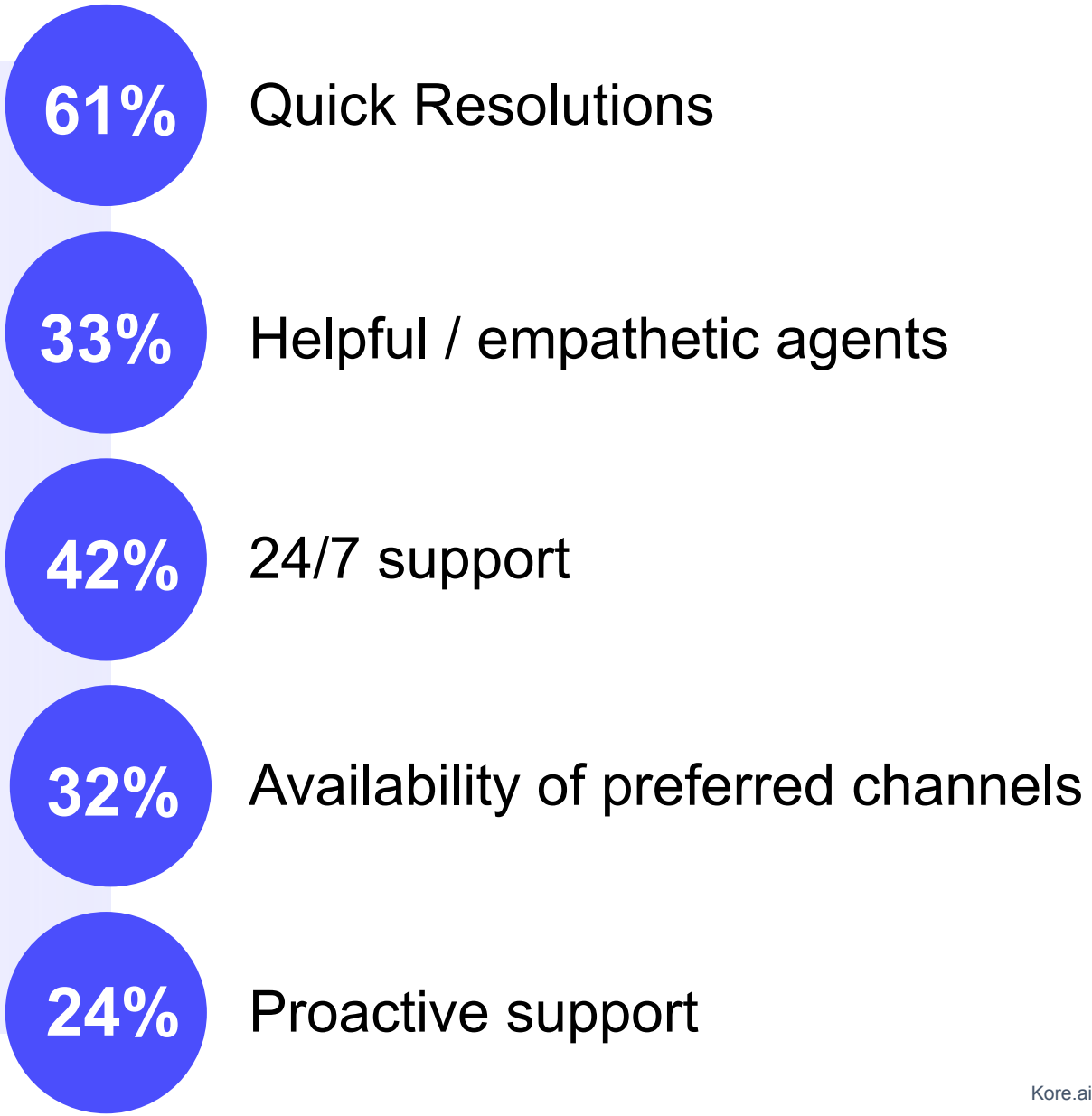
Experience Optimization (XO) Platform

Sales Presentation



It is an experience driven world

Customers value speed, but increasingly want empathy and access to preferred channels



Assistant needs to engage across multiple user types

Key insights from emerging user personas

Uncovered from qualitative research with ~ 20 participants

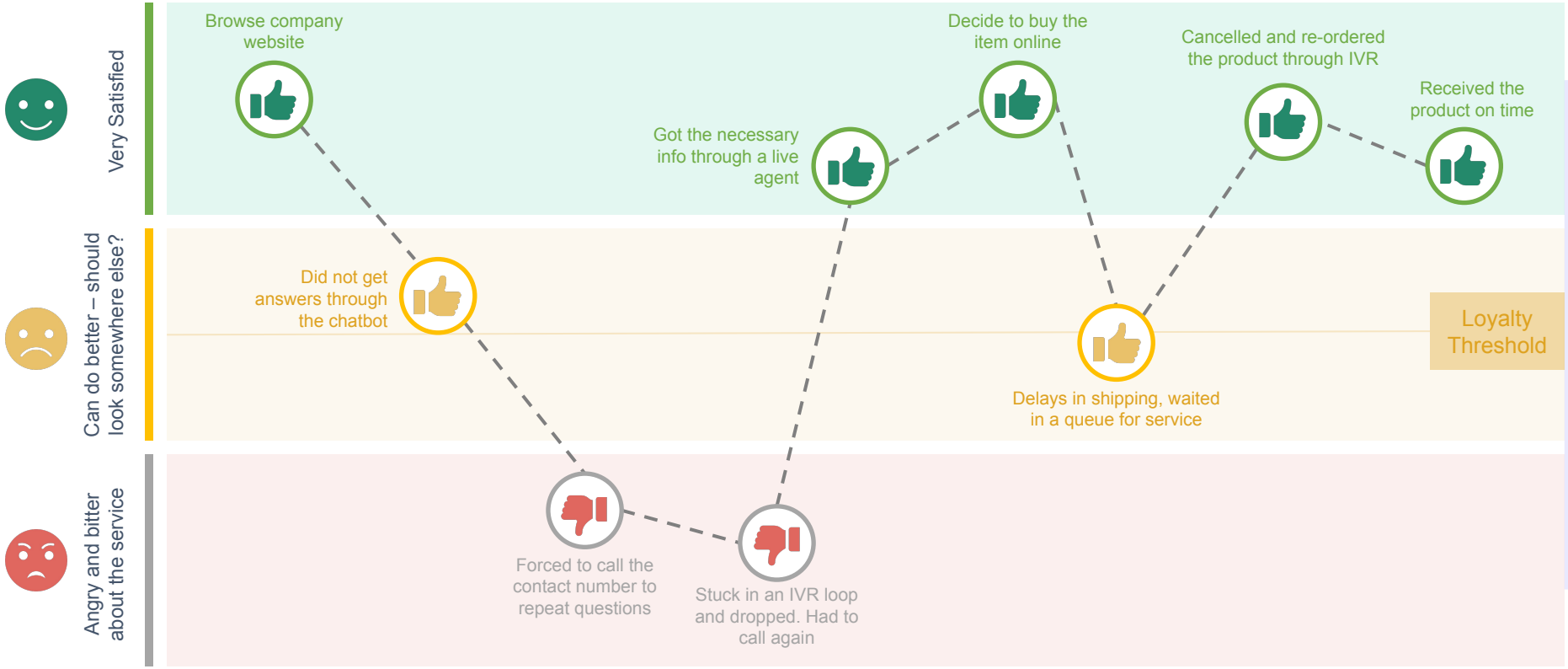
 1 Never used a bot	 2 Novice bot user	 3 Advanced bot user
Low digital savviness	Medium digital sawiness	High digital sawiness
Influencers are friends and family		Influencers are primarily online platforms
No experience with bots; unaware of what bots are & what they are capable of	Limited experience; Associates bots with fixed click-based replies	Extensive experience with bots; Considers Alexa as a benchmark for the potential of a bot
Desires humane, "non-robotic" conversations with the bot. Will appreciate a bot that is affable, polite and adept at problem-solving		
Prefers the bot to have a female voice		Indifferent to gender of the bot
Role of the bot - Knowledgeable advisor who is unbiased and objective		Role of the bot -Advisor giving tailored and personalized recommendations per portfolio





What does your customer experience look like today ?

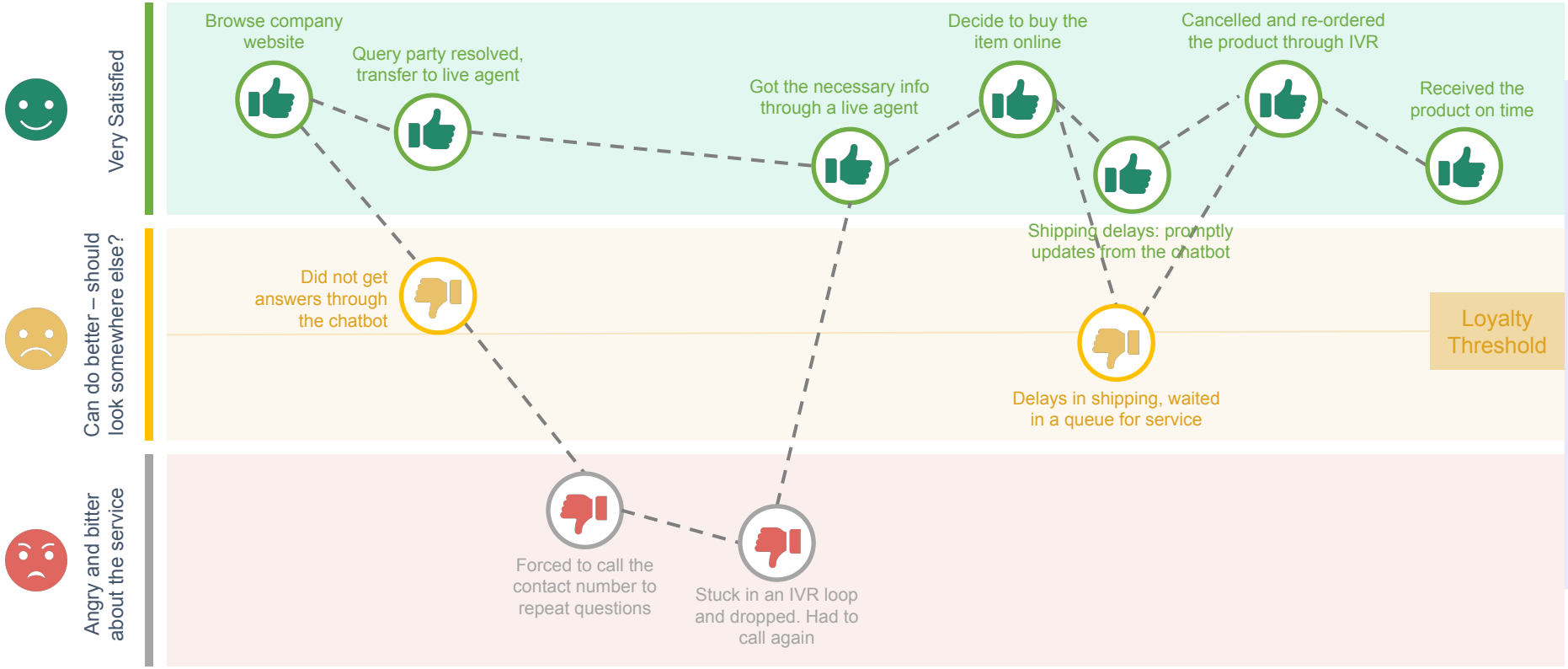
Each customer touchpoint defines the TOTAL customer experience.



It only takes a few poor experiences to cause customers to consider switching to your competition

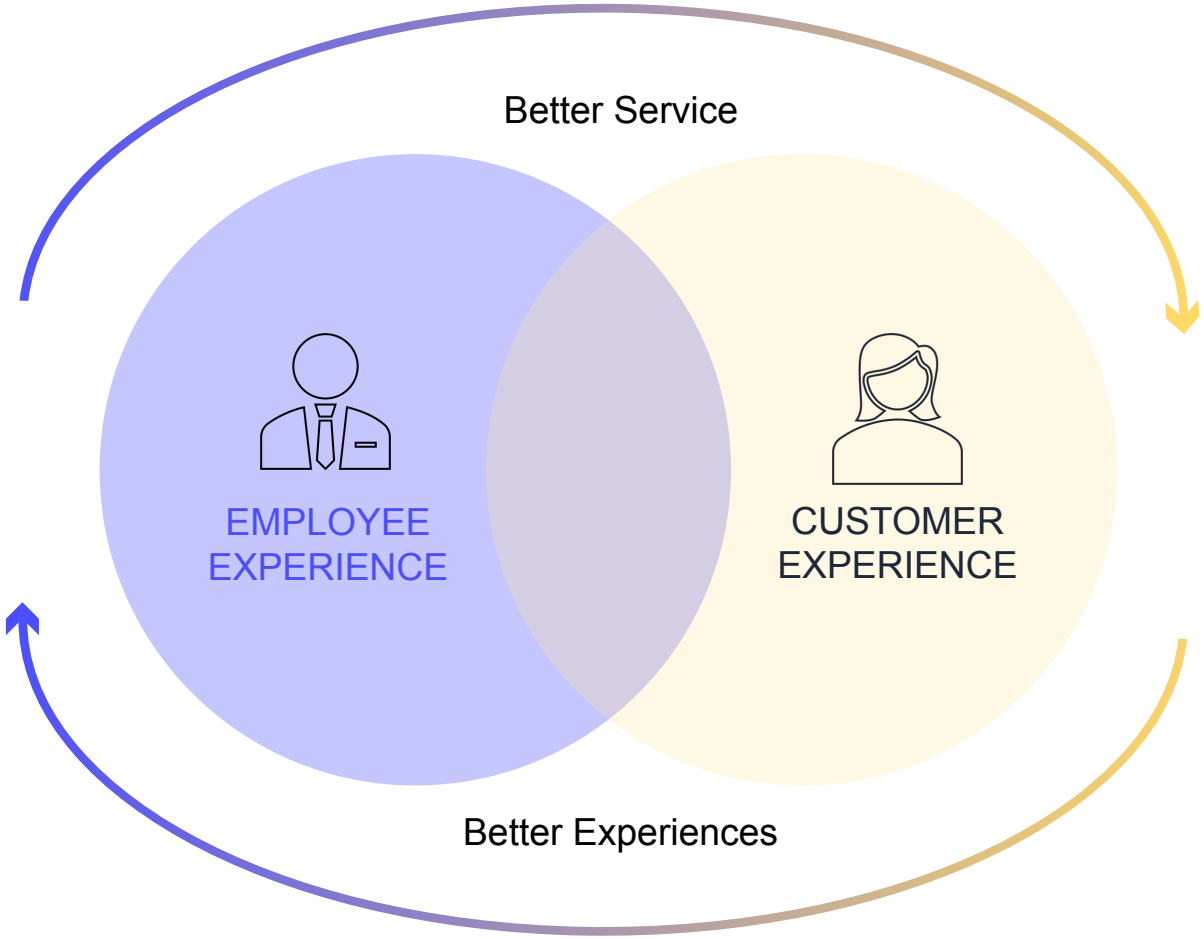
To drive customer loyalty, you need to deliver great to exceptional service…

