



CX INNOVATORS AWARDS 2024

Every  
conversation  
matters.

Welcome to the fifth year of the Talkdesk [CX Innovators Awards](#), where we celebrate the organizations who turn everyday interactions into extraordinary experiences. From credit unions guiding first-time homebuyers to global retailers managing complex supply chains, these winners prove that magic happens when great people have the right tools to help other people.

Today's customer service challenges are bigger than ever, but our winners are rising to meet them. They're putting AI to work to handle routine tasks so their teams can focus on real conversations. They're making it easier for customers to get help whenever and however they need it. They're proving that even in our digital world,

authentic human connections matter more than ever. And the results speak for themselves—faster answers, smarter solutions, and customers who keep coming back.

These pages tell stories of innovation, but at their heart, they're stories about people helping people. Our CX Innovators remind us that the best customer experience isn't just about technology—it's about finding a better way—to listen, understand, and help.

Every conversation matters.

## Experience. A better way.

## Introductory remarks.

In 2024, businesses understand customer experience is an essential brand differentiator. Those who invest in building bold, memorable experiences retain more customers while attracting new ones.

The CX Innovators Awards are Talkdesk's annual celebration of brands that have unlocked innovative customer experiences with the help of technology. Today, we see Talkdesk customers being unafraid in the face of innovative technology—embracing AI, hyper-personalization, and integrations to build intuitive, secure, and thoughtful customer experiences.

The 2024 CX Innovators Awards winners and honorable mentions are the best of the best. This ebook is a collection of their stories, accomplishing reduced handle times, faster call resolutions, and increasing personalization at a rate previously unheard of. The 2024 award season recognizes some of the world's most notable brands, like Just Eat Takeaway.com, MANGO, Michaels, and World Vision Canada.

These pages showcase the stories of success amongst an increasingly challenging business landscape, where customers have more choice than ever before. Our hope is that the success of Talkdesk users serve as inspiration for you, whether you are undertaking a customer experience transformation or looking for ways to improve your existing business.

One thing is true across all the diverse stories within these pages—there is an opportunity to rid the world of bad customer experiences—and now is the time to get started.



— **CRENDAL KEAR, SENIOR VICE PRESIDENT,  
CUSTOMER SUCCESS**

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## Our esteemed judges

CX INNOVATORS AWARDS

# CX Innovator

Celebrating organizations who found innovative ways to solve contact center challenges using Talkdesk technology. Whether working with Talkdesk alone or alongside AppConnect partners and other solutions, these organizations created approaches that deliver outstanding customer experiences and show just what's possible in modern customer service.

## CX INNOVATOR WINNER



# Serving better customer care brings order to online food delivery.

Just Eat Takeaway.com (JET) operates one of the world's largest online food delivery marketplaces, providing on-demand food, grocery, and retail delivery services across North America, the United Kingdom, Europe, Australia, and Israel. As the primary touchpoint for both customers and partners, JET's contact center ensures seamless operations and consistent service quality across their expansive global ecosystem, serving millions of customers and restaurant partners daily through their integrated delivery network.



### JET's CX Vision.

JET envisions a customer experience that seamlessly supports their complex delivery network while ensuring swift issue resolution for all stakeholders. Their contact center plays a crucial role in this vision, aiming to provide consistent, high-quality service regardless of location or market. This commitment to service excellence becomes particularly vital in managing the time-sensitive nature of food delivery operations, where quick response times directly impact customer satisfaction and partner success.

### A better way to deliver service excellence.

To tackle unpredictable call volumes and fluctuating demand, JET proactively implemented Talkdesk's scalable platform, seamlessly integrating it with Zendesk and Salesforce. Deploying Talkdesk CX Cloud™ transformed JET's global operations, enabling sophisticated call routing and enhanced customer support. They utilized custom API integrations for emergency messaging and streamlined workflows, giving agents better caller context and reducing screen switching, which significantly boosted efficiency. JET also leveraged Talkdesk Knowledge Management™ to speed up agent training and Talkdesk Quality Management™ to ensure consistent service standards across markets.

JET adopted a continuous development process, starting with basic integrations and progressively adding advanced features. They meticulously mapped user journeys from both customer and agent perspectives to address real pain points and deliver tangible improvements. With the comprehensive capabilities of Talkdesk Guardian™ and Talkdesk Feedback™, JET maintained high partner satisfaction scores while managing complex operations, especially during peak periods and holidays. This agile approach allowed JET to swiftly handle immediate challenges and strategically plan for future improvements, supporting their global expansion with consistently high service quality.

JET also introduced innovative emergency response capabilities through custom API integrations, enabling them to manage critical situations across their global network. This system allowed the central team to coordinate responses to weather-related issues, technical disruptions, or other unexpected events, ensuring clear communication with both customers and delivery partners during challenging periods. As a result, JET built a more resilient delivery network that maintains service quality even under difficult circumstances.

### Impact.

- Reduced average handling time by 44% over 18 months, enhancing service efficiency.
- Decreased first response time by 45%, enabling faster issue resolution.
- Cut training time by more than two weeks, accelerating agent productivity.

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*"One of the challenges we faced was the large tool set our agents were using to accomplish different tasks. Having integrations between Talkdesk, Zendesk, and our other key systems simplifies that experience for the agent. We're reducing the need for longer after call work so we can answer the next call—because we've got 731,000 partners—and we need to be able to respond to the calls that are coming in, in real time."*

— LUKE WELLER, PRODUCT MANAGER, GLOBAL TELEPHONY TEAM,  
JUST EAT TAKEAWAY.COM

**CX INNOVATOR  
WINNER**



## Intelligent customer care makes home maintenance matter.

A part of the Wilmott Dixon Group, Fortem specializes in property solutions for social housing homes., managing over 300,000 repairs annually and enhancing 15,000 homes with energy-efficient upgrades. Since its founding in 2002, Fortem has built a reputation for creating better homes for families and careers. Every Homes Matters isn't just a slogan - it's the principle that guides their work every day. Their contact center is the vital first point of connection with the communities they serve, ensuring every engagement is handled with care and expertise.



### Fortem's CX Vision.

Fortem brings the same care and attention to their customer contact journey as they do to property maintenance. Their vision focuses on building strong rapport and delivering consistent experiences across all channels. They understand that recognizing client needs during the initial contact is crucial for successful property maintenance. This commitment to service excellence extends from the first call to the completion of every home improvement project, ensuring a seamless and satisfying customer experience.

### A better way to build customer service.

Fortem modernized its outdated contact center system by implementing Talkdesk's AI-powered platform. This upgrade brought live dashboards and real-time sentiment analysis, transforming their service delivery approach. With Talkdesk CX Cloud™, Fortem's agents now have access to advanced tools that simplify administrative tasks and enhance customer interactions. Additionally, the company uses AI-driven insights to facilitate proactive maintenance scheduling, minimizing the need for emergency repairs.

Fortem's transformation began with a comprehensive three-month migration plan, designed to maintain service continuity while the company upgraded its capabilities. Fortem's team enrolled in Talkdesk Academy, making it a standard part of onboarding for all new agents. By integrating the platform across multiple communication channels—including WhatsApp and Facebook Messenger—Fortem created a truly omnichannel customer experience, ensuring consistent service quality regardless of how customers connect.

Fortem introduced sophisticated sentiment analysis, allowing managers to evaluate the emotional tone of customer interactions in real-time. This insight enables immediate coaching opportunities and refines service delivery practices. Through AI-powered

automation, Fortem streamlined routine administrative tasks, giving agents more time to focus on meaningful customer interactions and community engagement initiatives. Customizable reporting features provide detailed insights into service patterns, helping Fortem anticipate customer needs and optimize resource allocation across operations.

### Impact.

- Improved call quality monitoring scores to 90-95%, exceeding standard KPIs.
- Significantly increased calls answered within 30 seconds through enhanced routing.
- Reduced average hold times while maintaining comprehensive service quality.

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*"We look after people's homes, we do repairs, we help improve them. Within that end-to-end journey, customer experience is absolutely critical. Whether it's that initial upfront call to help us understand the problem, or during our service, we're keeping our clients up to date on that journey through a medium that supports them."*

— CHRIS HONE, CHIEF INFORMATION OFFICER, FORTEM

CX INNOVATOR  
HONORABLE MENTION

# MANGO

## AI breaks down the language barrier at Mango.

A leading global fashion brand with over 40 years of experience, Mango delivers style and innovation to customers worldwide. Committed to “product, planet, and people,” Mango is transforming its customer service operations by bringing them in-house. They recognize the contact center as crucial for delivering exceptional customer experiences across international markets.



