and remains your lead advocate after go live. Collaborates with all parties to ensure successful outcomes.

Kelly Kirkwood
Enterprise Account Executive
kelly.kirkwood@parloa.com
1 (332) 240-1786

Your commercial champion who continues to work with you on anything regarding sales, upsells, new products, contracts and will assist the project team to drive the vision of Parloa.

Kristina Wagers
Sr. CX Design Consultant
kristina.wagers@parloa.com

Your design and product expert at Parloa here to support you with using our products. Leads training, discovery, customization, and the iterative improvement process.

Tomas Gear
Sr. Solutions Engineer
tomas.gear@parloa.com

Your technical contact responsible for leading technical discovery, integrations, and supporting troubleshooting. Supports customer and partner technical teams.

Enterprise Readiness

Data & Information Security

For the most up to date information see our documentation

1 **Platform**

Secure Guidelines
using best-practices to build a secure and resilient product

Pen Testing
conducted regularly as part of cybersecurity strategy by external provider

Incident Management
and Patch Management to ensure security of all systems and applications

2 **Data**

Daily Backups
Stored for 30 days. All customers' data is logically separated

Network Security
TLS 1.2 and 1.3 and other secure communication protocols
e.g. SRTP & HTTPS

Encryption
All data is encrypted in rest and transit (AES256)

3 **Organization**

ISO-27001 Certified & SOC II
meet the highest industry standard in terms of ISMS

Hosting in US
Virginia, Virginia East2 & Iowa (multiple regions to guarantee failovers)

Azure OpenAI
Best-in-class model only for customer's use, no data will be shared

LLMs Built to Comply with Data Protection and Privacy Requirements

Enhanced protection with Microsoft Azure security capabilities

Built on Microsoft Azure Cognitive Services

Azure OpenAI provides the security capabilities of Microsoft Azure while running the same models as OpenAI.

Azure OpenAI guarantees private networking, regional availability, and responsible AI content filtering.

Every interaction is isolated and data isn't shared with OpenAI.

LLMs used are provided by Azure OpenAI Service, which is fully controlled by Microsoft

Microsoft hosts the Azure OpenAI models in Microsoft's Azure environment.

The Azure Service does not interact with any services operated by OpenAI Inc.

Company data and conversations aren't used to train public LLMs.

All requests are processed in memory and are not stored by Microsoft Azure in any form.

Knowledge management data is stored in Azure and not directly exposed to the LLM.