… at every touchpoint



Organizations must be responsive to customer demand for CX excellence in order to build and maintain lifetime loyalty among their customers

~~Great~~ Exceptional Customer Service Starts From Great Employee Experience



Increased Engagement

Engaged employees go the extra mile to promote their brands

Better Performance

Happier employees are more motivated and productive increasing performance rates

Higher Retention

Good employee experience results in employees staying longer and creates a good employer image

Customer Delight

Research shows that customer satisfaction is deeply connected to greater employee satisfaction

Kore.ai defines Experience Optimization or ‘XO’

> Delivering extraordinary experiences, for customers, employees, and agents, using AI-native automation and augmentation across voice and digital channels, resulting in optimal business outcomes

Kore.ai Named Leader in 2023

Conversational AI Gartner Magic Quadrant

Twice in a row

Gartner Highlights Kore.ai Strengths

- **Market understanding:** Kore.ai has an **excellent understanding of the major enterprise use cases** and the requirements
- **Solutions Clarity:** The company's CX and EX solutions are among **the sharpest found in this research**
- **Product capabilities:** An **extensive feature set and capabilities** that are **available to non-developers** and non-data scientists in no-code tooling
- **Ease of Use:** **Easier to operationalize** by a variety of users across different business units
- **Innovation and excellence:** **Large development organization** allows Kore.ai to stay up to date with the R&D trends and emerging demand for capabilities
- **Toolkit:** Comprehensive **toolkit for NLP**, as well as a complete portfolio of **connectors and integrations** with channels and leading back-end systems

Figure 1. Magic Quadrant for Enterprise Conversational AI Platforms



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One Unified Platform to Optimize All End-user Experiences

Platform

Kore.ai Experience Optimization (XO) Platform Component Architecture

Solutions

Customer Experience

- BankAssist
- HealthAssist
- RetailAssist
- TravelAssist

Employee Experience

- IT Assist
- HR Assist
- RecruitAssist
- SalesAssist
- ProcureAssist

Deployment Platforms

- SmartAssist
- AgentAssist
- WorkAssist
- SearchAssist

Platform (Experience Optimization (XO) Platform)

Channels

- Enterprise Messengers
- Social Messengers
- Web & Mobile
- Email & SMS
- Live Chat
- Voice Assistant
- IVR

Tooling

LLM and Generative AI Capabilities

• Zero-shot Learning • Few-shot Learning • Intent Discovery • Use case Suggestions • Auto-dialog Generation • Training and Test Data Generation • Intent Less Model • Conversation Insights • Dynamic Paraphrasing

Topic Modeler

- Intent discovery from transcripts
- Discourse patterns discovery
- Auto dialog generation
- Continuous training

Dialog Builder

- Conversation designer
- Preview, share and collaborate
- Auto-dialog generation with 2-ways sync
- No code builder with infinite canvas
- Reusable flows and components
- Proactive notifications
- Small talk

Knowledge AI

- Connectors to extraction enterprise knowledge
- Built-in content review and de-duplication workflow
- Smart answers / natural language response generation
- Auto generation of domain ontology

Voice AI

- Native integration with ASR and TTS systems
- Native IVR integration/VXML support
- Contextual speech adaptation
- Visual IVR
- Inbound/ outbound call

Multi-Engine NLP

- ML models with unsupervised and supervised training
- Ontology-based knowledge graph
- Computational linguistics model
- Traits

Test & Validate

- Simulation
- NLU and flow regression
- Continuous improvement with Explainable AI
- Goal-driven Validations and recommendations
- Model validation

Enterprise Integrations

- Auth configuration
- Service orchestration
- Request processor
- Categories
  - Enterprise Apps
  - IVR & agent software
  - Third-party NLU
  - RPAz z vv vv

AgentAssist

- Agent desktop
- Conversation insights
- Next best action
- Agent collaboration
- Load management

Conversation Lifecycle

Omnichannel Interface

- Authorization
- Channel API handling
- Auto format messages by channel
- Cross channel context

Conversational Intelligence

- Multi-turn dialog management
- Nested and follow-up intents
- Multiple intents
- Amend entity value
- Pause and resume intents
- Context management
- Sentiment management

Enterprise-grade Security

- Secure message store
- PII masking
- Encryption
- Summarization templates

Analytics & Insights

- Usage metrics
- Performance metrics
- Conversation insights
- NLP metrics
- Custom dashboards
- Conversation flows

Enterprise Services

Enterprise Administration

- User management
- Assistant management
- Enrolment

Security & Compliance

- SSO
- Domain verification
- Compliance (GDPR, HIPPA, PCI)

Continous Improvement & Continous Development

- Versioning
- Version comparison

Deployment

- Cloud
- On-premise
- Hybrid

Scalability & Extensibility

- Multi-tenant
- Botkit

Unlimited Possibilities with the Kore.ai XO Platform

Diverse use cases to transform every industry and every department

Platform

Customer Experience

Healthcare

- Drug Information
- Patient Reminder

Insurance

- Add Dependents
- Fetch Policy Information

Banking

- Open an Account
- Check Balance & Transfer Money
- Schedule an Appointment
- Report a Lost/Stolen Card
- Plan Investment & Process Trade

Manufacturing

- Machine Maintenance Alerts
- Fetch Equipment Information

Telecom

- Promotions & Offers
- Recharge Assistant

Travel

- Virtual Help Desk
- Loyalty Program
- Booking Assistance

Retail

- Product Notifications
- Shopping Assistance
- Operational Support

Employee Experience

Human Resources

- Organizational Policy FAQs
- Leave Management
- Visa & Permits

IT Services

- Asset Management
- Outage Alerts
- Software/Hardware Request Fulfillment

Marketing

- Personalized Marketing
- Customer Analytics
- Social Media Outreach

Finance

- Vendor Onboarding
- Payroll Processing
- Procurement

Sales

- Lead scoring & nurturing
- Sales forecasting
- Data entry automation
- Contact Analytics
- Scheduling support
- Opportunity scoring & guided selling

Unique Stories

with Extraordinary Business Outcomes

Citi Bank

Multilingual, Multibrand IVA

90%
Containment Rate

18%
reduction IVR Volume

Florida Blue

Visual IVR Assistant

1000+
Digital Cards/Day

3X
Lesser Resolution Time

Pfizer

35 IVAs in 25+ Languages

Reduced
Load on Live Agents

50%
Reduced Wait & Hold Time

ABInBev

Multilingual Email Clustering IVA

90%
Accuracy Rate

$187K
Annual Saving

Enbridge

HR Virtual Assistant

85%
Containment Rate

10X
Lesser Resolution Time

AAA Insurance

Customer Support IVA

700+
Daily Requests

81%
Containment Rate

Powered by the Kore.ai Experience Optimization (XO) Platform

Platform

NO-CODE UNIFIED PLATFORM

Intuitive UI-based platform for all your conversational AI implementation requirements

GENERATIVE LANGUAGE MODELS

Harness the power of large language models and generative AI technologies to accelerate development

MULTI-MODEL NLU

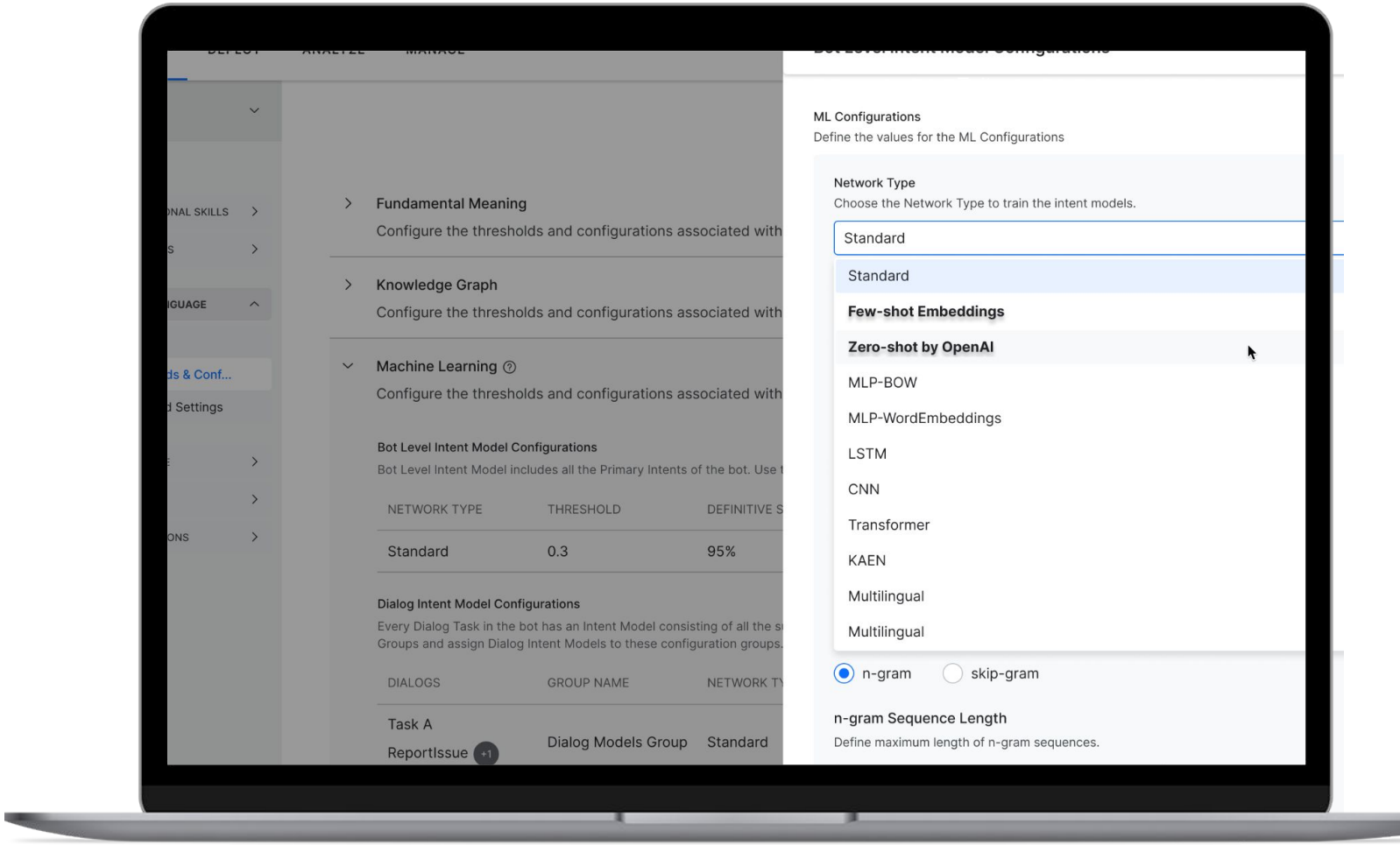
Accurate outcomes with minimal training and state of the art AI by leveraging LLMs and Generative AI.

CONVERSATIONAL ANALYTICS

Comprehensive in-built conversational analytics with custom dashboards, NLP metrics and more

OPEN ARCHITECTURE

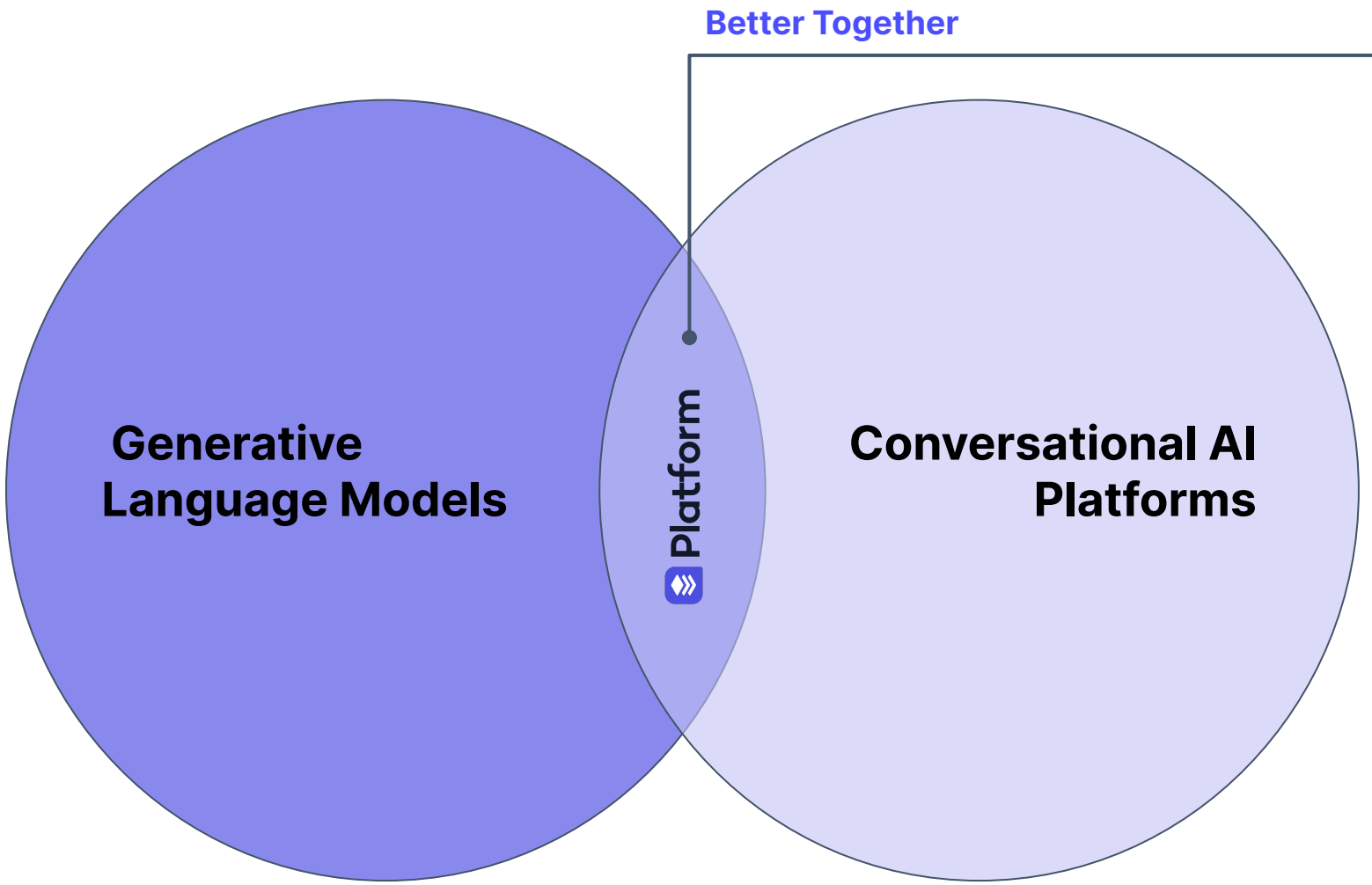
100+ Prebuilt connectors to integrate with popular enterprise systems.