### Mango's CX Vision.

Mango envisions a customer experience that reflects its dedication to fashion excellence and personal service. By transitioning from outsourced operations to an internal contact center, Mango demonstrates its commitment to deeper customer connections. This strategic shift allows the company to measure and enhance customer satisfaction across all touchpoints while maintaining consistent quality globally.

### A better way to serve fashion customers in any language.

In January 2019, Mango began transforming its outsourced contact center operations into a sophisticated in-house solution. The company implemented Salesforce as its CRM foundation, followed by Tableau for analytics. The final phase introduced Talkdesk, which was selected after rigorous proof-of-concept testing.

The transformation focused on integrating generative AI into Mango's virtual agent, revolutionizing the ability to handle customer inquiries efficiently across multiple languages and regions. Using Talkdesk Feedback™, Talkdesk for Salesforce™, and the Talkdesk Conversations Mobile App™, Mango created a unified system that supports consistent service delivery while accommodating local market needs. Talkdesk's AI capabilities enable real-time language translation, ensuring clear communication with customers worldwide—regardless of an agent's spoken language. Predictive analytics help anticipate customer needs, allowing agents to provide proactive support.

Mango showcased innovation through a unique, configurable flow system that adapts to country, language, and query type. Collaborating with Talkdesk, the company developed a flexible, scalable configuration using APIs to create dynamic values for the flow, including audio URLs, call groups, and priorities. This system automatically identifies language requirements based on phone

numbers and populates data accordingly. Successful launches in Portugal, Italy, and Spain demonstrated the platform's ability to deliver personalized service at scale, with plans to expand to the United Kingdom, Germany, and Austria.

### Impact.

- Reduced average handle time by 20% through AI-powered virtual agent implementation.
- Successfully launched virtual agent services in three key European markets.
- Established foundation for expanded AI capabilities across voice channels.

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**“With Generative AI, we've noticed concrete improvements in our customer experience. Our agents now answer faster and have access to more automation. We managed to reduce the average handle time of our virtual assistant by approximately 20%, saving our customers time and stress—and improving the overall customer experience.”**

— RAMÓN ALVAREZ, HEAD OF CUSTOMER & COMMERCE BUSINESS TECHNOLOGY, MANGO

**CX INNOVATOR**  
**HONORABLE MENTION**



## Ouro closes the door on financial barriers.

Ouro is a financial services company specializing in prepaid debit cards and banking alternatives for underbanked consumers. Ouro's mission focuses on making financial services more accessible to those with limited options in the conventional banking system, providing essential services like direct deposit, mobile banking, bill pay, and cash transfers to customers who may not have access to traditional bank accounts.



### Ouro's CX Vision.

Ouro envisions transforming customer support from a cost center into a vital engine for loyalty and revenue growth. The company's vision emphasizes delivering personalized support tailored to value-conscious clientele, recognizing that their contact center serves as the nexus of customer engagement and the foundation of their retention initiatives. This strategic approach reflects Ouro's deep understanding of the unique needs of customers seeking alternative banking solutions.

### A better way to build financial freedom.

To overcome challenges with legacy systems and complex workflows, Ouro implemented Talkdesk Financial Services Experience Cloud™, revolutionizing their approach to customer support. This comprehensive solution, enhanced by Talkdesk Autopilot™, provides real-time agent assistance and deeper customer insights, enabling more empathetic and personalized interactions. By integrating Talkdesk Copilot™, Talkdesk Customer Experience Analytics™, Talkdesk CX Sensors™, Talkdesk Guardian™, and Talkdesk Knowledge Management™, Ouro created a unified CX platform that streamlines service delivery while maintaining personal connections.

The implementation roadmap adhered to a carefully phased methodology, beginning with modernizing their telephony infrastructure and progressively introducing enhanced capabilities like chat support and automated menu systems. This strategic deployment allows agents to focus on building relationships rather than navigating complex systems. Real-time guidance and customer behavior insights enable more meaningful interactions. The platform's scalability ensures that as Ouro grows, its ability to provide personalized, efficient service grows with it, supporting the mission of making financial services more accessible to underserved communities.

Ouro elevates the customer experience with conversational AI, whose adjustable tones and personas help Ouro ensure that every interaction—whether through chatbots or live agents—reflects understanding and empathy for customers' unique financial situations. This technology enables Ouro agents to provide compassionate, informed support while maintaining efficiency and compliance standards essential in financial services.

### Impact.

- Achieved faster problem resolution times across all customer interactions.
- Improved call handling efficiency while maintaining personalized service.
- Established foundation for projected gains in CSAT and NPS scores.

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**"Our transformation of customer support enables us to deliver more empathetic, efficient service while building lasting relationships with our customers seeking alternative banking solutions."**

— CHRIS CEARLEY, SENIOR DIRECTOR, CONTACT CENTER OPERATIONS,  
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CX INNOVATORS AWARDS

# AI Innovator

Celebrating companies who put Talkdesk AI to work in their contact centers, optimizing operations and improving experiences for both customers and agents. Applicants show why AI was the right choice for their business challenges, backing their decisions with solid planning and clear evidence of results.

AI INNOVATOR  
WINNER



## Collins Community Credit Union reimagines personal banking through AI-powered insights.

Collins Community Credit Union provides comprehensive financial products and services across Iowa, Wisconsin, and Illinois, managing over \$1.6 billion in assets. Founded in 1940 with the philosophy of "people helping people," Collins Community Credit Union maintains this vision while serving members through an extensive network of service channels, handling over 30,000 monthly interactions in their contact center.



### Collins Community Credit Union's CX Vision.

Collins Community Credit Union envisions a member experience that combines technological innovation with personalized service. The credit union emphasizes providing members with greater flexibility and autonomy in managing their financial needs, while ensuring expert support is always available. This commitment to service excellence drives Collins Community Credit Union's strategic implementation of AI-powered solutions that enhance both efficiency and member satisfaction.

### A better way to bring genuine connection back to banking.

To transform their member service capabilities, Collins Community Credit Union implemented Talkdesk Financial Services Experience Cloud™ and Voice IVR in a strategic two-phase rollout. The first phase revolutionized their intake process with voice biometrics, reducing identity verification from over two minutes to mere seconds. Voice IVR's AI capabilities understand member inquiries and automatically route them to appropriate departments or provide immediate self-service solutions, handling approximately 150 interactions daily.

The second phase enhanced agent capabilities through Talkdesk Autopilot™ and Talkdesk Knowledge Management™, providing real-time support and automated call summaries. Integration with their core processing system gives agents instant access to member information, while AI-generated insights help anticipate needs and proactively address issues. Through Talkdesk Customer Experience Analytics™, Collins Community Credit Union gained unprecedented visibility into interaction patterns and member sentiment, enabling data-driven decisions that have transformed service delivery.

AI-powered CX tools enable Collins Community Credit Union to maintain its commitment to personalized service while significantly improving operational efficiency. The virtual agent has successfully diverted over 50,000 calls annually through self-service options,

achieving an 89% containment rate for routine banking tasks. This strategic implementation of AI allows Collins Community Credit Union to handle higher interaction volumes without increasing staff headcount, while staying true to their philosophy of "people helping people."

### Impact.

- Reduced member wait times from 12 minutes to less than 2 minutes.
- Decreased call abandonment rates by over 50%.
- Diverted over 50,000 calls annually through self-service options.

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**"We have an Autopilot FAQ where members can call in for frequently asked questions. We've been able to utilize Talkdesk AI to build that new offering. Currently, year to date, we've seen about 30,000 interactions, which is approximately 10% of our total call volume. As a result of this success, we continue to look to enhance and grow the self-serve options we offer our members."**

— BRIAN BURTON, OPERATIONS ANALYST, COLLINS COMMUNITY CREDIT UNION

AI INNOVATOR  
HONORABLE MENTION



## When technology transforms giving into impact.

World Vision Canada is a leading global relief, development and advocacy organization that focuses on helping the world's most vulnerable girls and boys overcome poverty and experience fullness of life. With primary focus in areas of emergency relief, transformational development and the promotion of justice, their contact center serves as a crucial connection point between supporters and their global mission of creating lasting change in disadvantaged communities.



### World Vision Canada's CX Vision.

World Vision Canada envisions supporter interactions that reflect the transformative impact of their humanitarian work. They view supporters not as traditional customers but as essential partners in their mission, recognizing that each interaction strengthens the connection between donors and the communities they serve. Their vision emphasizes creating frictionless, meaningful experiences that demonstrate the direct impact of donor contributions.

### A better way to connect compassion with change.

To enhance their supporter engagement capabilities, World Vision Canada transformed their contact center operations. Following a comprehensive RFP process, they implemented Talkdesk CX Cloud™ and integrated AI to revolutionize how they connect with supporters. Through Talkdesk Copilot™ and Talkdesk Autopilot™, World Vision Canada turned routine interactions into opportunities for deeper connections.