How does Kore.ai look at Generative AI, Large Language Models and Conversational AI?



Generative Language Models & Conversational AI Platforms



Kore.ai XO Platform

Together they offer incredible benefits -

- → **Better Understanding**
- → **Higher Accuracy**
- → **Improved Efficiency**
- → **Complete Flexibility**
- → **Faster Time-to-market**

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Better Together

Leveraging Large Language Models & Generative AI

Smart Copilot

For IVA Development

Smart suggestions and recommendations to quickly build, train and test IVAs.

- ✔ Use Case Suggestions
- ✔ Conversation Preview & Auto-dialog Generation
- ✔ Training Data Suggestions
- ✔ NLU Test Data Suggestions



Dynamic Conversations

Based On Generative Language Models

Facilitating natural, human-like conversations by dynamically handling user requests.

- ✔ Zero-Shot Learning Model
- ✔ Few-Shot Learning Model
- ✔ Knowledge AI
- ✔ AI-Assisted Adaptive Dialog
- ✔ Dynamic Paraphrasing



Advanced Analytics

Powered By Generative Language Models

Intelligent metrics and insights for evaluating the performance of NLU and flows.

- ✔ User VA Conversation Insights
- ✔ Intent Discovery
- ✔ Agent Performance Insights
- ✔ Quality Management Insights
- ✔ Agent Customer Interaction Insights



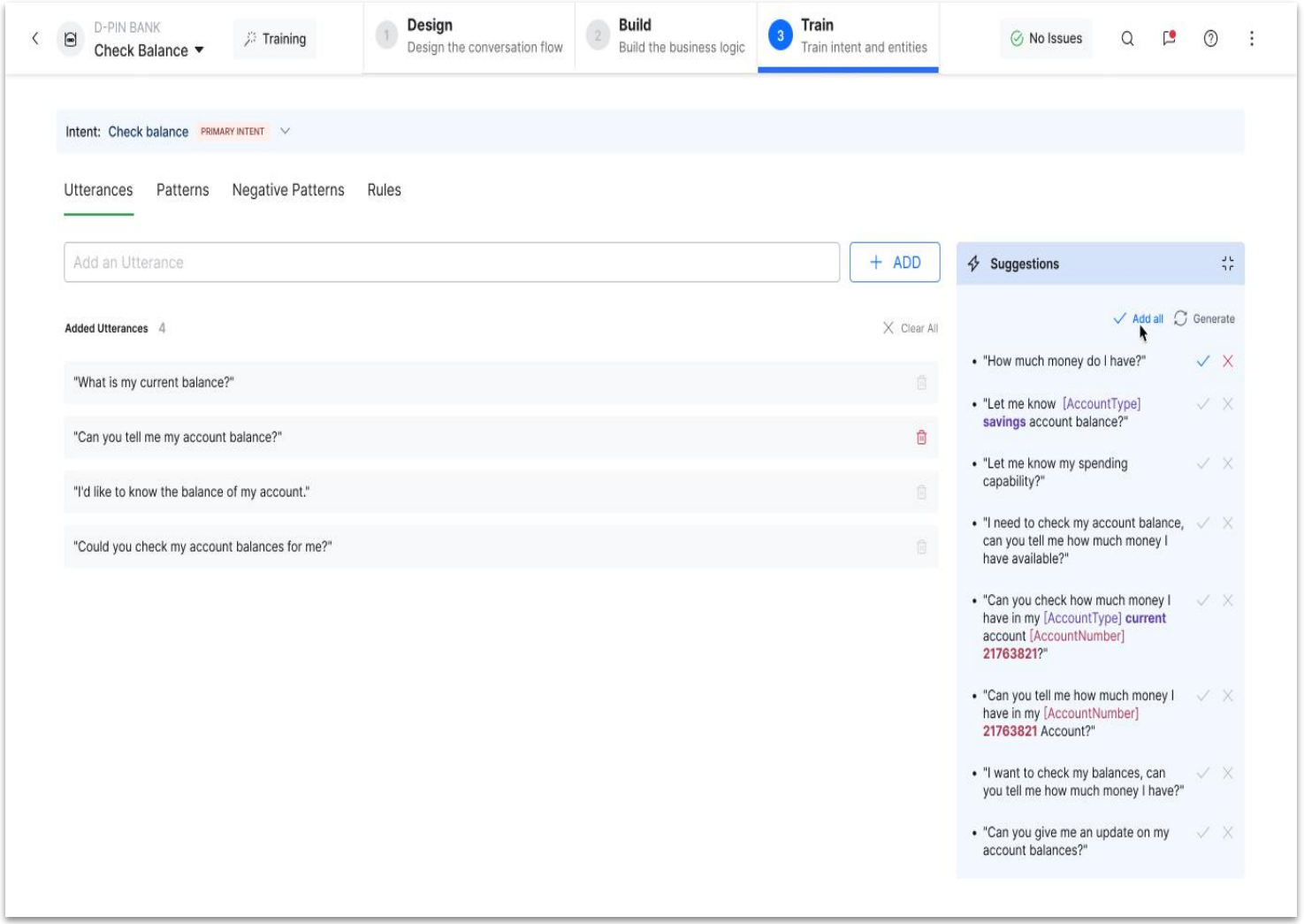
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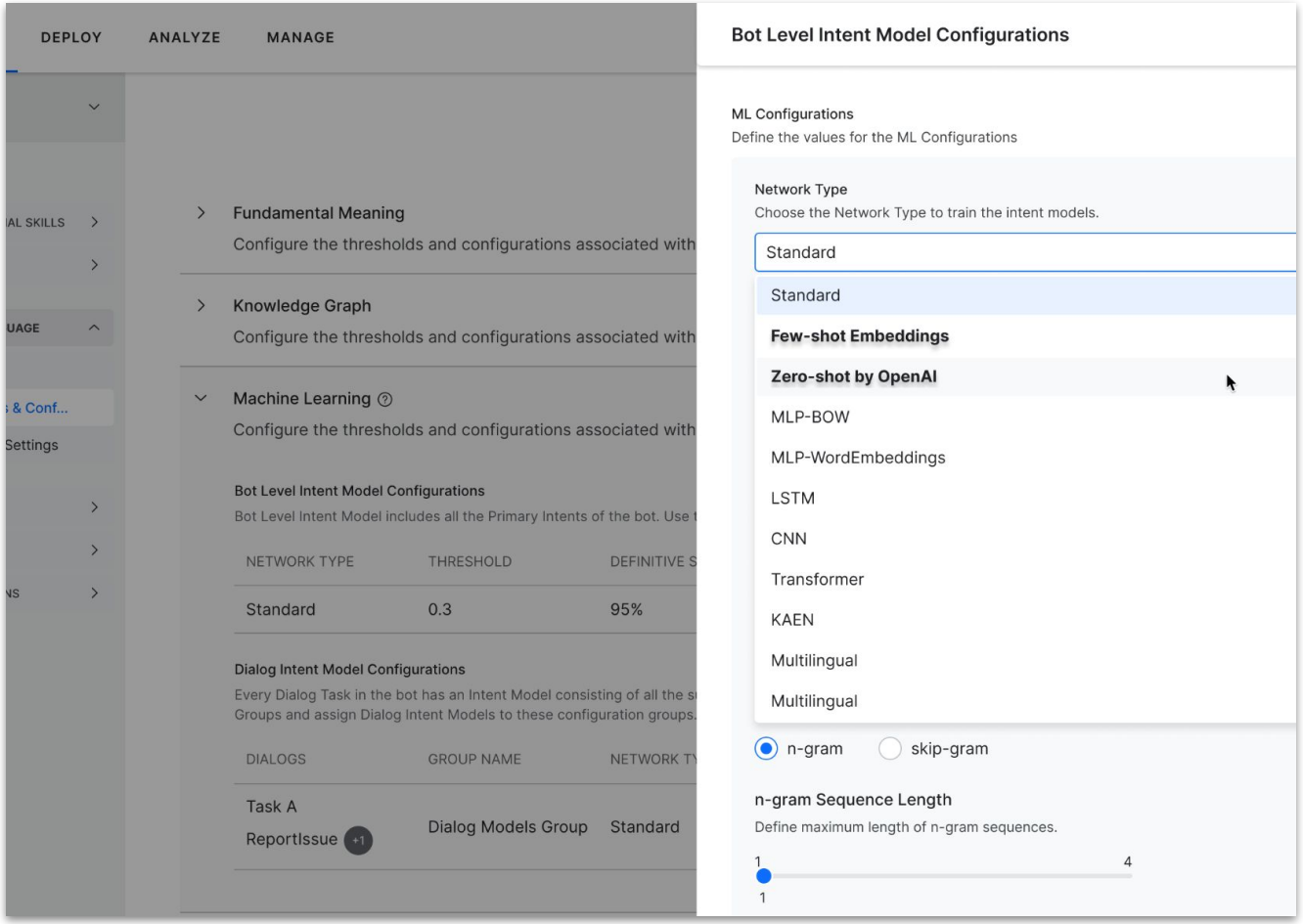
Kore.ai Confidential

Smart Co-pilot for IVA Development

- **Use Case Suggestions**
  - Build sophisticated virtual assistants with smart use case suggestions
- **Conversation Design Preview & Auto-Dialog Generation**
  - Fast-track your IVA development with XO Platform advanced LLM & Generative AI capabilities
- **Training Data Generation**
  - Speed up the training by 10x by employing the LLM-based suggestions
- **Test Data Generation**
  - NLU Test Data Suggestions Achieve efficient testing through advanced test data suggestions



Dynamic Conversations Based On Generative Language Models



- **Zero-Shot Learning Model**
  - Achieve rapid development by eliminating the training effort
- **Few-Shot Learning Model**
  - Consistent high performance with only 1/10th of the necessary training
- **Knowledge AI**
  - Instantly retrieve & summarize answers from multiple documents without prior training
- **AI-Assisted Adaptive Dialog**
  - Enrich customer interactions with dynamic conversations for human-like experiences
- **Dynamic Paraphrasing**
  - Generate engaging responses by leveraging the generative AI techniques

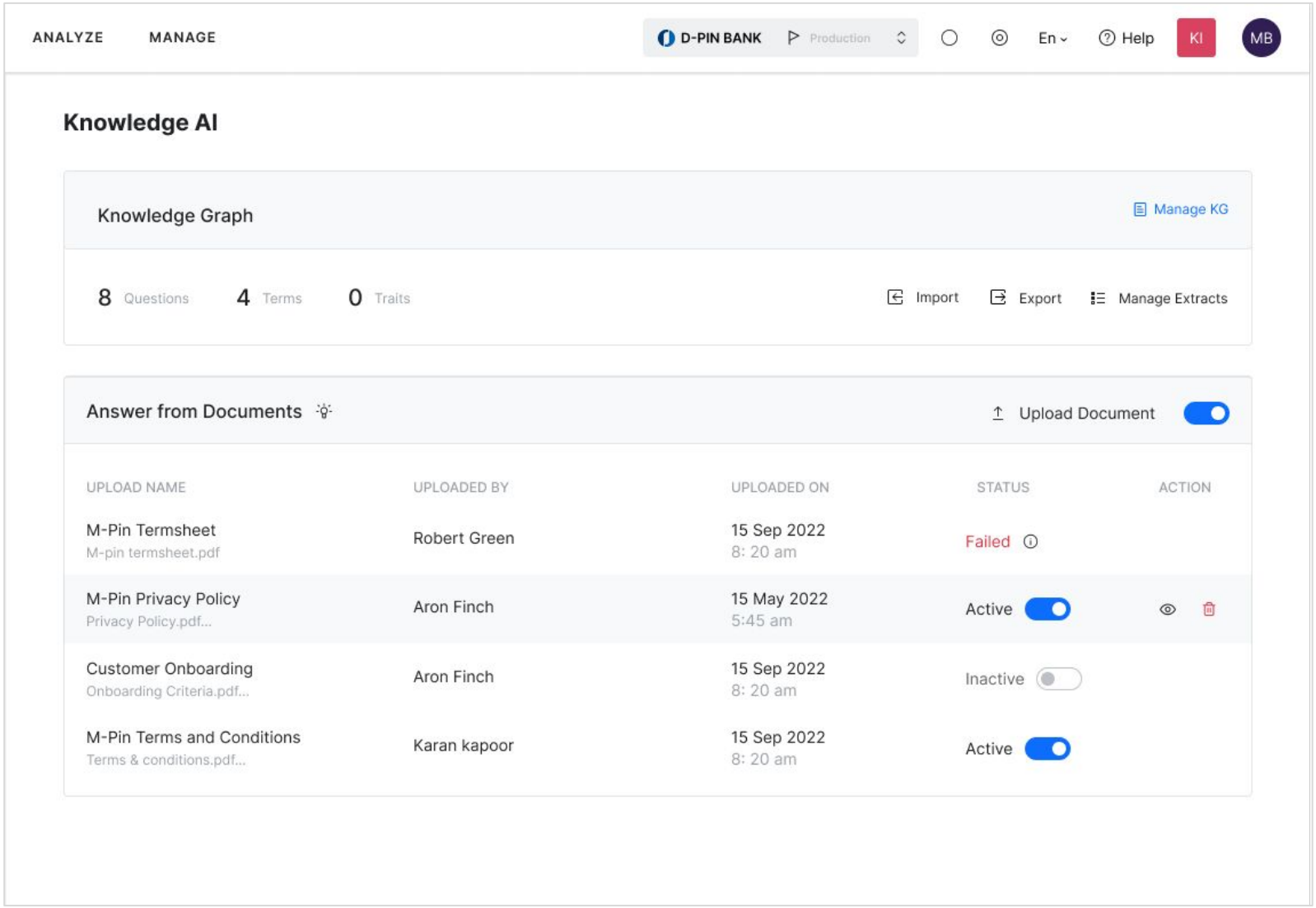
Zero-Shot and Few-Shot Training Models

Platform

Zero-Shot Model (with OpenAI)	Few-Shots Model (Kore.ai Hosted Embeddings)
Key Considerations ● Identify and define granular intents describing the purpose of user interaction, and not what bot can do ● Works well when the bot has good intent coverage ● Dialog intents and FAQs need to be treated the same ● No option to tweak the training if something does not work ● Utterances are required to train entities	**Key Considerations** ● Identify and define granular intents describing the purpose of user interaction, and not what bot can do ● Works well when the bot has good intent coverage ● Dialog intents and FAQs need to be treated the same. ● Will require few training utterances to for specific scenarios ● Utterances are required to train entities
● Intent names and user utterances will be **shared with OpenAI** ● Bot designer needs to enable the integration with OpenAI by providing the API Key	● No data is shared externally. LLMs are hosted with the Kore.ai XO Platform ● No additional enablement or cost is involved
Advantages ● No training required ● Uses OpenAI's LLM & Generative AI models to identify the intent names by comparing the user utterance	**Advantages** ● Limited training required. ● Consistent responses, and easy to predict ● Easy to extend by additional training