The implementation followed a two-phase approach, first establishing core functionalities for traditional channels, then expanding to web chat, social media, and SMS. A key innovation was the development of autonomous AI capabilities, with just two employees building and managing Talkdesk Autopilot and Talkdesk Navigator™ flows without IT support. The transformation streamlined operations through cloud-based payment processing, AI-powered summaries, and voice IVR integration, enabling agents to understand supporter needs before conversations begin.

World Vision Canada's commitment to continuous improvement drives their expanding self-service options. Using Talkdesk Navigator, the organization leverages Talkdesk's comprehensive suite—including Talkdesk Workforce Management™, Talkdesk

Knowledge Management™, and Talkdesk Customer Experience Analytics™—to create an ecosystem that enhances both operational efficiency and supporter satisfaction. This ensures they can adapt quickly to evolving community needs while maximizing the impact of every contribution.

### Impact.

- Increased NPS by seven percentage points year-over-year.
- Achieved 8.6% NPS improvement following chatbot implementation.
- Reduced agent orientation time from four hours to two hours.

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**"Our AI-driven transformation has revolutionized how we engage with supporters, enabling us to create more meaningful connections that strengthen our mission of serving vulnerable communities worldwide."**

— TRIONNE PHILLIPS, DIRECTOR, OPERATIONAL EXCELLENCE, WORLD VISION CANADA

# checkr

## Checkr enhances hiring efficiency with intelligent screening.

Checkr leads the modernization of background checks and candidate screening processes, committed to helping businesses make faster and fairer hiring decisions.

Founded on the principles of speed and accuracy, Checkr differentiates itself through its mission to create more equitable work environments while maintaining rigorous compliance standards in this highly regulated industry.



### Checkr's CX Vision.

Checkr envisions a customer experience that matches the innovative spirit of its screening technology. The company's vision emphasizes creating frictionless experiences for clients while maintaining the accuracy and fairness essential to background checks. Recognizing that many support queries could be handled through self-service options, Checkr sought to transform its contact center into a more efficient, accessible resource for complex screening matters.

### A better way to open doors for every candidate.

To address challenges with maxed-out call center capacity, Checkr turned to Talkdesk's virtual agents to transform its service model. Through Talkdesk Autopilot™, the company created a sophisticated chatbot that handles routine inquiries with a conversational approach, enabling immediate assistance through self-service channels. By integrating Talkdesk Customer Experience Analytics™, Checkr gained deep insights into interactions, continuously refining support processes.

The company revolutionized its support delivery by establishing API-generated report statuses via text message, with virtual agents available to answer questions directly from status links. Supported by Talkdesk Guardian™, Talkdesk Knowledge Management™, and Talkdesk Quality Management™, Checkr maintained high service standards while significantly reducing agent workload. Within two weeks, call diversions jumped from 7% to 70%, demonstrating the platform's immediate impact on efficiency.

Using virtual agents and analytics, the company created a more scalable support environment that maintains the high accuracy standards essential to background screening while significantly improving the client experience. Checkr now anticipates client needs and proactively addresses potential issues, ensuring support remains both efficient and highly personalized.

### Impact.

- Redirected 85% of inbound queries to self-service channels.
- Achieved 85% first-contact resolution rate across 400,000 support inquiries.
- Maintained 90% success rate in virtual agent interactions.

CX INNOVATORS AWARDS

# Partnered CX Innovation

Success in customer service often comes through strong partnerships. These organizations worked with Talkdesk partners to transform their customer experience through new workflows, game-changing integrations, and expanded capabilities, showing how collaboration creates better results for everyone.

PARTNERED CX INNOVATION  
WINNER



## When smart service helps children heal faster.

Children's Hospital of Orange County (CHOC), in partnership with Chartis, stands at the forefront of pediatric healthcare. With a decade-long collaboration focused on enhancing patient care, they recognized that transforming patient access is crucial to delivering exceptional care experiences. The Patient Access Center serves as the primary gateway for families seeking care, making its modernization essential to CHOC's mission of healthcare excellence.



### CHOC and Chartis' CX Vision.

Chartis and CHOC envision a patient experience that begins with seamless access to care, setting the foundation for exceptional healthcare. Their vision emphasizes creating personalized interactions from the first point of contact, recognizing that an enhanced patient access experience directly contributes to better health outcomes. This strategic approach reflects their understanding that modern healthcare requires digital-first capabilities while maintaining the personal touch essential in pediatric care.

### A better way to help every family find care.

Following a comprehensive patient access assessment that revealed significant modernization opportunities, CHOC partnered with Chartis to implement Talkdesk Healthcare Experience Cloud™. This cloud-based platform enabled the transition from legacy systems to a modern solution supporting remote work and distributed operations. By integrating Talkdesk's advanced capabilities, CHOC created a unified system that optimizes both operational efficiency and care quality.

The transformation began with core functionalities and progressively expanded to include more sophisticated features. By integrating with Electronic Health Records (EHR), agents gained instant access to patient information, enabling more personalized service and faster support. The Customer Care and Advocacy team, previously constrained by hardwired phones, gained the mobility to serve patients while moving throughout the hospital, dramatically improving their ability to coordinate care and handle sensitive interactions.

CHOC's phased implementation ensured proper change management and allowed each new capability to be fully embedded before moving forward. The platform's advanced routing capabilities now help ensure patients reach the most appropriate resources quickly, reducing transfers and improving first-call resolution rates. Through comprehensive reporting and analytics tools, CHOC maintains visibility

into call dispositions and operational data previously unavailable, enabling data-driven decisions that continuously enhance the patient experience. This modernized system has transformed how CHOC connects with families, delivering more responsive care coordination while supporting their mission of healthcare excellence.

### Impact.

- Increased interactions per agent while maintaining staffing levels.
- Reduced average hold times and handling times across all interactions.
- Decreased cost per contact while improving operational efficiency.

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**"As one of our strategic pillars is excellence in care and service, we're looking to make it easier for patients to find what they need. Today, patients can call a single number to access support for their needs with Children's Hospital of Orange County."**

— JOHN HENDERSON, CIO, CHILDREN'S HOSPITAL OF ORANGE COUNTY

## PARTNERED CX INNOVATION HONORABLE MENTION



# Centric shows agents the complete support picture.

Centric Netherlands is a leading IT services provider, supporting diverse business divisions across Digital Business Services and Retail operations in the Netherlands, Belgium, and Lithuania. Partnering with ViPcom, Centric aimed to elevate their customer experience capabilities with a partner who deeply understands their technological requirements and organizational culture.



### Centric and ViPcom's CX Vision.

Centric and ViPcom envision customer experience as a harmonious blend of innovation, customer-centricity, and advanced technology. They leverage data and modern technologies to understand customer needs and deliver tailored solutions. Collaborating with ViPcom, Centric established a unified contact center infrastructure to support their commitment to service excellence while driving operational efficiency.

### A better way to bring clarity to service.

To transform their customer service capabilities, Centric, guided by ViPcom, implemented Talkdesk CX Cloud™, fundamentally changing how they support clients across regions. This comprehensive solution enabled sophisticated call routing and enhanced pre-screening capabilities through deep integration with ServiceNow, creating a single pane of glass for agents to access customer data and service requirements. By integrating Talkdesk Copilot™, Talkdesk Knowledge Management™, and Talkdesk Guardian™, Centric established a foundation for AI-driven support that enhances agent performance while maintaining service quality. Through intelligent routing and AI autopilot, Centric connects customers with the most appropriate agents based on query type and historical interaction patterns.

The platform's advanced reporting and analytics capabilities provide real-time insights into operational performance and customer satisfaction trends, enabling proactive improvements. By combining AI-driven functionalities with ServiceNow workflow management tools, Centric optimizes task assignment and management across their service organization. This technology foundation positions Centric to expand their service capabilities through video calling, co-browsing, and transcript language translation for their international service desks, ensuring they stay ahead of market demands while maintaining exceptional service standards. Centric's implementation strategy

focuses on continuous innovation, with plans to leverage additional AI capabilities to further enhance both agent and customer experiences across all interaction channels.

### Impact.

- Achieved significant reductions in customer wait times through improved routing.
- Increased agent productivity through automated routine tasks.
- Streamlined onboarding costs through proactive information sharing.

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**"Our partnership with ViPcom and Talkdesk's solutions has transformed how we deliver IT services, enabling us to provide more responsive, efficient support while maintaining our commitment to innovation."**

— SANDER BERNARDUS, LEADER WORKSPACE MANAGEMENT & SUPPORT, CENTRIC

CX INNOVATORS AWARDS

# CX Rookie of the Year

In their first year with Talkdesk, these organizations hit the ground running. They achieved excellence through rapid deployment and quick returns on their investment, showing how the right technology—even without AI—can transform customer service fast.

CX ROOKIE OF THE YEAR  
WINNER

TEKA



## When expert support comes home.

Teka Group is a pioneering force in home appliances, evolving from its 1924 origins as a German agricultural machinery company to now serving over 100 million households worldwide. With products in 50% of Spanish homes, Teka has built its reputation on manufacturing quality appliances that enable meaningful moments for families, supported by their commitment to exceptional customer service at every touchpoint.

### Teka Group's CX Vision.

Teka envisions a customer experience that prioritizes the end consumer through both pre-sale guidance and comprehensive after-sale support. They create seamless interactions that enhance the ownership experience of their appliances, recognizing that customer satisfaction depends heavily on the quality of information and support their agents provide. This commitment to service excellence extends from initial product inquiries through the entire lifecycle of their appliances.

### A better way to keep homes running smoothly.

To enhance control over service quality and improve operational efficiency, Teka transformed their fragmented contact center operations with Talkdesk CX Cloud™. This strategic consolidation unified three separate centers—two external and one internal—into a cohesive operation with complete visibility into agent performance and service levels. Through innovative features like video calls, agents can now visually diagnose issues and provide immediate solutions without dispatching technicians, creating a more efficient and satisfying customer experience.

The implementation, completed in just four months, introduced a sophisticated multi-channel approach including voice, video, WhatsApp, and SMS capabilities. Integration with their CRM system enables agents to instantly access customer information when answering calls, while automated SMS notifications keep customers informed of service status through repair order updates. Through Talkdesk Autopilot™ and Talkdesk Navigator™, agents gained access to streamlined workflows that enhance productivity, supported by real-time performance insights through personalized dashboards.

By using this comprehensive technology foundation, Teka maintains high service standards while significantly reducing operational costs. The transformation enables them to distribute agents according to workload, introduce automation to simplify tasks, and provide innovative support options like video diagnostics that speed resolution times while reducing the need for home visits.

### Impact.

- Achieved a 4.7 out of 5 customer satisfaction score through enhanced service delivery.
- Reduced operational costs with a 25% headcount reduction while improving efficiency.
- Decreased technician visits by 10% through video call implementation.

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**"With a virtual agent, our customers now have the ability to open a repair order 24/7. They can use the virtual agent and access a lot of information, even outside of the business hours of our customer service team. This has been the biggest benefit of our contact center transformation."**

— ESTHER RIGLOS, VP GLOBAL HEAD CUSTOMER SERVICE, TEKA GROUP

CX ROOKIE OF THE YEAR  
HONORABLE MENTION



## When retirement planning meets personal service.

Nassau Financial Group is a digitally enabled financial services provider, managing \$24.3 billion in assets with \$1.5 billion in adjusted capital. Founded in 2015, they have established themselves as an innovative force in the insurance industry, moving customers closer to their retirement goals through personalized service and strategic solutions.



### Nassau Financial Group's CX Vision.

At Nassau, customer satisfaction is paramount. Nassau designed a customer experience that minimizes wait times while maximizing personalization in every interaction. They deliver seamless support to help customers achieve their retirement objectives, recognizing each interaction as an opportunity to demonstrate their commitment to customer success. This approach reflects their dedication to continuous learning and optimization in service delivery.

### A better way to secure financial futures.

To enhance their customer service capabilities, Nassau implemented Talkdesk Financial Services Experience Cloud™, transforming how they engage with clients across multiple departments including call center, new business, underwriting, and elite classified agents. Through sophisticated pre-screening and routing capabilities, they created a system that identifies caller intent and connects customers with the most appropriate department, while providing agents instant access to caller verification and policy information.

The implementation introduced innovative features aligned with their unique business needs. A dynamic module synchronized with the New York Stock Exchange calendar ensures accurate business hours and availability updates across departments. The platform's integration with their enterprise data warehouse enables personalized service delivery, while separate testing environments prevent any disruption to the customer experience. With Talkdesk Autopilot™ and machine learning technology, Nassau strengthened their routing accuracy while reducing administrative time.

Talkdesk Financial Services Experience Cloud enables Nassau to expand into new communication channels and self-service options, ensuring CX teams can meet evolving customer preferences while maintaining their commitment to personalized service.

The transformation enables Nassau to deliver efficient, knowledgeable support that helps clients navigate their path to retirement with confidence.

### Impact.

- Reduced transfer rates by 4.5% through optimized call routing.
- Decreased average talk time by 90 seconds while maintaining service quality.
- Achieved exceptional Trustpilot rating of 4.9 out of 5.0.

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**"This can be reflected in our call center with our seamless customer experience, where we minimize the amount of time a caller waits on a phone line before being answered. With Talkdesk, we are continuing to enhance accurate call routing and will develop self-service options, creating a quicker and more efficient delivery of quality service."**

— JARED SELAGE, TECHNICAL LEAD - SERVICE DELIVERY, NASSAU FINANCIAL GROUP

CX INNOVATORS AWARDS

# AI Rookie of the Year

These first-year Talkdesk customers embraced AI solutions from the start, achieving excellence through rapid deployment and quick results. Their success shows how starting smart with AI can deliver immediate value in customer service.

AI ROOKIE OF THE YEAR  
WINNER



## Metro Finance turns stress into solutions.

Metro Finance provides reliable commercial finance lending solutions to small and mid-sized businesses across Australia. A team of 30 customer service agents manages essential functions including collections, losses, recovery, hardship, and financial assistance. With a portfolio that expanded 20% in the past year, their contact center serves as the primary touchpoint for all customer relationships, handling inquiries from basic financial statements to complex hardship support.



### Metro Finance's CX Vision.

Metro Finance aims to simplify customer engagement by eliminating unnecessary touchpoints in their service delivery. Their strategy focuses on transforming traditional multi-agent routing into a streamlined experience that connects customers directly with specialized support. This approach aligns with their commitment to operational efficiency and responsive customer service.

### A better way to help customers clear financial hurdles.

Metro Finance's legacy contact center faced significant challenges, including inflexible workflows and costly updates. Basic IVR changes took weeks and could cost up to \$45,000, while activating disaster response protocols required 6-8 weeks.

To modernize their contact center operations, Metro Finance implemented Talkdesk Financial Services Experience Cloud™, featuring AI-powered automation. This included Talkdesk Autopilot™ for intelligent call deflection and personalized IVR responses, as well as AI-driven analytics for real-time performance monitoring. The platform's intuitive interface allowed for quick system modifications and eliminated hardware dependencies, enabling agents to work efficiently through web or mobile applications.

The transition brought several innovations to Metro Finance. The AI foundation continuously analyzes call records, enabling immediate response improvements and predictive service adjustments. Automated call summarization and reporting eliminated manual administrative tasks, allowing agents to focus entirely on customer interactions. Personalized IVR responses, trained using archived conversations from top-performing agents, significantly improved customer engagement.

Supervisors gained real-time visibility into customer satisfaction metrics and agent performance through Talkdesk's KPI dashboards, enabling data-driven service optimization. The integration of automated two-factor authentication streamlined customer verification processes, reducing time spent on identity validation and increasing the time available for addressing customer needs.

### Impact.

- Cut operating costs 40% while growing portfolio 20%.
- Reduced IVR updates from one week to two minutes.
- Accelerated disaster response from 6 weeks to same day communication.

# Credit Union 1



## Credit Union 1 powers up member conversations.

Credit Union 1 delivers member-focused financial services with a commitment to personalized, seamless support across its operations. The company's transition from multiple, disparate AI platforms to a unified solution demonstrates its dedication to continuous service improvement and operational excellence, recognizing that every member interaction presents an opportunity for enhanced engagement.

### Credit Union 1's CX Vision.

Credit Union 1 aims to combine personalized service with efficient, responsive support. The focus is on meeting members where they are while maintaining consistent service quality as the organization grows. By consolidating multiple AI platforms into a single, unified system, the company creates more cohesive and accurate member interactions across all service channels.

### A better way to cut costs and boost satisfaction.

To transform member service capabilities, Credit Union 1 implemented Talkdesk Financial Services Experience Cloud™, replacing a fragmented array of vendors with a comprehensive unified platform. This strategic consolidation eliminated the challenges of managing multiple knowledge bases, creating a single source of truth for all AI functionalities. Through an enhanced AI chatbot named Luna, the company achieved a 70% containment rate for routine inquiries, while AI-powered agent guidance provides team members with immediate access to essential information.