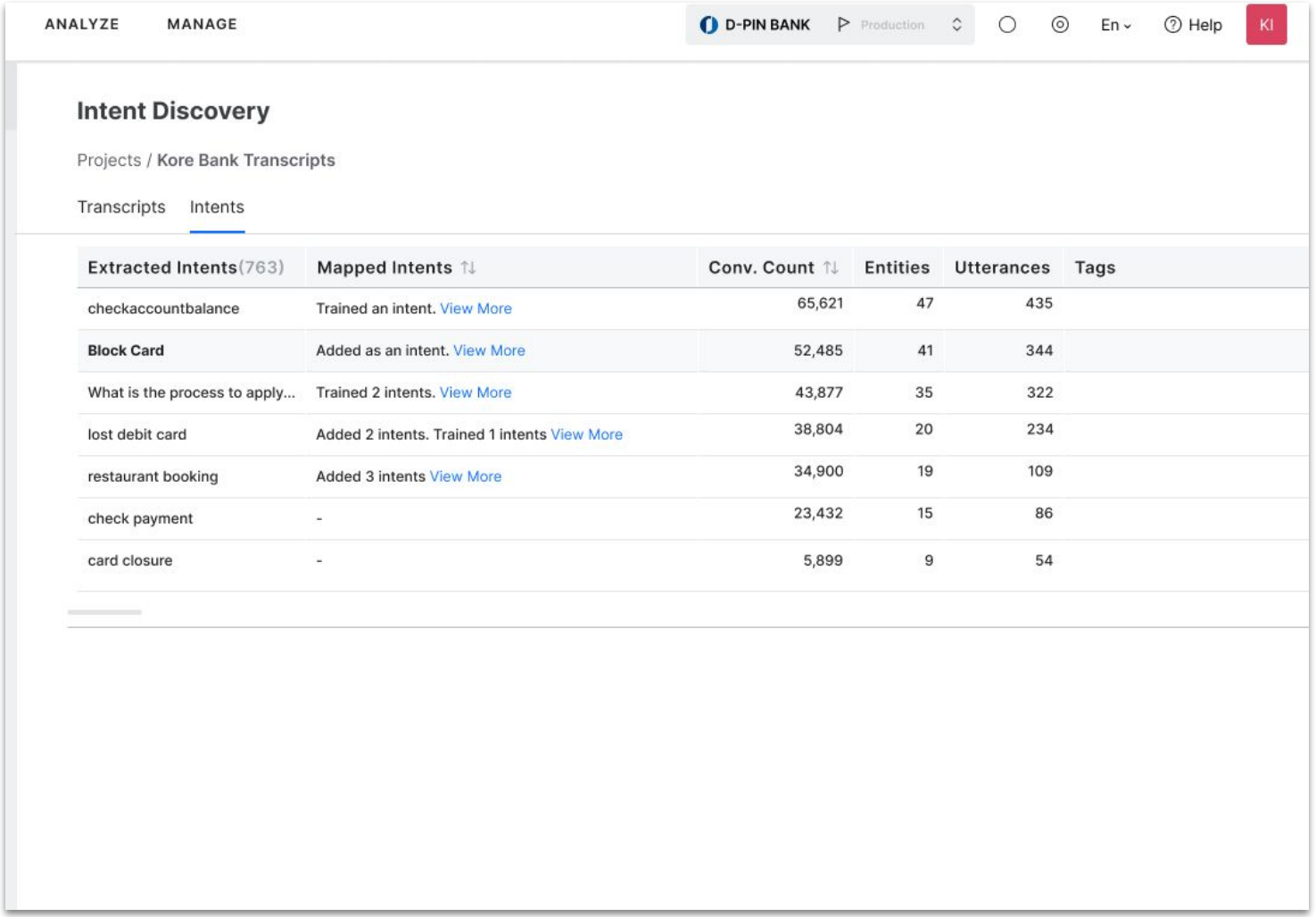
Answer from Documents - Knowledge AI

- **Automatically answer** FAQs from PDF documents
- Not required extract the FAQs or train the Knowledge Graph
- FAQ identification as well as answer generation is handled **out-of-the-box**
- Answer generation is enabled via **integration with OpenAI**
- Designers can choose to review the auto-generated answers, curate the answers and add them to Knowledge Graph



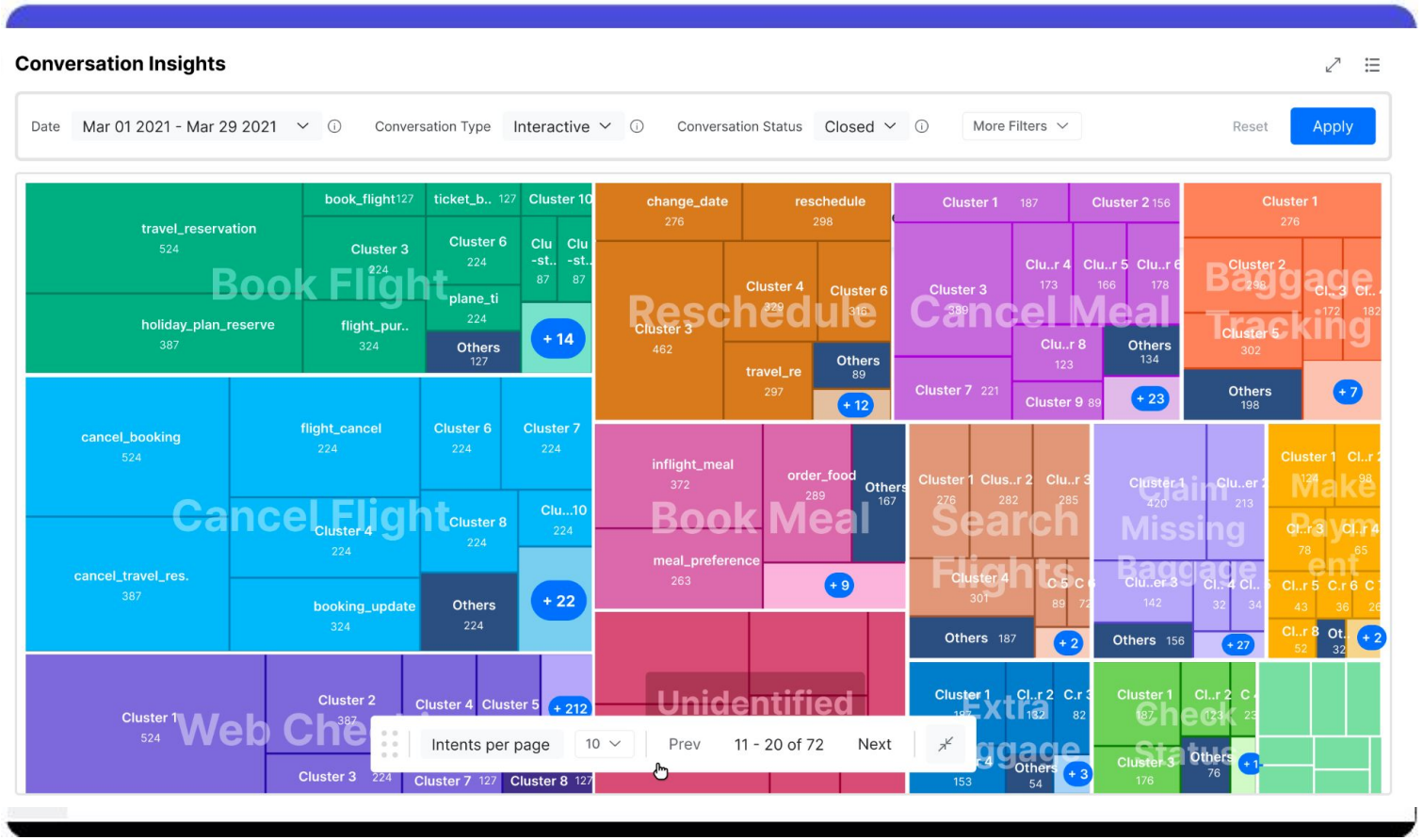
Advanced Analytics Powered By Generative Language Models

- **Conversation Insights**
  - Enhance the IVA training by uncovering false positives and negatives
- **Intent Discovery**
  - Develop IVAs from transcripts by processing the historical chat transcripts
- **Agent Performance And Interaction Insights**
  - Empower customer support agents by suggesting the next-best action, rephrasing messages, and sharing post-call summaries



Conversation Insights

Platform



- Visual map of the user utterances to easily discover false positives, false negatives and opportunities to train new intents
- User utterances are clustered based on semantic meaning and mapped against intents
- Drill down to clusters or intents to analyze the utterance
- Follow-up actions to add training to Dialog or FAQ intents or identify and create new intents

Intent Discovery - Automate Dialog Generation

Platform

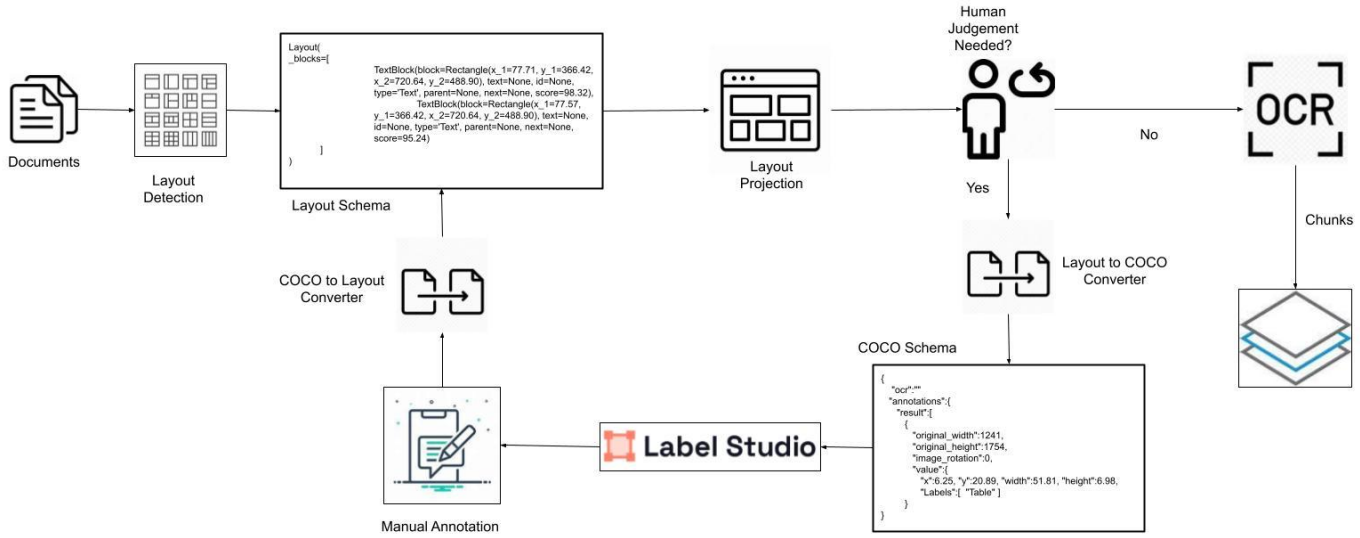
- Add agent interactions and historical transcripts from PDF or CSV into the platform automatically.
- The platform intelligently extracts the information, reads, analyzes and identifies the intents and flows.
- Leverages this data to build virtual assistants and to communicate with customers/users proactively.



Knowledge AI / Document AI (ETA - May 2023)

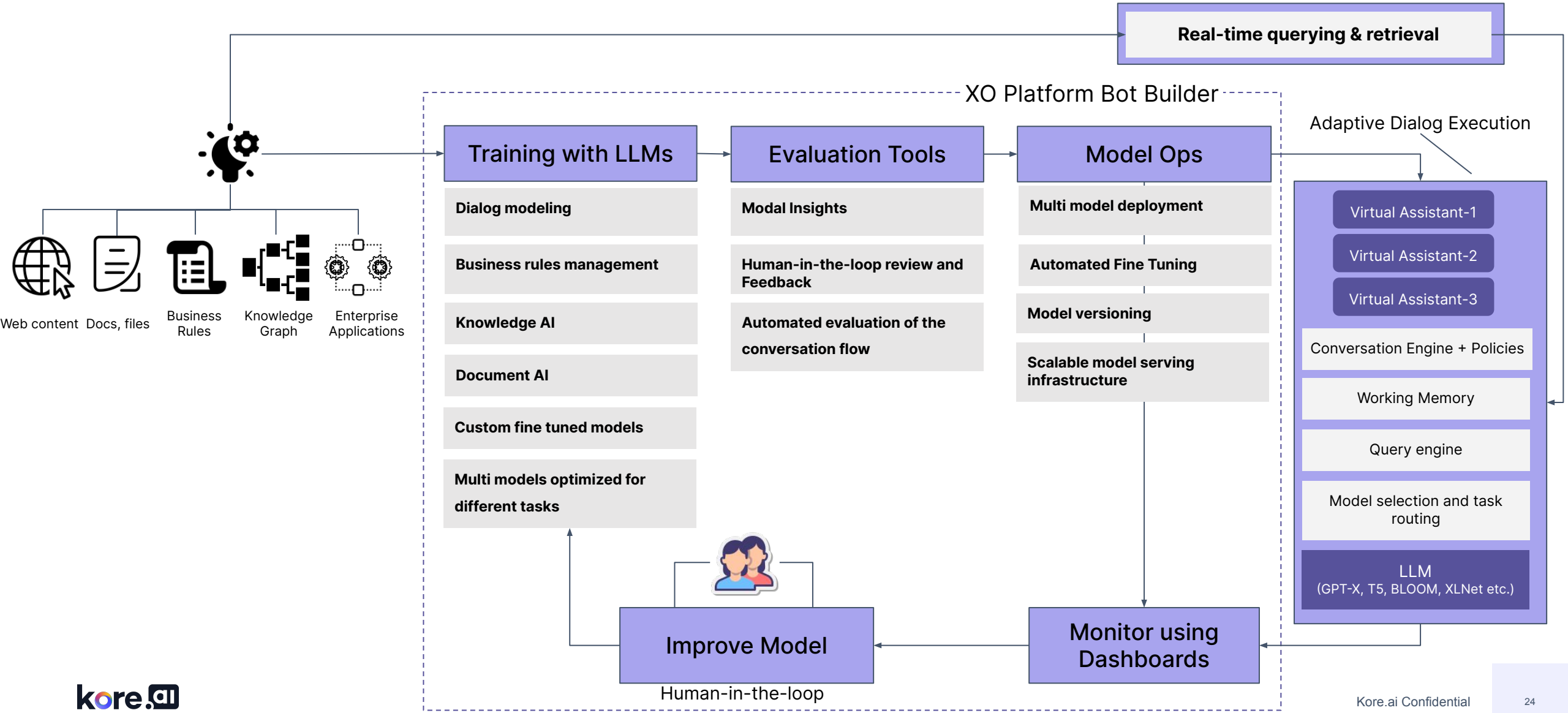
Platform

- Intentless models to answer questions and generate conversational responses
- Retrieval augmented LLM to answer with fluidity while grounded to factual information
- Document AI
  - Automatically extract layouts from documents
  - Context aware intelligent chunking
  - Workflow with ability to include Human review and feedback
  - Pre-process documents for cleanup and context enrichment
  - Extract text, tables, charts and images, support for OCR
- Support multiple content sources - websites, file drives, content management systems
- Content refresh with dynamic retrieval and periodic synchronization
- Support for Ontology
- Topics extraction
- Answering using context, with citations