The transformation dramatically expanded quality assurance capabilities, enabling analysis of 100% of member interactions compared to the previous 2% sampling. Through predictive analytics, Credit Union 1 optimizes resource allocation during peak periods, particularly valuable given its aggressive merger and acquisition strategy. The platform's sophisticated post-call analytics and unified knowledge base empower agents to handle complex cases more effectively while reducing time spent on repetitive inquiries.

By streamlining authentication processes and enhancing self-service options, Credit Union 1 created a more efficient, satisfying member experience while significantly reducing operational costs. The unified platform's comprehensive capabilities position the organization to scale services efficiently while maintaining its commitment to personalized member care.

### Impact.

- Achieved 70% containment rate through AI chatbot implementation.
- Increased CSAT scores from 73 to 86 in nine months.
- Projected monthly savings of \$30,000 through reduced call durations.

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**"Our implementation of Talkdesk's unified AI solution has transformed how we serve our members, enabling us to provide more efficient, personalized support while significantly reducing operational costs."**

— GARRETT JOREWICZ, SVP OF MEMBER EXPERIENCE, CREDIT UNION 1

## AI ROOKIE OF THE YEAR HONORABLE MENTION



# Evara Health gives medical staff more time to care.

Evara Health provides essential healthcare services to underserved communities, offering comprehensive care from family medicine to specialty services like dental and behavioral health. Their contact center connects patients with family medicine, pediatrics, women's health, and specialty services, functioning as the primary gateway for healthcare access. The center focuses on delivering compassionate, patient-centered support that removes barriers to quality healthcare services.



### Evara Health's CX Vision.

Evara Health aims to demonstrate compassion and build lasting relationships with patients while ensuring effortless access to healthcare services. Their vision centers on creating a support system that efficiently connects patients to needed services while maintaining personalized, family-like relationships. This approach aligns with their mission to innovate beyond traditional healthcare barriers.

### A better way to put patients first.

The pandemic exposed limitations in Evara's legacy on-premises contact center, which struggled to support remote work and lacked intuitive routing capabilities. Manual administrative tasks consumed agent time, while poor routing extended patient wait times for essential healthcare services. Evara implemented Talkdesk Healthcare Experience Cloud™ to transform their patient support operations. The solution integrated directly with Epic, their Electronic Health Record system, enabling seamless access to patient information and automated routing to appropriate care teams.

The implementation followed two strategic phases, beginning with Epic integration to improve prescreening and routing sequences. This initial phase significantly reduced patient wait times by connecting them more quickly with appropriate care teams. The second phase introduced AI-powered self-service options through Talkdesk Autopilot™, enabling patients to manage appointments independently. Talkdesk Copilot™ enhanced agent capabilities by listening to conversations and automatically surfacing relevant knowledge base articles based on discussion context, eliminating manual searches and improving response accuracy.

By automating routine tasks, Evara agents can focus on delivering personalized care and conducting proactive outreach to patients with complex medical needs. This transformation enables agents to maintain longer, more supportive conversations while ensuring consistent handle times, demonstrating improved interaction quality without sacrificing efficiency.

### Impact.

- Reduced inbound call volume handled by live agents by 45% through AI automation.
- Recovered 30-40 canceled appointments daily.
- Maintained consistent handle times while improving interaction quality.

• • •

**"When patients can self-serve their issues through AI, it enables better service for them while delivering greater value back to our organization. We are eager to expand the use of that AI to become even more efficient in our mission to care for and serve our community."**

— BEN GILBERT, CHIEF FINANCIAL OFFICER, EVARA HEALTH

CX INNOVATORS AWARDS

# CX Transformation

Celebrating organizations who turned digital transformation into a strategic advantage, reshaping customer service without AI solutions. From moving contact centers to the cloud, to equipping agents with best-in-class remote tools and creating digital-first customer channels, they demonstrate how thoughtful transformation drives service excellence and measurable growth.

## CX TRANSFORMATION WINNER



# Feeding support that never sleeps.

Medela delivers essential healthcare solutions to over 6 million hospitals and homes across 100 countries. With more than 1,500 employees worldwide and 20 subsidiaries spanning Europe, the Americas, and Asia, Medela provides research-based breast milk feeding products, healthcare solutions, and clinical education. Their contact center serves as a critical connection point for mothers, babies, patients, and healthcare professionals globally.



### Medela's CX Vision.

Medela aims to unify global contact center operations while capturing the complete customer journey across all touchpoints. Their strategy focuses on implementing a cost-effective cloud solution for seamless customer engagement across regions and time zones. This approach aligns with their core value of putting customers first and their commitment to improving healthcare outcomes worldwide.

### A better way to elevate customer experience.

Medela faced challenges in providing 24/7 global support and maintaining consistent service quality across regions. Their legacy system lacked integration capabilities with essential business tools and couldn't provide comprehensive customer insights. Beginning in December 2022, Medela implemented Talkdesk CX Cloud™ in a phased rollout, starting with US operations before expanding to Switzerland, Germany, and Canada.

The transformation revolutionized their global operations through seamless system integration. Talkdesk's connection with their Salesforce CRM and SAP infrastructure provided agents instant access to customer information, eliminating service delays. Quality management and screen recording capabilities enabled supervisors to provide immediate coaching based on real performance data. Through comprehensive survey tools and voice-to-text feedback mechanisms, Medela gained new channels for customer input, while workforce management features improved scheduling efficiency across time zones.

The integrated Talkdesk technology foundation unified Medela's customer support across their global network while maintaining the personal touch essential in healthcare. By consolidating customer data from multiple systems into a single interface, agents can now deliver more personalized service without waiting to track down information.

The implementation of sophisticated IVR systems and feedback tools ensures that Medela can continue supporting families and healthcare providers with the highest quality of care.

### Impact.

- Unified support across 20 global subsidiaries.
- Enhanced service quality through real-time feedback.
- Improved agent performance via data-driven coaching.

• • •

**"Everything integrates so smoothly. Our customers do not need to wait for agents to track down additional information to resolve their issues or answer their questions. Our agents are also able to provide more personalized service to our customers."**

— JOCELYN ANG, SENIOR MANAGER FOR NETWORK SERVICES, MEDELA

CX INNOVATORS AWARDS

# AI-Powered CX Transformation

This award celebrates organizations who put AI at the heart of their transformation strategy, creating powerful new ways to serve customers. From AI-powered omnichannel experiences to agent assistance tools and intelligent self-service, they demonstrate how strategic AI adoption drives service excellence and measurable business growth.



## BCLC deals a winning AI strategy to support player success.

The British Columbia Lottery Corporation (BCLC) conducts and manages gaming operations throughout British Columbia, generating revenue to fund essential healthcare, education, and community programs. The organization's contact center supports players across the province, ensuring responsible gaming practices and delivering responsive customer service. BCLC's commitment to social impact makes its customer support operations integral to both player satisfaction and community benefit.

### BCLC's CX Vision.

BCLC aims to create a predictive customer experience to address player needs before they arise. Their strategy focuses on delivering personalized, omnichannel support to enhance the gaming experience and strengthen player relationships. This approach aligns with their mission to generate social value through responsible gaming operations.

### A better way to nourish every moment.

BCLC's legacy system was inflexible, requiring costly analyst support and weeks of implementation for each modification. After seeing immediate results in an initial trial, BCLC implemented Talkdesk CX Cloud™, quickly moving from pilot to full deployment. Their solution integrated seamlessly with the Salesforce platform and AWS Polly APIs, creating a unified support ecosystem that transformed their ability to serve players effectively.

The Talkdesk implementation revolutionized BCLC's operations through AI-powered capabilities. The solution proactively identifies and remedies potential issues before they affect players, creating a more concierge-like approach to customer support. This predictive capability enables agents to address concerns more efficiently while maintaining BCLC's commitment to responsible gaming.

With AI handling administrative tasks and call summaries, BCLC agents can now focus entirely on player interactions. Supervisors utilize a centralized dashboard to monitor performance metrics and provide targeted coaching, while customer sentiment data directly informs strategic business decisions. The introduction of chatbot functionality has helped BCLC to successfully shift 30% of routine inquiries away from the contact center, allowing agents to dedicate more time to complex player needs.

### Impact.

- Cut average handle time by 60 seconds.
- Reduced hold times to 25 seconds.
- Decreased call abandonment to 12%.

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**"Talkdesk provides real-time data in one centralized dashboard. Now, the work of our call center agents is directly used to inform strategic business decisions that influence the future direction of BCLC."**

— MARTIN LAMPMAN, DIRECTOR CUSTOMER SUPPORT OPERATIONS, BCLC



## Municipal Credit Union delivers first responders fast financial answers.

Municipal Credit Union (MCU) provides financial services to more than 600,000 members across New York, with a special focus on first responders and frontline workers. Their contact center manages essential member interactions, from routine transactions to complex financial guidance. As a member-owned institution serving New York's everyday heroes since 1916, MCU's commitment to service excellence makes its contact center operations critical to member satisfaction and credit union growth.



### MCU's CX Vision.

MCU aims to create personalized, efficient experiences that honor its legacy of serving New York's essential workers. Their strategy focuses on empowering agents with advanced technology to provide first-contact resolution and reduce friction in member interactions. This vision aligns with their mission to deliver value-added experiences while maintaining their commitment to putting members before profits.

### A better way to support those who serve.

MCU's previous contact center model created significant operational challenges, with managers spending 75% of their time responding to agent chat inquiries rather than leading their teams. The inefficient structure resulted in frequent call transfers and limited first-contact resolution capabilities. MCU implemented Talkdesk Financial Services Experience Cloud™ to transform its member service operations. The solution integrated AI capabilities to streamline call handling and increase response capacity while maintaining personalized service.

Through Talkdesk's AI-powered tools, relevant information from the MCU knowledge base now automatically surfaces during member interactions, eliminating the need for agents to seek manager assistance. A sophisticated Voice of Member program gathers direct feedback after resolution, while Talkdesk Interaction Analytics™ tracks conversation flow and sentiment to guide continuous improvement. The system's centralized hub enables seamless collaboration between contact center and retail branch staff, ensuring consistent service across all channels.

By automating routine tasks and providing instant access to member information, MCU agents can focus on delivering personalized financial guidance. The implementation of virtual agent capabilities has established efficient self-service options while maintaining high containment rates, allowing the team to dedicate more time to complex member needs while significantly reducing operational costs.

### Impact.

- Reduced average wait times from 18 to 5 minutes.
- Achieved 64% virtual agent containment.
- Generated \$1 million in projected savings.

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*"Today, we're proactively asking members to complete our survey after an agent resolves their issue. Our goal is to gather direct member feedback on the customer experience and share the sentiment from those survey results with our agents so they can continuously improve their interactions over the phone."*

— STUART SALEMPIER, VP OF MEMBER EXPERIENCE,  
MUNICIPAL CREDIT UNION

## AI-POWERED CX TRANSFORMATION HONORABLE MENTION



# Memorial Healthcare System helps at the first hello.

Memorial Healthcare System delivers high-quality healthcare services across South Florida through multiple hospitals and healthcare centers. As one of the largest public healthcare systems in the nation, Memorial's contact center serves as a critical connection point for patient care, handling everything from appointment scheduling to symptom discussions. Their reputation for exceptional patient and family-centered care makes communication effectiveness essential to healthcare delivery.

### Memorial Healthcare System's CX Vision.

Memorial aims to create consistent, personalized patient experiences across all facilities while developing more proactive engagement strategies. Their vision focuses on transforming fragmented contact centers into a unified system that leverages data analytics for personalized care. This approach aligns with their mission to advance healthcare access and quality for their community.

### A better way to understand every patient's story.

Memorial faced significant challenges with disconnected contact centers that created inconsistent patient experiences and information gaps between facilities. The fragmented system forced patients to repeatedly provide information and prevented standardized care delivery across locations. Memorial implemented Talkdesk Healthcare Experience Cloud™ with direct Epic EHR integration to transform patient communications. The solution embedded Talkdesk Autopilot™ within Epic Cheers CRM, enabling seamless data flow between patient interactions and medical records.

Talkdesk Autopilot analyzes conversations in real-time, identifying mentioned symptoms and health concerns that might otherwise be overlooked. For instance, if a patient calls about x-ray results but mentions recurring headaches, the system captures these details for proactive follow-up care. The AI provides agents with intelligent guidance during calls, automatically surfacing relevant medical information based on patient symptoms and history. This centralized approach ensures that all healthcare providers across Memorial's network have immediate access to complete patient interaction histories, eliminating the need to repeat information.

By automatically logging and summarizing patient conversations directly in Epic, Memorial significantly improves its ability to deliver personalized care while reducing operational inefficiencies. This system enables more informed healthcare decisions and

proactive patient outreach. Memorial's comprehensive approach to patient communication has not only enhanced service quality but also helped reduce unnecessary emergency room visits by providing clearer guidance and follow-up care.

### Impact.

- Reduced call abandonment from 20% to 2.5%.
- Increased service levels by 30%.
- Decreased emergency room walk-ins.

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**"Now that our systems are fully integrated, we have more accurate data about our patients' interactions with Memorial—whether it's in person or on the phone, we have a full view of a patient's journey within our health system. This has vastly improved our patient experience."**

— JEFFREY STURMAN, CHIEF DIGITAL INFORMATION OFFICER AND SVP, MEMORIAL HEALTHCARE SYSTEM

CX INNOVATORS AWARDS

# CX Efficiency Leader

This award recognizes organizations who transformed their contact center operations through smart, practical solutions. From self-service options and enhanced workforce management to streamlined agent tools, they show how strategic improvements drive both operational efficiency and better customer experiences –with metrics that prove the impact.

CX EFFICIENCY LEADER  
WINNER



## Evara Health gives medical staff more time to care.

Evara Health provides essential healthcare services to underserved communities, offering comprehensive care from family medicine to specialty services like dental and behavioral health. Their contact center connects patients with family medicine, pediatrics, women's health, and specialty services, functioning as the primary gateway for healthcare access. The center focuses on delivering compassionate, patient-centered support that removes barriers to quality healthcare services.



### Evara Health's CX Vision.

Evara Health aims to demonstrate compassion and build lasting relationships with patients while ensuring effortless access to healthcare services. Their vision centers on creating a support system that efficiently connects patients to needed services while maintaining personalized, family-like relationships. This approach aligns with their mission to innovate beyond traditional healthcare barriers.

### A better way to put patients first.

The pandemic exposed limitations in Evara's legacy on-premises contact center, which struggled to support remote work and lacked intuitive routing capabilities. Manual administrative tasks consumed agent time, while poor routing extended patient wait times for essential healthcare services. Evara implemented Talkdesk Healthcare Experience Cloud™ to transform their patient support operations. The solution integrated directly with Epic, their Electronic Health Record system, enabling seamless access to patient information and automated routing to appropriate care teams.

The implementation followed two strategic phases, beginning with Epic integration to improve prescreening and routing sequences. This initial phase significantly reduced patient wait times by connecting them more quickly with appropriate care teams. The second phase introduced AI-powered self-service options through Talkdesk Autopilot™, enabling patients to manage appointments independently. Talkdesk Copilot™ enhanced agent capabilities by listening to conversations and automatically surfacing relevant knowledge base articles based on discussion context, eliminating manual searches and improving response accuracy.

By automating routine tasks, Evara agents can focus on delivering personalized care and conducting proactive outreach to patients with complex medical needs. This transformation enables agents to maintain longer, more supportive conversations while ensuring consistent handle times, demonstrating improved interaction quality without sacrificing efficiency.

### Impact.

- Reduced inbound call volume handled by live agents by 45% through AI automation.
- Recovered 30-40 cancelled appointments daily.
- Maintained consistent handle times while improving interaction quality.

• • •

**"When patients can self-serve their issues through AI, it enables better service for them while delivering greater value back to our organization. We are eager to expand the use of that AI to become even more efficient in our mission to care for and serve our community."**

— BEN GILBERT, CHIEF FINANCIAL OFFICER, EVARA HEALTH



## Collins Community Credit Union reimagines personal banking through AI-powered insights.

Collins Community Credit Union provides comprehensive financial products and services across Iowa, Wisconsin, and Illinois, managing over \$1.6 billion in assets. Founded in 1940 with the philosophy of "people helping people," Collins Community Credit Union maintains this vision while serving members through an extensive network of service channels, handling over 30,000 monthly interactions in their contact center.



### Collins Community Credit Union's CX Vision.

Collins Community Credit Union envisions a member experience that combines technological innovation with personalized service. The credit union emphasizes providing members with greater flexibility and autonomy in managing their financial needs, while ensuring expert support is always available. This commitment to service excellence drives Collins Community Credit Union's strategic implementation of AI-powered solutions that enhance both efficiency and member satisfaction.

### A better way to bring genuine connection back to banking.

To transform their member service capabilities, Collins Community Credit Union implemented Talkdesk Financial Services Experience Cloud™ and Voice IVR in a strategic two-phase rollout. The first phase revolutionized their intake process with voice biometrics, reducing identity verification from over two minutes to mere seconds. Voice IVR's AI capabilities understand member inquiries and automatically route them to appropriate departments or provide immediate self-service solutions, handling approximately 150 interactions daily.