Generative AI LLM for Enterprise (GALE) Framework

Platform



kore.ai

Innovative Capabilities to Enhance Development Experience

Delivering extraordinary experiences for customers, and employees, globally

Platform

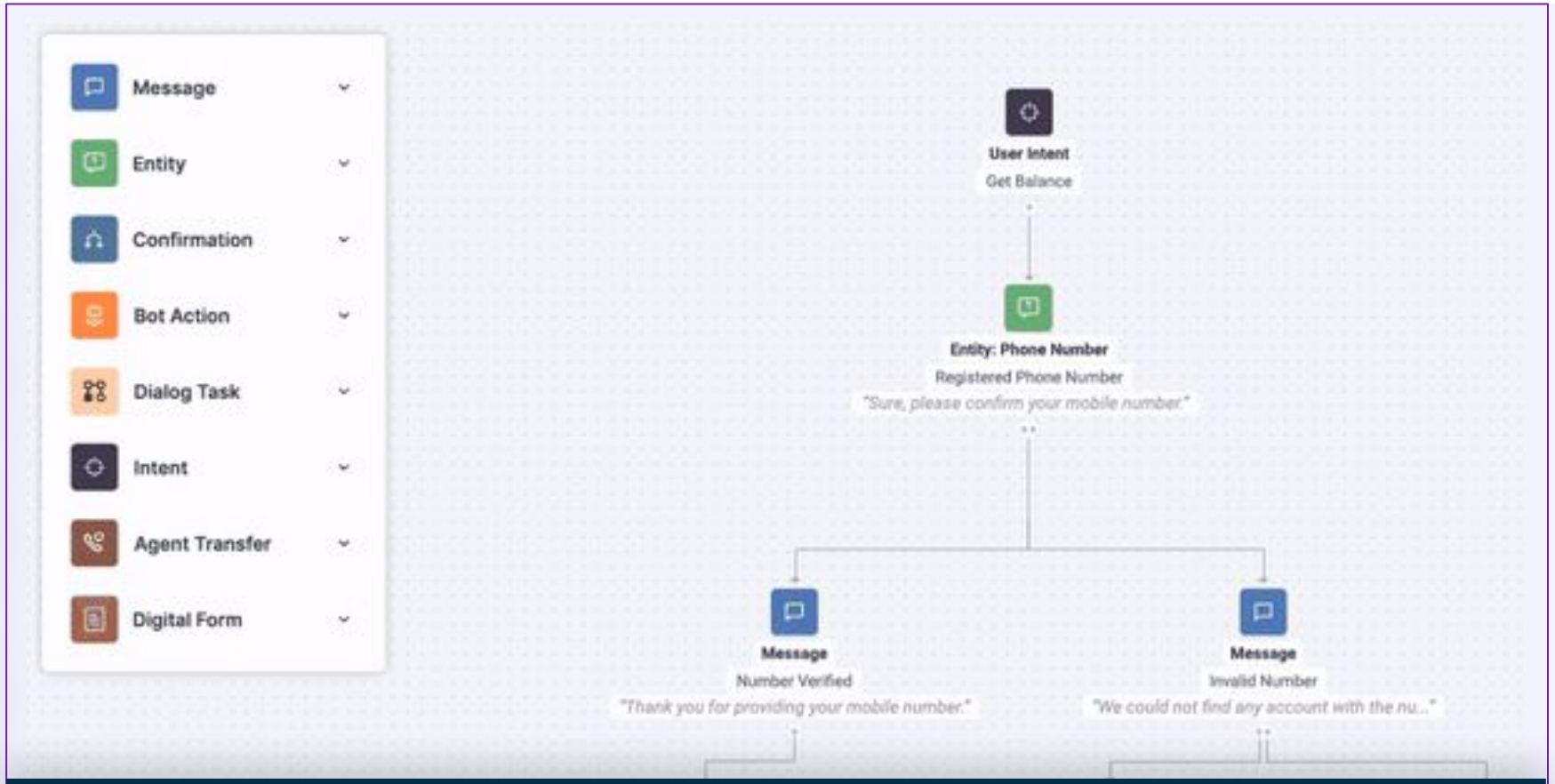
NO-CODE

UNIFIED PLATFORM

MULTI-ENGINE NLU

MULTICHANNEL

ANALYTICS



- Actionable insights of virtual assistant usage in a single dashboard
- NLP metrics to track failed and successful utterances

Innovative Capabilities to Enhance Development Experience

Delivering extraordinary experiences for customers, and employees, globally

Platform

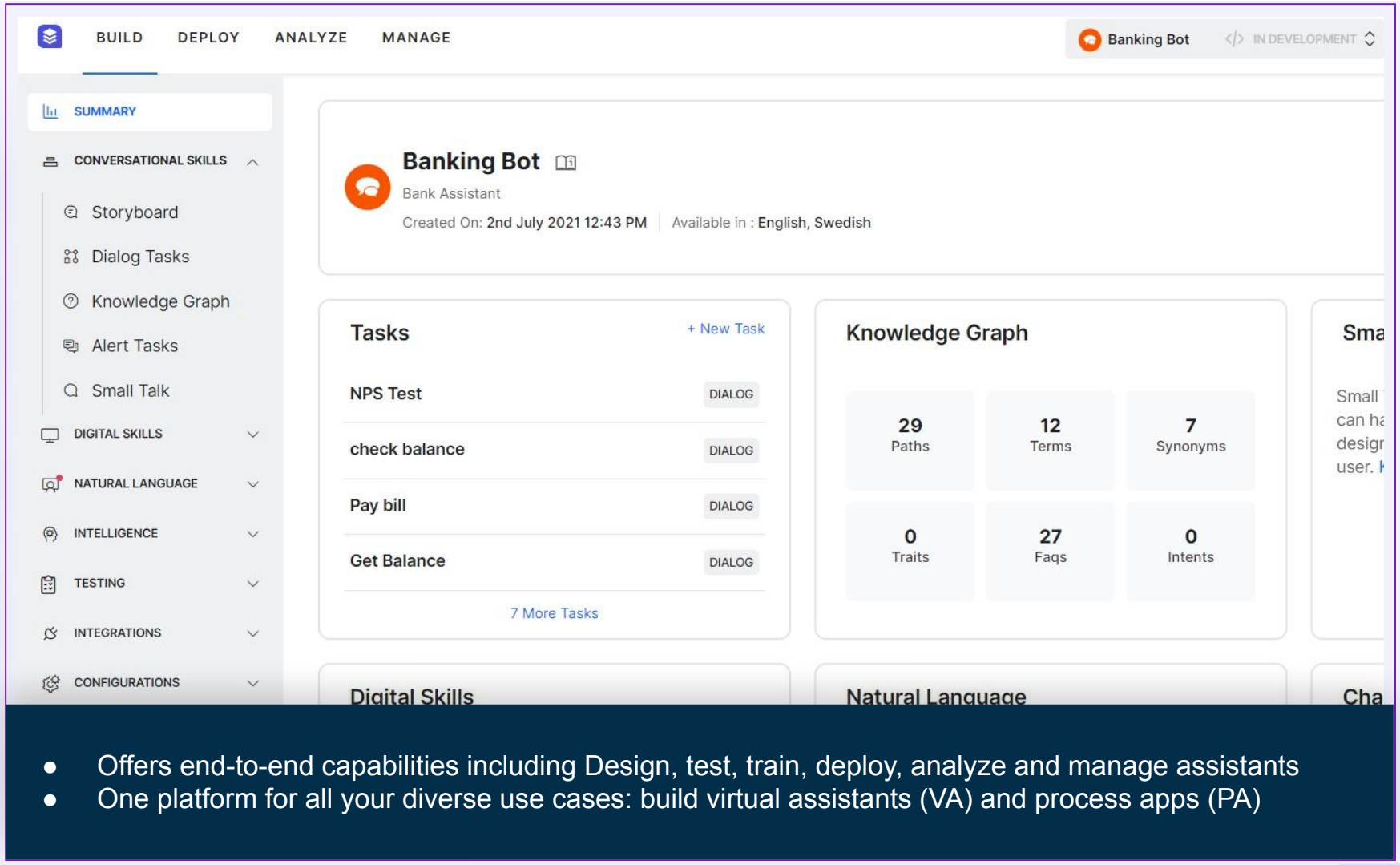
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UNIFIED PLATFORM

MULTI-ENGINE NLU

MULTICHANNEL

ANALYTICS



- Offers end-to-end capabilities including Design, test, train, deploy, analyze and manage assistants
- One platform for all your diverse use cases: build virtual assistants (VA) and process apps (PA)

Innovative Capabilities to Enhance Development Experience

Delivering extraordinary experiences for customers, and employees, globally

Platform

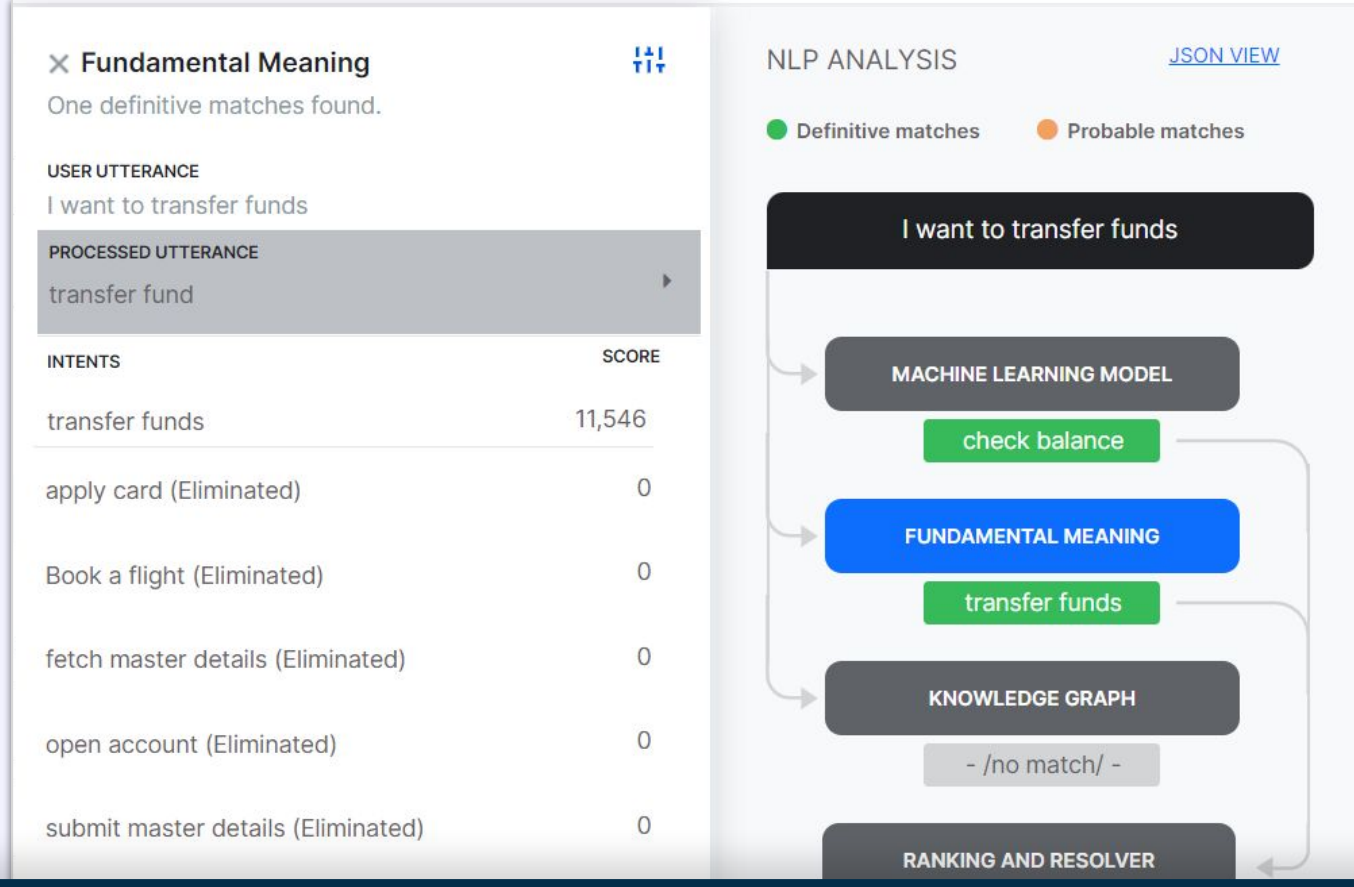
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UNIFIED PLATFORM