The second phase enhanced agent capabilities through Talkdesk Autopilot™ and Talkdesk Knowledge Management™, providing real-time support and automated call summaries. Integration with their core processing system gives agents instant access to member information, while AI-generated insights help anticipate needs and proactively address issues. Through Talkdesk Customer Experience Analytics™, Collins Community Credit Union gained unprecedented visibility into interaction patterns and member sentiment, enabling data-driven decisions that have transformed service delivery.

AI-powered CX tools enable Collins Community Credit Union to maintain its commitment to personalized service while significantly improving operational efficiency. The virtual agent has successfully diverted over 50,000 calls annually through self-service options,

achieving an 89% containment rate for routine banking tasks. This strategic implementation of AI allows Collins Community Credit Union to handle higher interaction volumes without increasing staff headcount, while staying true to their philosophy of "people helping people."

### Impact.

- Reduced member wait times from 12 minutes to less than 2 minutes.
- Decreased call abandonment rates by over 50%.
- Diverted over 50,000 calls annually through self-service options.

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**"We have an Autopilot FAQ where members can call in for frequently asked questions. We've been able to utilize Talkdesk AI to build that new offering. Currently, year to date, we've seen about 30,000 interactions, which is approximately 10% of our total call volume. As a result of this success, we continue to look to enhance and grow the self-serve options we offer our members."**

— BRIAN BURTON, OPERATIONS ANALYST, COLLINS COMMUNITY CREDIT UNION



## Michaels fuels creativity at the speed of inspiration.

Michaels operates over 1,300 creative supplies retail stores across North America, serving customers in 49 states and Canada. Their contact center manages essential customer interactions, from product inquiries to creative project support, functioning as the primary connection point between the brand and its customers. Since 1973, Michaels has maintained its position as North America's leading creative supplies retailer, with a mission to fuel the joy of creativity.



### Michaels' CX Vision.

Michaels aims to deliver seamless, personalized experiences that inspire and enable customer creativity. Their strategy focuses on transforming customer support from a transactional service into an efficient, informative resource that empowers creative pursuits. This vision aligns with their commitment to customer satisfaction and creative enablement.

### A better way to meet customers where they are.

Michaels faced significant operational challenges in their contact center, with after-call work taking 5-7 minutes per interaction and new agent training requiring up to 90 days. Their knowledge management system created barriers to quick information access, while seasonal fluctuations strained resources. Michaels implemented Talkdesk Retail Experience Cloud™ to transform their operations. The phased implementation began in 2018, introducing real-time assistance tools and advanced analytics capabilities.

The transformation introduced AI-powered tools for automatic interaction summaries and next-step suggestions, reducing administrative time to under one minute per call. Advanced analytics enabled the team to identify service improvement opportunities while quality management tools accelerated agent development through targeted coaching. The system's knowledge management capabilities provide instant access to information during customer interactions, improving response accuracy and enabling consistent service levels even during peak periods. Through intelligent resource allocation, Michaels optimized their team structure while enhancing overall service quality.

The initiative also introduced sophisticated workforce management capabilities that proved transformative during seasonal peaks—a critical challenge for retail operations. By leveraging AI-powered analytics, Michaels gained the ability

to predict staffing needs with greater accuracy, ensuring optimal coverage during high-volume periods like holiday seasons and promotional events. This predictive capability, combined with the streamlined training process and enhanced knowledge management system, enabled the team to maintain consistent service levels even during the most demanding retail periods. The system's ability to identify patterns in customer inquiries also allowed for proactive resource allocation, ensuring that specialized knowledge was available when customers needed it most.

### Impact.

- Increased service levels from 20% to 89%.
- Cut after-call work from 7 minutes to 60 seconds.
- Reduced team size by 35% while improving service.

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**"Our efficiency improvements have significantly enhanced the customer experience. We've reduced the need for customers to repeat information, as agents can quickly access interaction summaries. Issue resolution is faster due to improved agent access to relevant information."**

— KRISTAL ROLOFF, DIRECTOR, CX STORE EXPERIENCE, MICHAELS

CX INNOVATORS AWARDS

# CX Revenue Growth Leader

This award celebrates organizations that transformed customer service into a growth engine. By uncovering insights from customer interactions, they created new revenue opportunities through strategic upsell and cross-sell programs. Their results prove how smart customer experience strategies directly drive business growth and customer lifetime value.



## TireHub steers tire distribution through relationship-focused service innovation.

TireHub delivers essential tire distribution services across North America, combining local expertise with centralized support capabilities. Customer service plays a central role in the company's operations, with customer service representatives managing thousands of daily interactions to ensure seamless communication. TireHub's commitment to personalized service strengthens customer relationships and contributes to business growth.

### TireHub's CX Vision.

TireHub aims to enhance customer relationships by using technology to augment rather than replace human connections. Their strategy focuses on providing customers flexibility in how they engage with the company while maintaining consistent service quality. This vision aligns with their commitment to building lasting partnerships through personalized support.

### A better way to deliver tire distribution support.

TireHub faced multiple challenges in delivering personalized local service while also ensuring efficient round-the-clock support. Their previous system struggled to balance these needs, limiting their ability to capture customer interaction data effectively. Only a fraction of daily calls received detailed documentation, which hindered their service quality and efficiency.

To modernize its service operations, TireHub implemented Talkdesk CX Cloud™. The new system enabled comprehensive data capture while maintaining the company's hybrid support model, which incorporates both local and centralized assistance. Using Talkdesk Copilot™, TireHub supercharged its operations, automatically documenting nearly all 2,500 daily interactions, compared to previous manual documentation of only 200-300 calls. Contact Pop features provide agents with instant access to customer histories, enabling more informed conversations.

The system gives TireHub customers the flexibility to choose between local representatives for market-specific needs or a centralized support number that maintains a 3-second average answer time for urgent matters. Talkdesk tools allow TireHub to automatically log all interaction data, saving approximately two minutes per call—over 83 hours daily—across their operation. This efficiency allows agents to provide more attentive, personalized responses while keeping comprehensive documentation for better analytics and sales opportunity identification.

### Impact.

- Documents 2,500 daily calls, up from 300.
- Saves 83 hours daily in administrative time.
- Maintained 3-second response for urgent needs.

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**"We're saving roughly two minutes per call. With 2,500 calls a day, that's 5,000 minutes freed up. This dramatic time savings allows customer service representatives to focus more on customer interaction and less on administrative tasks, improving both service quality and job satisfaction."**

— DAVID DISTEL, NATIONAL CUSTOMER SERVICE LEADER, TIREHUB



## MaxorPlus helps staff prescribe the right answers.

A division of Maxor National Pharmacy Services, MaxorPlus provides comprehensive pharmacy benefit management (PBM) services to over 1.5 million PBM and specialty members.

Their contact center is a critical link between members and essential healthcare services, managing complex benefits inquiries and prescription support. MaxorPlus' hands-on approach and dedication to healthcare accessibility are crucial to its customer service operations, and a significant contributor to improving outcomes and member satisfaction.



### MaxorPlus's CX Vision.

MaxorPlus aimed to make pharmacy services more accessible and convenient for members. They focused on using technology to increase member satisfaction by providing flexible support options and self-service tools. This approach supports their mission of improving pharmacy benefits for all.

### A better way to deliver relocation support.

MaxorPlus struggled with outdated contact center technology preventing agents from efficiently handling pharmacy benefit inquiries and prescription support. The previous system was inefficient in processing claims data, logging prescription-related calls, and routing members to specialized pharmacy benefit agents.

Anonymous feedback limited visibility into member satisfaction with prescription services, preventing MaxorPlus from making targeted improvements in pharmacy support. To better serve their 1.5 million PBM and specialty members, the company implemented Talkdesk for Salesforce™. This included advanced knowledge management, real-time analytics, and Observe.ai to modernize their prescription benefits infrastructure.

The solution's AI-powered innovations transformed the company's pharmacy benefit operations. By using Talkdesk Knowledge Management™, agents can automatically access relevant prescription and benefits information during calls. This eliminates the need for manual searches and allows for more engaging conversations about complex pharmacy needs.

MaxorPlus personnel use the solution's integration with Salesforce to track member interactions related to prescription benefits, providing actionable insights for both service and sales teams. With enhanced reporting capabilities, MaxorPlus agents can precisely measure

member satisfaction at the level of individual pharmacy benefit interactions, facilitating targeted coaching and service improvements. This data-driven approach has strengthened client relationships and provided valuable insights for expanding their pharmacy benefits management business.

### Impact.

- Achieved a 4.8 out of 5.0 member satisfaction score.
- Improved workforce retention through technology modernization.
- Enhanced sales effectiveness with real-time customer insights.