MULTI-ENGINE NLU

MULTICHANNEL

ANALYTICS



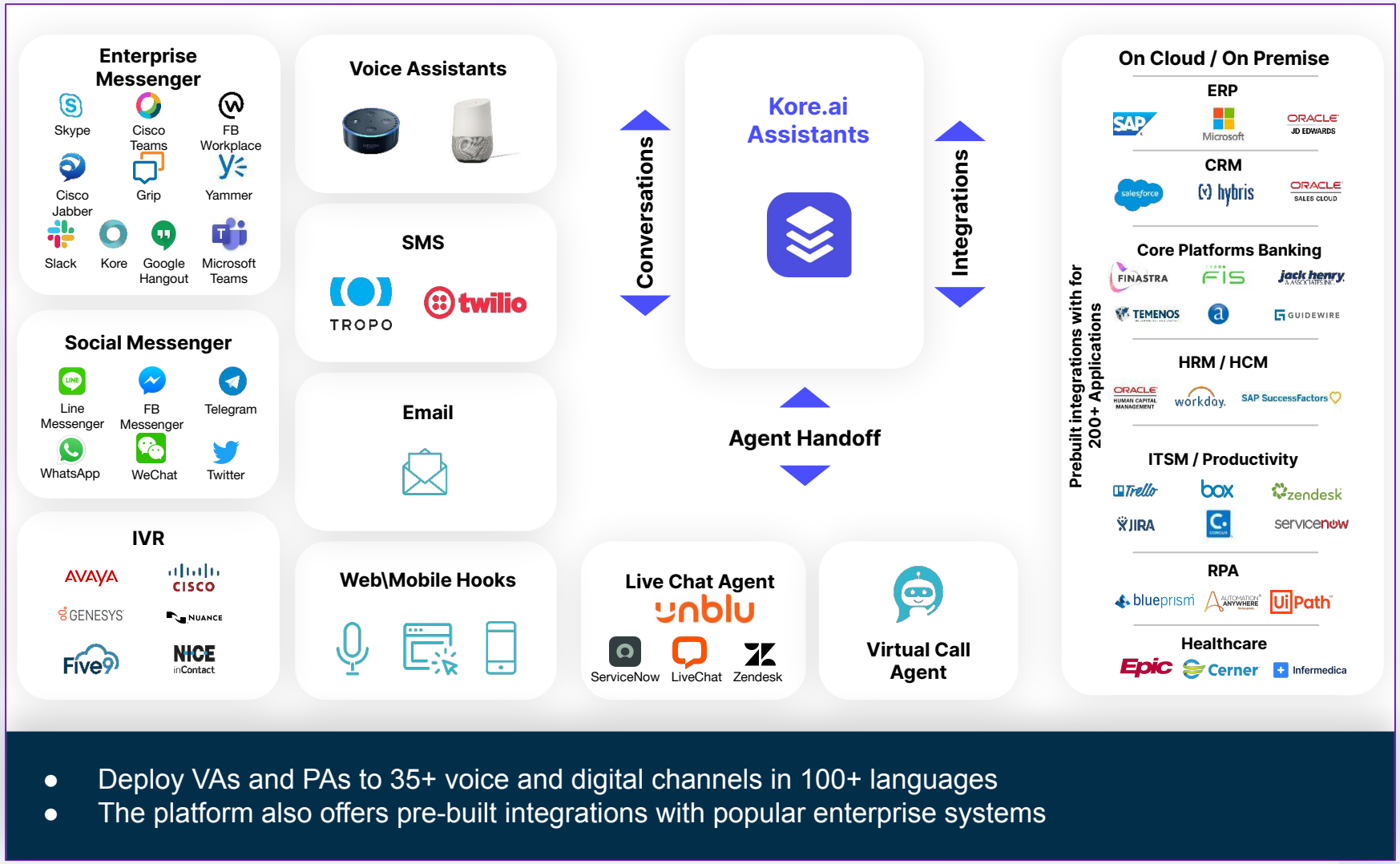
- State-of-the-art AI with Machine Learning + Fundamental Meaning + Knowledge Graph Models
- Results in higher intent recognition rate and less false positives

Innovative Capabilities to Enhance Development Experience

Delivering extraordinary experiences for customers, and employees, globally

Platform

- NO-CODE
- UNIFIED PLATFORM
- MULTI-ENGINE NLU
- **MULTICHANNEL**
- ANALYTICS



- Deploy VAs and PAs to 35+ voice and digital channels in 100+ languages
- The platform also offers pre-built integrations with popular enterprise systems

Innovative Capabilities to Enhance Development Experience

Delivering extraordinary experiences for customers, and employees, globally

Platform

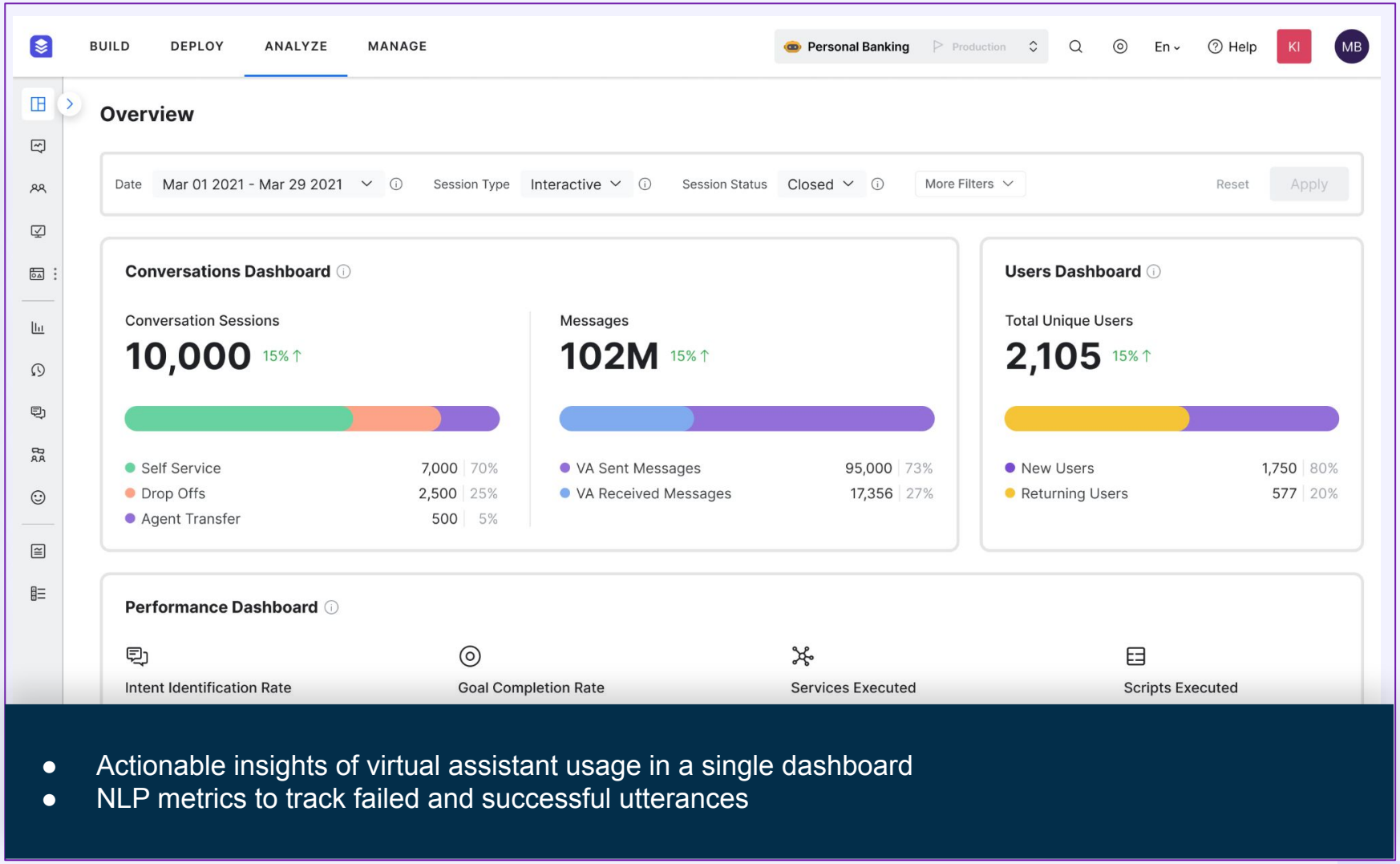
NO-CODE

UNIFIED PLATFORM

MULTI-ENGINE NLU

MULTICHANNEL

ANALYTICS



- Actionable insights of virtual assistant usage in a single dashboard
- NLP metrics to track failed and successful utterances

Optimize Customer and Employee Experiences

with the Kore.ai Product Suite

Platform

CX

BankAssist
200+ Pre-built Retail Banking Workflows

HealthAssist
Pre-trained Virtual Assistant for Patients

RetailAssist Coming Soon
Pre-trained Virtual Assistant for Retail

TravelAssist Coming Soon
Pre-trained Virtual Assistant for Travel

EX

HR Assist
Pre-trained Virtual HR Assistant for Employees

RecruitAssist Coming Soon
Pre-trained Virtual Assistant for Employee Recruitment

IT Assist
Pre-trained Virtual IT Assistant for Employees

SalesAssist Coming Soon
Pre-trained Virtual Assistant for Sales Teams

ProcureAssist Coming Soon
Pre-trained Procurement Virtual Assistant for Employees

Accelerators	Apps	Templates

SmartAssist AI-native CCaaS Platform

ASR/TTS | Experience Flow Designer | AI Routing | Agent Desktop

AgentAssist AI-native AX Platform

Next Big Action Suggestion | Action Fulfillment | Suggested Response | Agent Search Assistance

WorkAssist AI-native EX Platform

Table Apps, Views & Dashboards | Context based Collaboration | Conversational AI with Kora | Cognitive Search

SearchAssist AI Powered Conversational Search Engine

Federated Search & Chat | Synonyms & Context | Auto Suggestions | Filters & Facets | Weights & Ranking

Platform Experience Optimization (XO) No-Code Platform

Virtual Assistants		Process Assistants		Digital Apps	
Conversation Designer	Dialog Builder	Process App Builder	Voice AI	Knowledge AI	AI Driven Topic Modeler

35+ Channel Integrations | SDLC | Multi-Engine NLP | Analytics & Insights | Conversational Intelligence | Scalability | Analytics & Insights | Governance | Message Middleware | Enterprise Integrations

Highlights

- Conversational AI automation
  Full lifecycle management
- 35 interaction channels
  Retains context over time
- Easy, no-code orchestration
  Pre-package applications & integrations
- Full native CCaaS option
  Customer, Agent & Employee use cases

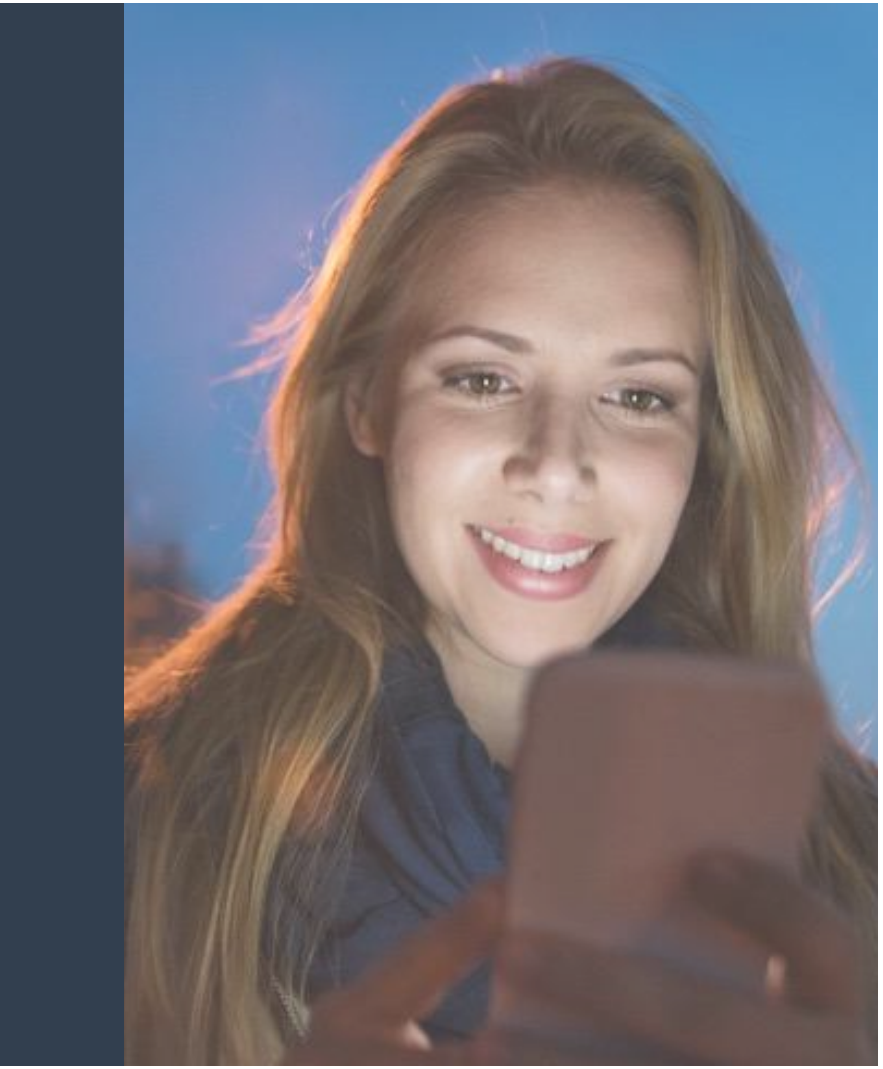
AI-powered Visual Assistants

Automate customer and employee interactions



Virtual Assistants are Redefining the Future of Conversations

Platform



Enhance engagement and build loyalty with AI-first Virtual Assistants

- **Ubiquitous** - Interact with anyone, anytime and anywhere
- **Conversational UI** - Supports Verbal and Voice commands
- **Contextual** - Remembers Context and Delivers Natural Experience
- **Omnichannel** - Deploy on multiple channels and languages
- **Proactive** - Send timely notifications and alerts
- **Self-learn** - Understands and learn from previous experiences
- **Higher EQ** - Identify emotions and transfers the interaction to live agents

Tooling & Capabilities to Manage the End-to-end Lifecycle

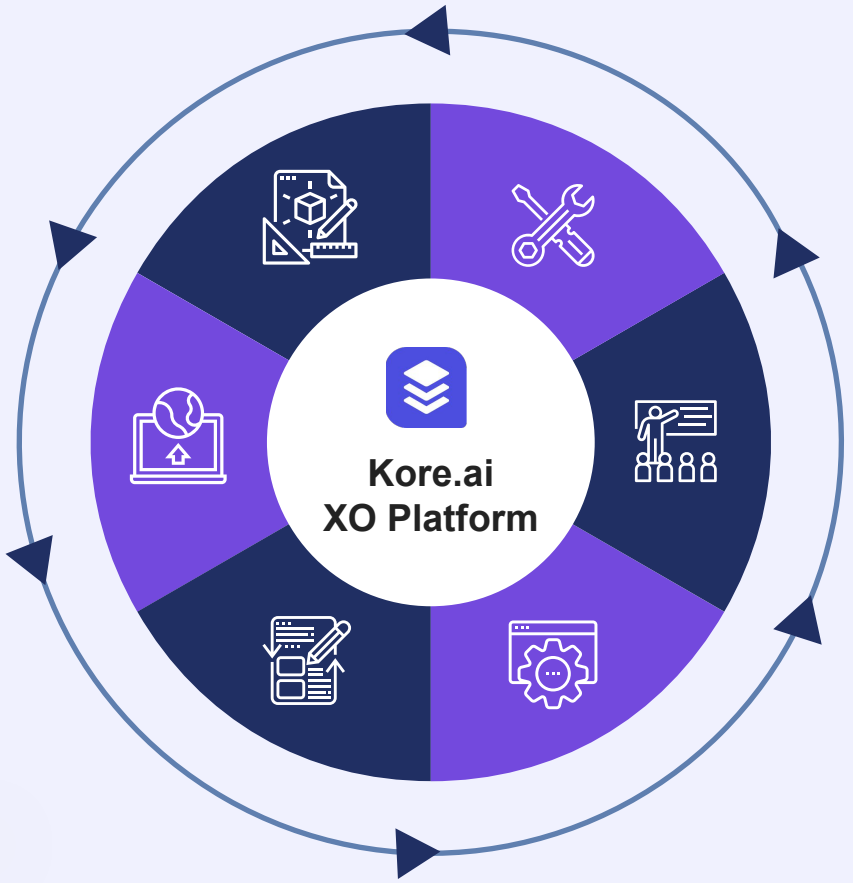
Platform

Build

Design
- Conversation designer
- Dialog Builder, Auto-discover intents and Knowledge Graph
- Digital views & Small Talks

Train
- Multi-Engine NLP
- Conversation Intelligence
- Explainable AI
- Context Management

Test
- Talk to bot
- Conversation regression testing
- Batch testing
- Utterance testing



Manage
- Enrollment, user management
- Roles and permissions
- Groups

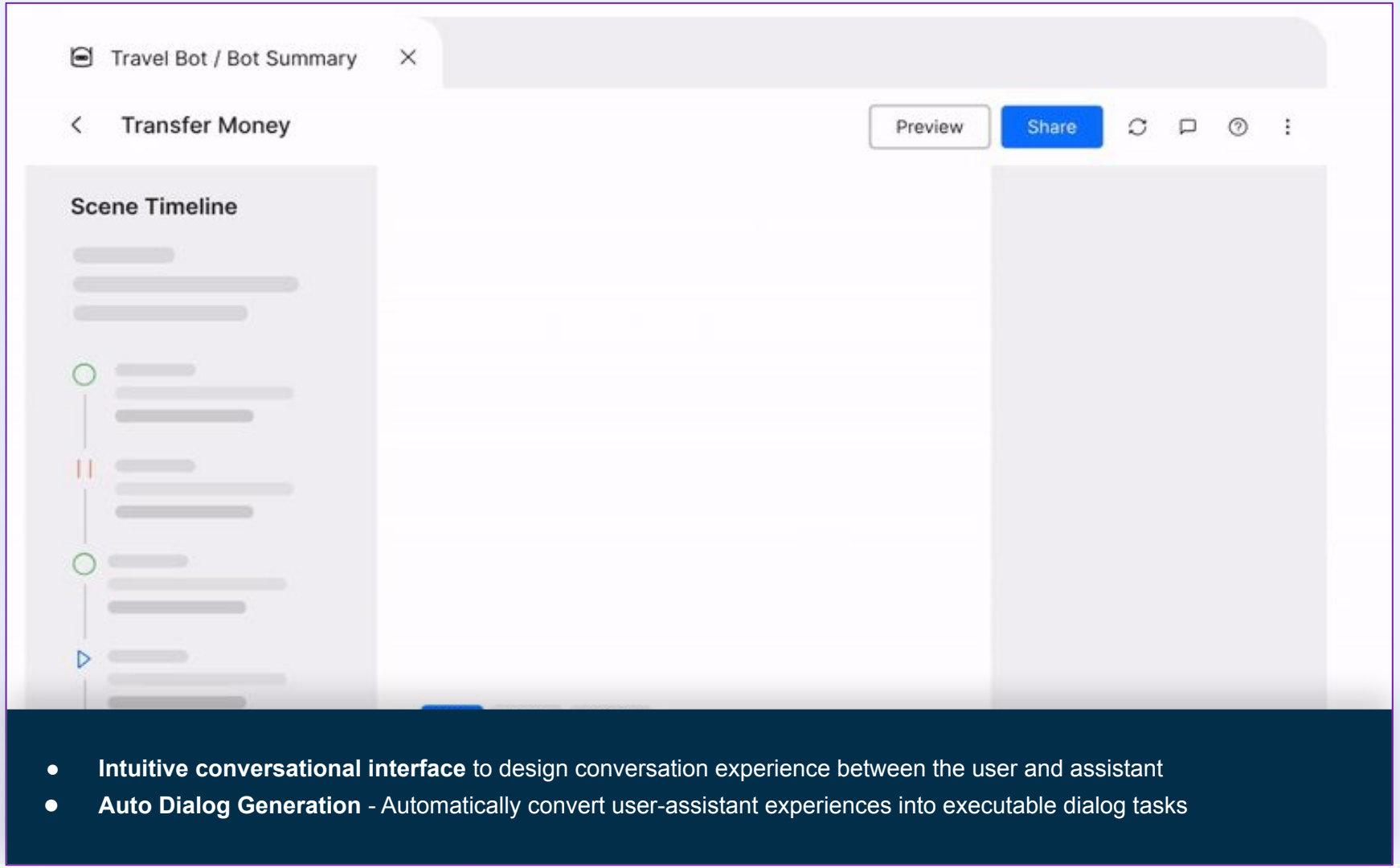
Analyze
- Containment + drop-off insights
- Virtual Assistant performance insights and dashboards
- NLP Metrics, Usage Metrics

Deploy
- 30+ pre-built channels + SDKs
- Supports 100+ Languages
- Pre-built workflows - Integrate with popular systems and tools

Design Human-like Conversations Using a Visual Designer

Platform

- **Conversation Designer**
- Knowledge Extraction
- Training & Testing
- Contextual Intelligence
- Voice Capabilities
- Pre-built Templates

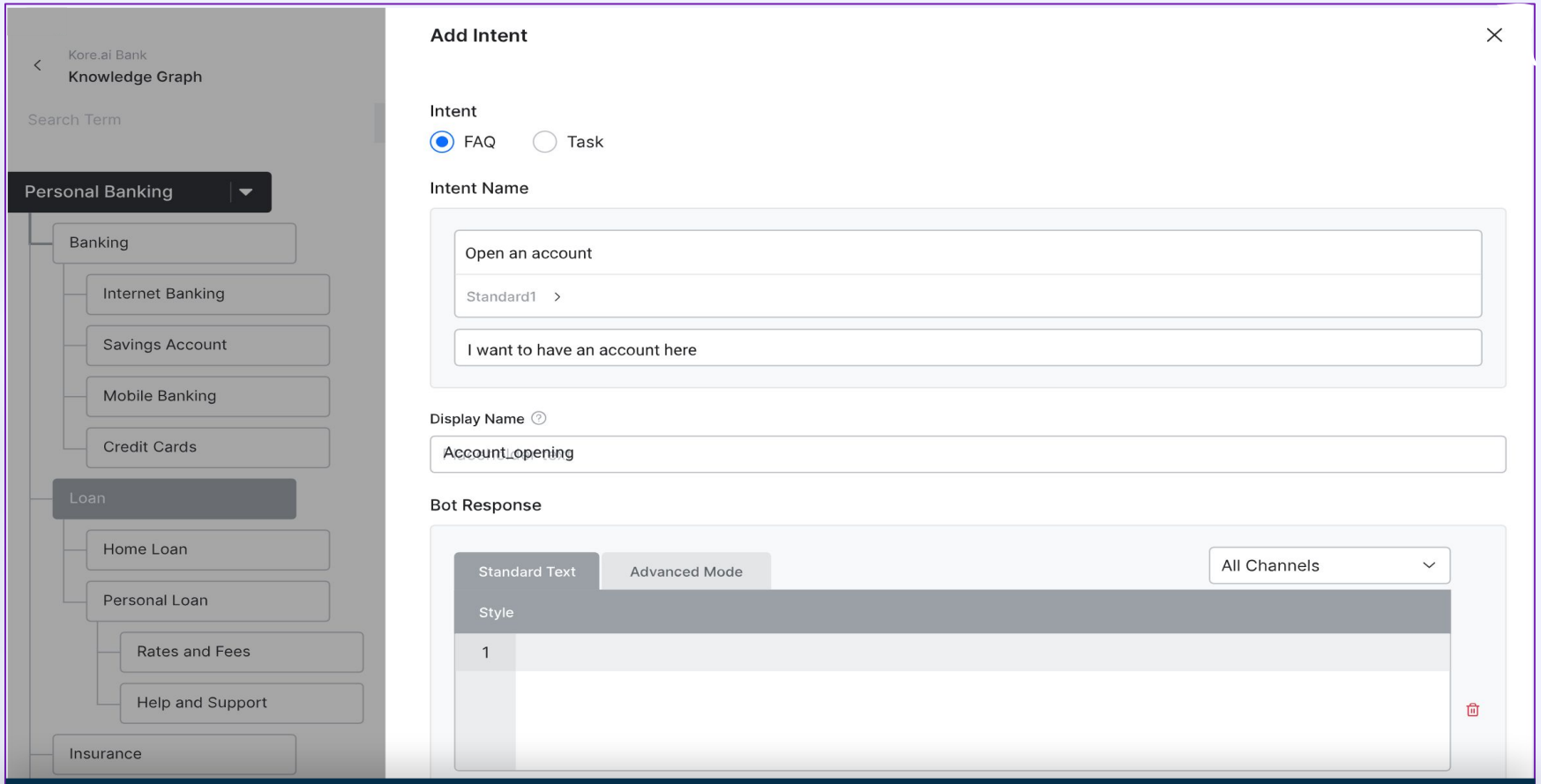


- **Intuitive conversational interface** to design conversation experience between the user and assistant
- **Auto Dialog Generation** - Automatically convert user-assistant experiences into executable dialog tasks

Elevate Your Existing Enterprise Knowledge Repository

Platform

- Conversation Designer
- **Knowledge Extraction**
- Training & Testing
- Contextual Intelligence
- Voice Capabilities
- Pre-built Templates

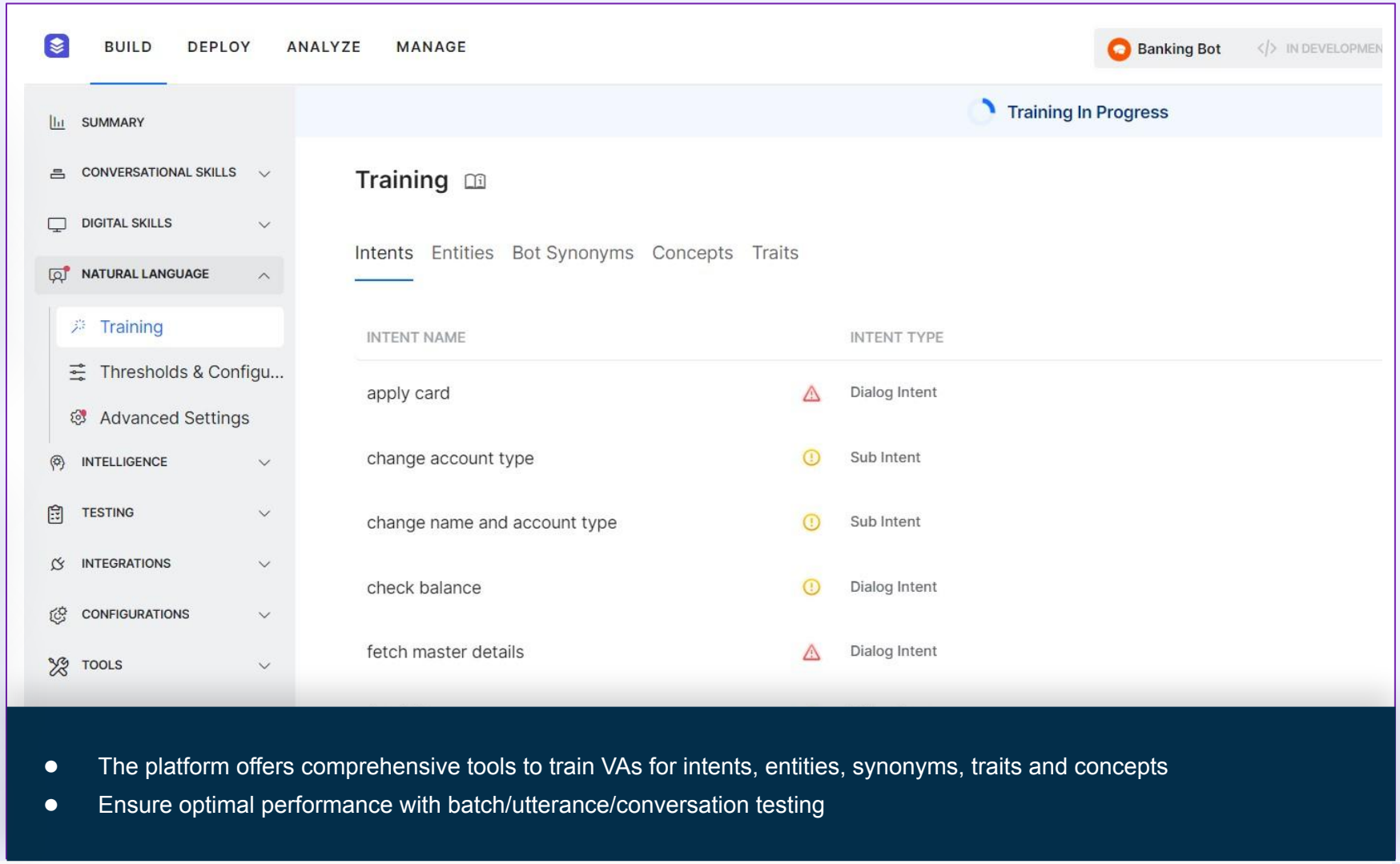


- Instantly build Conversational Experiences by processing the enterprise knowledge repository including PDFs, CSV, Webpages,Wiki and more
- Extract, annotate, train and publish the data to construct a knowledge graph

Enhance Performance with Best-in-class Training & Testing

Platform

- Conversation Designer
- Knowledge Extraction
- **Training & Testing**
- Contextual Intelligence
- Voice Capabilities
- Pre-built Templates



- The platform offers comprehensive tools to train VAs for intents, entities, synonyms, traits and concepts
- Ensure optimal performance with batch/utterance/conversation testing

Personalize User Interactions

Platform

- Conversation Designer
- Knowledge Extraction
- Training & Testing
- **Contextual Intelligence**
- Voice Capabilities
- Pre-built Templates



1. Uses contextual data from user input, API responses, and custom processed input
2. Handles and remembers context for recent conversations
3. Ability to carry context across intents and FAQ's.