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**"We've created a system that supports greater client stickiness throughout the entire member interaction. Leveraging this advanced data, we can offer better member experiences by leaning more into the style of interactions that create the most positive results."**

— MITCH MANN, VICE PRESIDENT, MEMBER SERVICES,  
MAXORPLUS PHARMACY

CX INNOVATORS AWARDS

# CX Visionary

These visionary leaders embrace emerging technologies to transform customer experience. By combining bold AI innovation with practical business goals, they empower their teams to deliver exceptional service. Their success shows how forward-thinking leadership turns powerful technology into measurable customer experience breakthroughs.

CX VISIONARY  
WINNER



## Visionary leadership moves the future of relocation.

With more than half a million moves nationwide, JK Moving Services is one of North America's largest independent moving companies. The company's contact center manages critical customer communications across multiple time zones, serving families and businesses throughout their relocation process.



### JK Moving's CX Vision.

Ken Cohen, SVP of Sales & Business Development, envisioned redefining the moving experience by optimizing workforce expenses and enhancing employee satisfaction. His strategy focused on using intelligent technology to maintain service quality during rapid growth while supporting career development. This vision aligns with JK Moving's core values of care, respect, and commitment to growth.

### A better way to deliver relocation support.

Cohen recognized the challenge of managing increasing call volumes while maintaining service standards within the moving industry's tight margins. He saw an opportunity to support a transition to remote operations while improving workforce efficiency. Leading a complete operational overhaul, Cohen implemented Talkdesk CX Cloud™ to transform their service operations. This solution enabled JK Moving to expand their service footprint across three countries and 15 states while maintaining consistent quality.

Cohen's strategic vision significantly improved their operations. AI-powered routing now directs calls to appropriate team members across the organization, including external sales teams, enabling efficient workload distribution during peak periods. Virtual agents handle routine inquiries like scheduling and booking confirmations, providing 24/7 service without requiring constant staff coverage. Workforce management tools optimize agent scheduling and monitor interaction quality, ensuring consistent service delivery across all locations. Cohen's implementation of Talkdesk Guardian™ has enhanced quality monitoring across operations, enabling data-driven decisions about service partners and performance standards.

The platform's automated call logging and analytics capabilities have reduced agent administrative work while providing rich insights for continuous improvement. This technology foundation has enabled Cohen's team to deliver better customer experiences while significantly reducing operational costs and improving agent satisfaction through streamlined workflows.

### Impact.

- Increased inbound calls 37% with only 11% headcount growth.
- Reduced supervisor escalations by 30%.
- Achieved 98% customer satisfaction rate.

• • •

**"JK Moving is a global leader in the relocation and logistics space because we focus on what matters most—being the best, and making an impact. We believe in treating everyone with care and respect, and I personally feel very proud to be part of an organization that wholeheartedly cares about the well-being of others."**



— KEN COHEN, SVP SALES & BUSINESS DEVELOPMENT,  
JK MOVING SERVICES

## CX VISIONARY HONORABLE MENTION



# Visionary leadership embraces predictive AI to power gaming support.

The British Columbia Lottery Corporation (BCLC) conducts and manages gaming operations throughout British Columbia, generating \$2.9 billion in operating revenue to fund essential healthcare, education, and community programs. Under the leadership of Martin Lampman, Director of Customer Support Operations, their contact center supports players across the province, ensuring responsible gaming practices and delivering responsive service. BCCLC's commitment to social impact makes their customer support operations integral to both player satisfaction and community benefit.



### BCLC's CX Vision.

Martin Lampman envisioned creating a predictive customer experience that would address player needs before they arise. His strategy focused on transforming traditional support into a proactive service model that enhances the gaming experience while strengthening player relationships. This vision aligns with BCCLC's mission to generate social value through responsible gaming operations.

### A better way to spark player connections.

Recognizing that its legacy system prevented BCCLC from modernizing its approach to player support, Lampman led a complete operational overhaul. The existing platform required costly analyst support and weeks of implementation for each modification, with even minor changes requiring significant budget allocations. After seeing immediate results in an initial trial, Lampman spearheaded the implementation of Talkdesk CX Cloud™, quickly moving from pilot to full deployment. The solution integrated seamlessly with their Salesforce platform and AWS Polly APIs, creating a unified support ecosystem that transformed their ability to serve players effectively.

Lampman's strategic adoption of AI-powered solutions has significantly improved BCCLC's operations. The system analyzes speech patterns and customer sentiment during calls, providing insights that enhance service quality. Through robotic process automation, it proactively identifies and remedies potential issues before they affect players, creating a more concierge-like approach to customer support. This predictive capability enables agents to address concerns more efficiently while maintaining BCCLC's commitment to responsible gaming. Under Lampman's leadership, the organization has become a pioneer in workplace AI adoption, even partnering with the University of British Columbia on multi-year research to responsibly integrate advanced technology.

Guided by Lampman's vision, BCCLC has fostered a more transparent and supportive relationship between agents and supervisors. He reimagined performance reviews as collaborative sessions focused on growth rather than scores alone. The implementation of AI-driven coaching tools has enabled supervisors to provide real-time feedback based on call data and customer sentiment, while automated administrative tasks free agents to focus on meaningful player interactions. The introduction of chatbot functionality has successfully shifted 30% of routine inquiries away from the contact center, allowing agents to dedicate more time to complex player needs and career development.

### Impact.

- Cut average handle time by 60 seconds.
- Reduced hold times to 25 seconds.
- Decreased call abandonment to 12%.

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**"I believe this constant drive for innovation and change comes from our desire to be the best. We're always pushing ourselves forward because we're committed to excellence."**



— MARTIN LAMPMAN, DIRECTOR CUSTOMER SUPPORT OPERATIONS, BCCLC

## Serta Simmons Bedding

### Service leader helps Serta Simmons turn sleep questions into sweet dreams.

Serta Simmons Bedding is a globally recognized bedding manufacturer serving both B2B retail partners and direct-to-consumer customers. Under the visionary leadership of Amber Scott, VP of Customer Experience, the company's contact center manages diverse customer communications, from retail executive partnerships to end-user support.



#### Serta Simmons' CX Vision.

Amber Scott envisioned unifying the customer experience across B2B and B2C divisions while maintaining personalized service for each segment. Her strategy focused on transforming disconnected service channels into a cohesive support system that educates and guides customers. This vision aligns with Serta Simmons' core values of transparency and compassion in helping customers make informed decisions about their sleep health.

#### A better way to a good night's sleep.

When Scott joined Serta Simmons, she discovered fragmented customer service operations where different divisions operated separate instances of contact center platforms with limited cross-communication. The expansion into direct-to-consumer sales required a fundamental shift from supporting retail partners to educating end users about sleep solutions. Drawing from her experience at Tuft and Needle, Scott led the implementation of Talkdesk Retail Experience Cloud™ to transform Serta Simmons' service operations.

Scott's innovative approach unified the platform, providing agents with instant access to customer information across all channels and enabling consistent service delivery regardless of customer type. Real-time analytics and sentiment analysis help agents provide personalized guidance based on specific sleep needs and preferences. Under Scott's direction, the team developed a unique approach where agents view each customer interaction holistically, recognizing that specific challenges often indicate broader sleep-related needs.

Scott fostered an environment where agents move beyond scripts to provide creative, personalized solutions, supported by AI that surfaces relevant information during calls. This approach has transformed their B2C support, with agents now functioning as sleep wellness consultants rather than traditional customer service representatives. Quality management tools facilitate

agent development through successful interactions, while automated data collection provides insights for both service improvements and product development. The integrated solution has helped Serta Simmons create a more efficient, data-driven operation that maintains the personal touch essential in sleep solution consulting.

#### Impact.

- Unified B2B and B2C operations under a single platform.
- Reduced average wait times significantly.
- Improved agent satisfaction through automated workflows.

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**"By giving our agents more autonomy, I've noticed that customer sentiment has also improved. We train our agents to recognize that customers are people, and that the specific challenge they call in may be one symptom of a larger problem."**



— AMBER SCOTT, VP CUSTOMER EXPERIENCE,  
SERTA SIMMONS BEDDING

# Our esteemed judges



**Nancy Jamison**

Senior Industry Director, ICT,  
Frost & Sullivan



**Jon Arnold**

Principal, J. Arnold Associates



**Nate Brown**

Co-Founder, CX Accelerator



**Francisco España**

GM Startups and Digital Natives,  
Central & South Europe | Executive  
Board Member, Microsoft



**Sheila McGee-Smith**

President & Principal Analyst,  
McGee-Smith Analytics, LLC



**Zeus Kerravala**

Founder & Principal Analyst,  
ZK Research



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