Create Seamless Experiences Through The Voice

Platform

- Conversation Designer
- Knowledge Extraction
- Training & Testing
- Contextual Intelligence
- **Voice Capabilities**
- Pre-built Templates



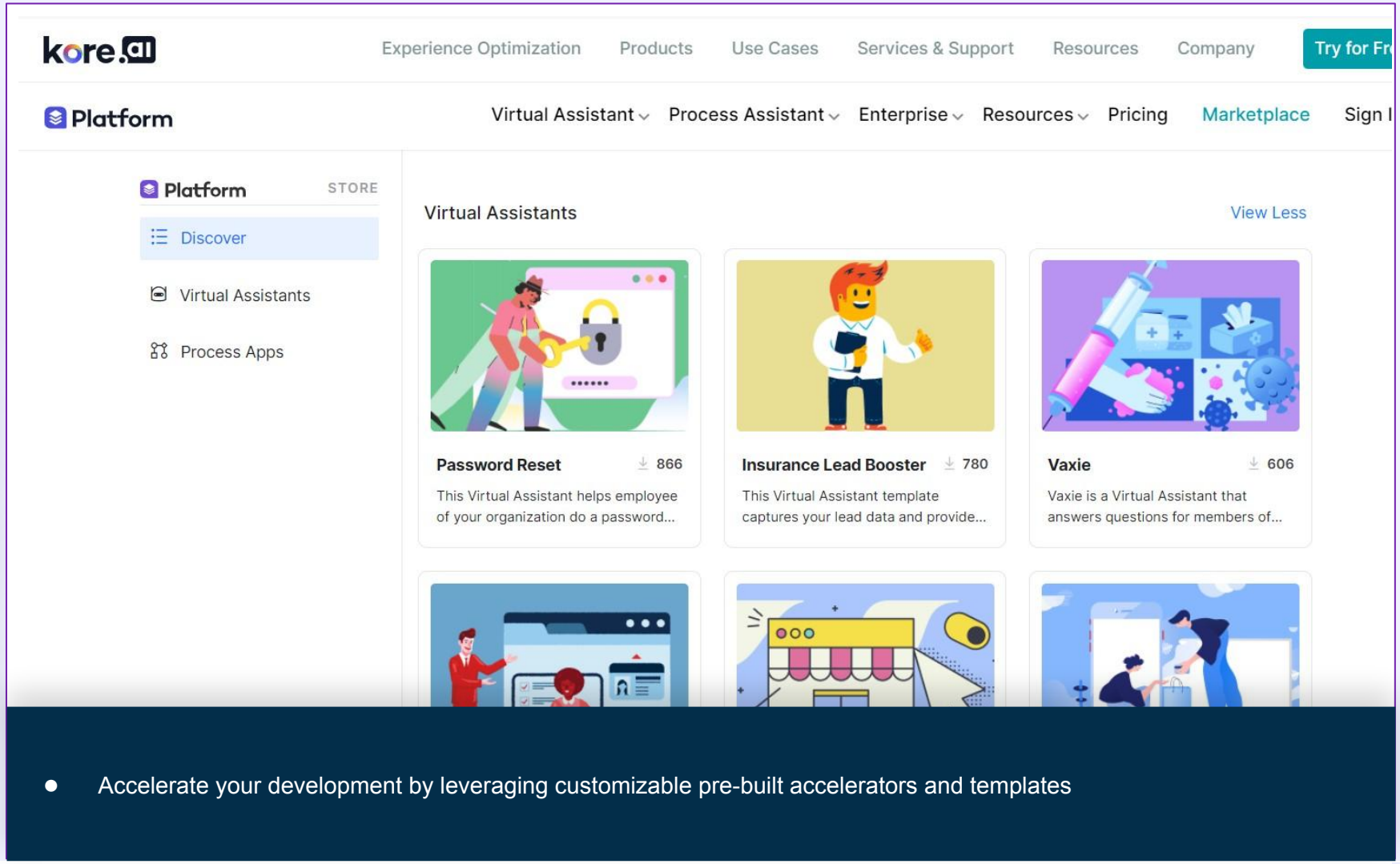
Play Video: IVR Banking

- Seamlessly integrate with popular voice channels,IVR systems, ASR and TTS tools
- Offer out-of-the-box integration with Alexa, Google, Genesys, Nuance, Cisco and more

Get a Head Start With Out-of-the-box Templates

Platform

- Conversation Designer
- Knowledge Extraction
- Training & Testing
- Contextual Intelligence
- Voice Capabilities
- **Prebuilt Templates**



- Accelerate your development by leveraging customizable pre-built accelerators and templates

Interact with Your Users in 100+ Languages

Platform

- Enable multiple languages without having to rebuild the virtual assistant
- Train in one language and the language-agnostic NLP models start interacting in over 100 languages
- The platform also allows you to build language-specific models for 25+ popular languages

Languages Supported

Arabic	English	Kazak	Slovenian
Bahasa	Finnish	Korean	Spanish
Brazilian	French	Malay	Tamil
Catalan	German	Marathi	Telugu
Dutch	Hindi	Polish	Ukrainian
Chinese Simplified	Italian	Portuguese	
Chinese Traditional	Japanese	Russian	

Click here to view the list of 100+ languages supported

About Kore.ai

8+ Years of Innovation-driven Growth

2014

Company Founded

Office in USA (HQ), UK, India, Japan, Korea

2015

Launched Enterprise Conversational Platform

In-house research and engineering

2016

Gartner Recognition

Diverse customer base in banking, telecom & healthcare

2018

Frost & Sullivan Global CAIP Award

Recognized as a leading CAIP by Gartner, IDC and Everest Group

2019

Raised Series B

Growing customer footprint in NA, EMEA and APAC

2020

Leader Position: Everest, IDC, ISG

Positioned as a leader in the IVA Peak Matrix

2021

Series C Raised 73.5M

Launched 4 New Products
SmartAssist, BankAssist, IT/HR Assist

New offices UK, JP, Korea

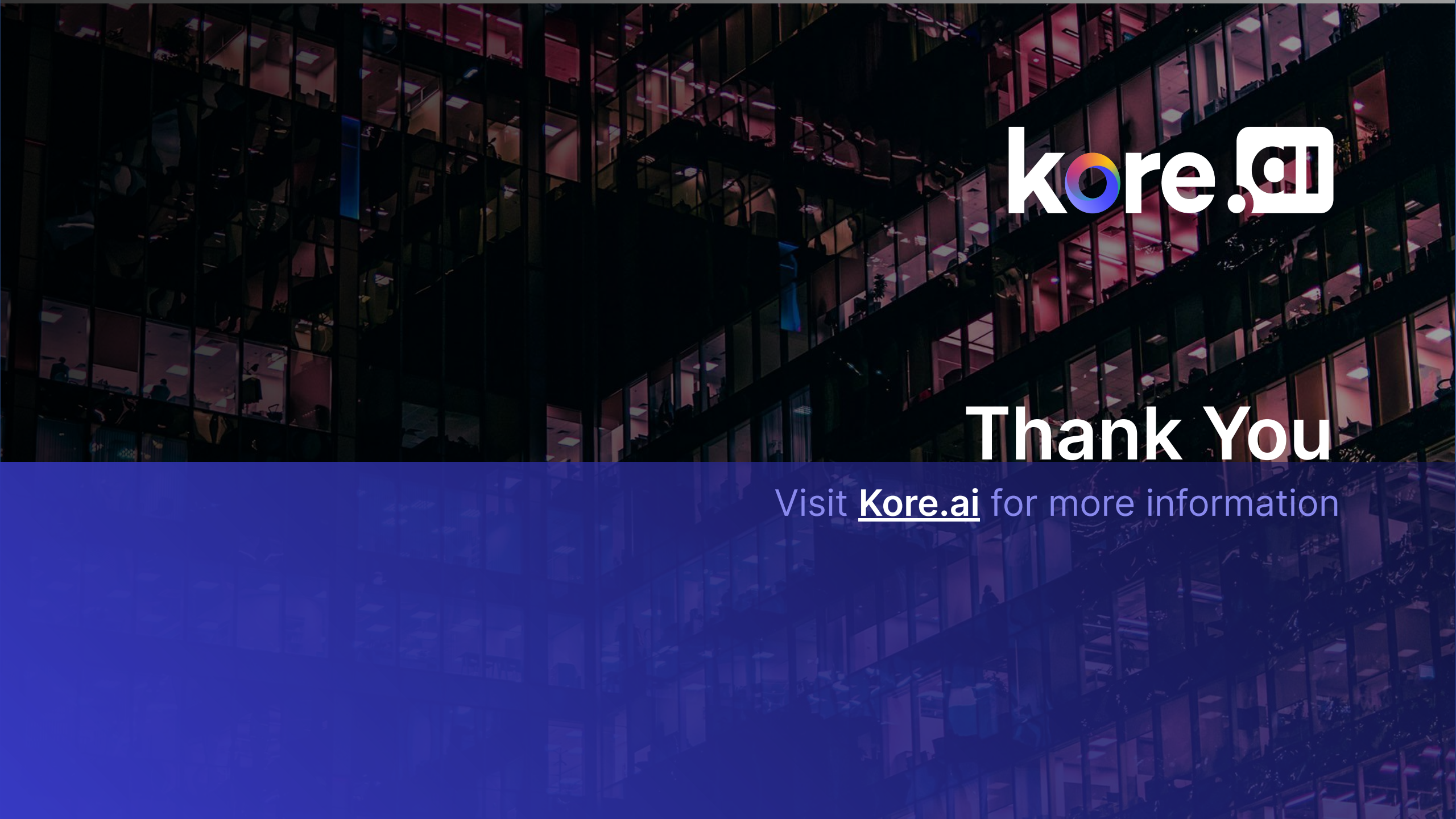
2022

Leader in the Gartner Magic Quadrant

- **Experienced Management Team**
  multiple IPOs in prior experience
- **Large Product Organization - 500+ Engineers**
- **800 Global Employees**
- **Global Footprint**
  with over 200+ Fortune 2000 customers
- **130% Consistent YoY Growth**

Start Your Journey With Kore.ai Today

The industry's most comprehensive, intelligent CAIP trusted by 1000s of customers globally


kore.ai
Thank You
Visit Kore.ai for more information

Customer Stories



IVR based Universal Assistant handles large inbound call volume

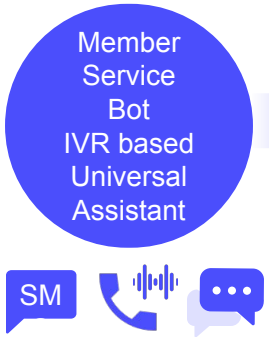
Voice based telephony with orchestration of multiple bots

- Contact center burdened with over **100M calls annually** from members seeking support
- **Members had to interact with multiple individual bots** to seek support for different queries. This was hampering experience and more likely **they request for agent support**
- Call center experienced **low containment rate**

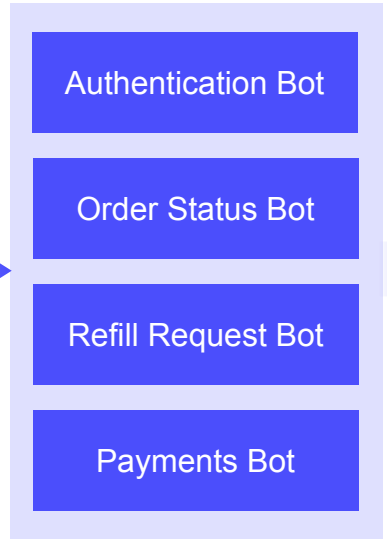
- Universal bot built on Kore.ai platform easily understands callers' intent, interacts with other bots as needed and seamlessly **handles multi-turn conversation to provide contextual responses** or can transfer to an agent with interaction history
- The bot takes up incoming calls and also runs outbound campaigns proactively for refill and status of their orders and payments

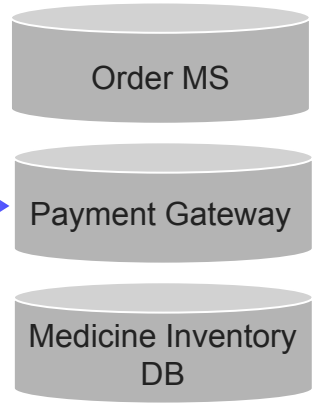


- Order status
- Refill prescription
- Change refill
- Payment









CUSTOMER WINS

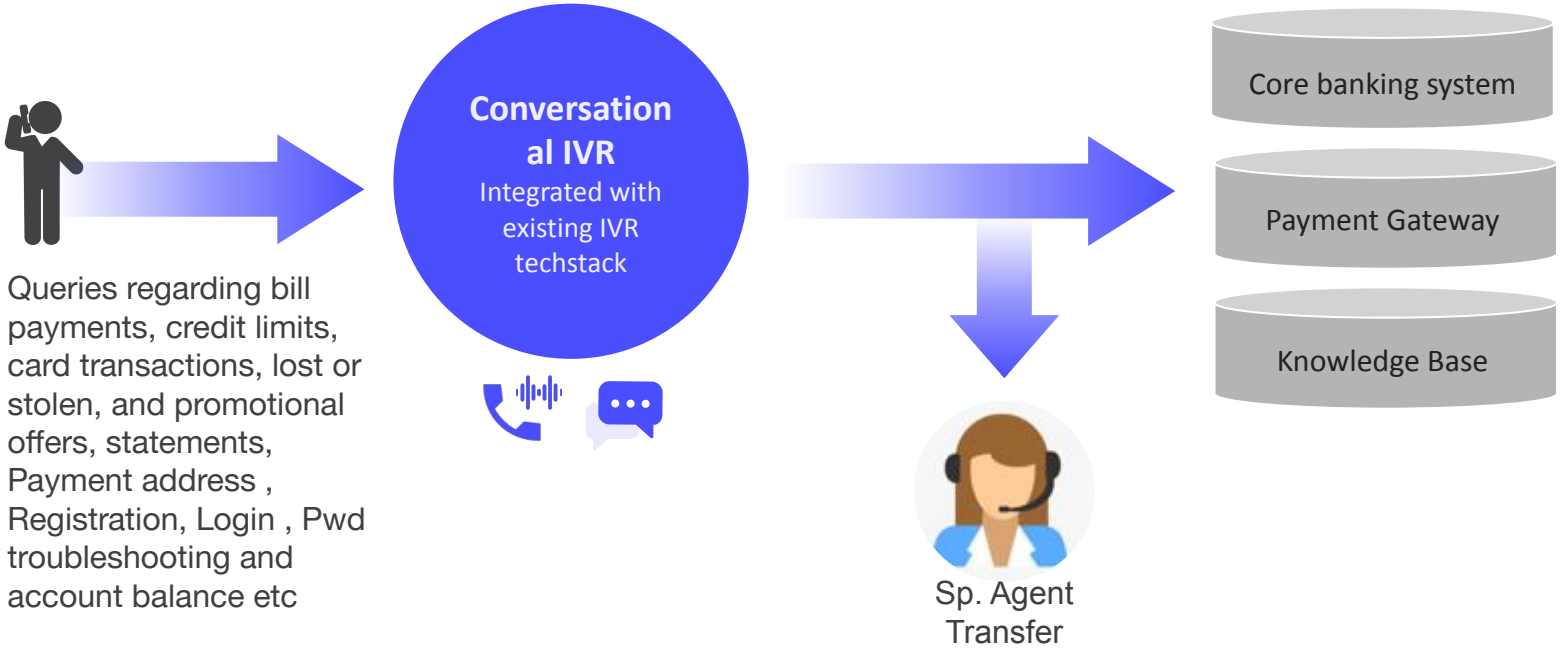
- IVR based universal assistant handles 100M calls annually, targeting 125M in next one year
- Universal assistant capable of handling Inbound calls as well as outbound campaigns.
- 8% increase in containment rate
- Expect to achieve $13M cost savings
- Retraining results in reduced maintenance costs

Conversational IVR system responds to customer queries

Large scale implementation / Complex dialogs

- 21 million calls per month for Citi credit card queries
- **DTMF based IVR system leads to a longer call duration and bad customer experience**
- **Costly upgrade and maintenance**

- Consumer Banking & Cards Conversational IVR virtual assistant built on Kore.ai platform **identifies caller intent and responds to caller's queries** or hands over to an agent
- Handles calls in **English and Spanish**
- Supports **100+ banking intents**
- User behaviour **analytics**



CUSTOMER WINS

~ 500,000 monthly calls handled at present

Vol expected to grow up to 250M in 1 year

~ 18% reduction in call duration due to conversational IVR

93% intent accuracy

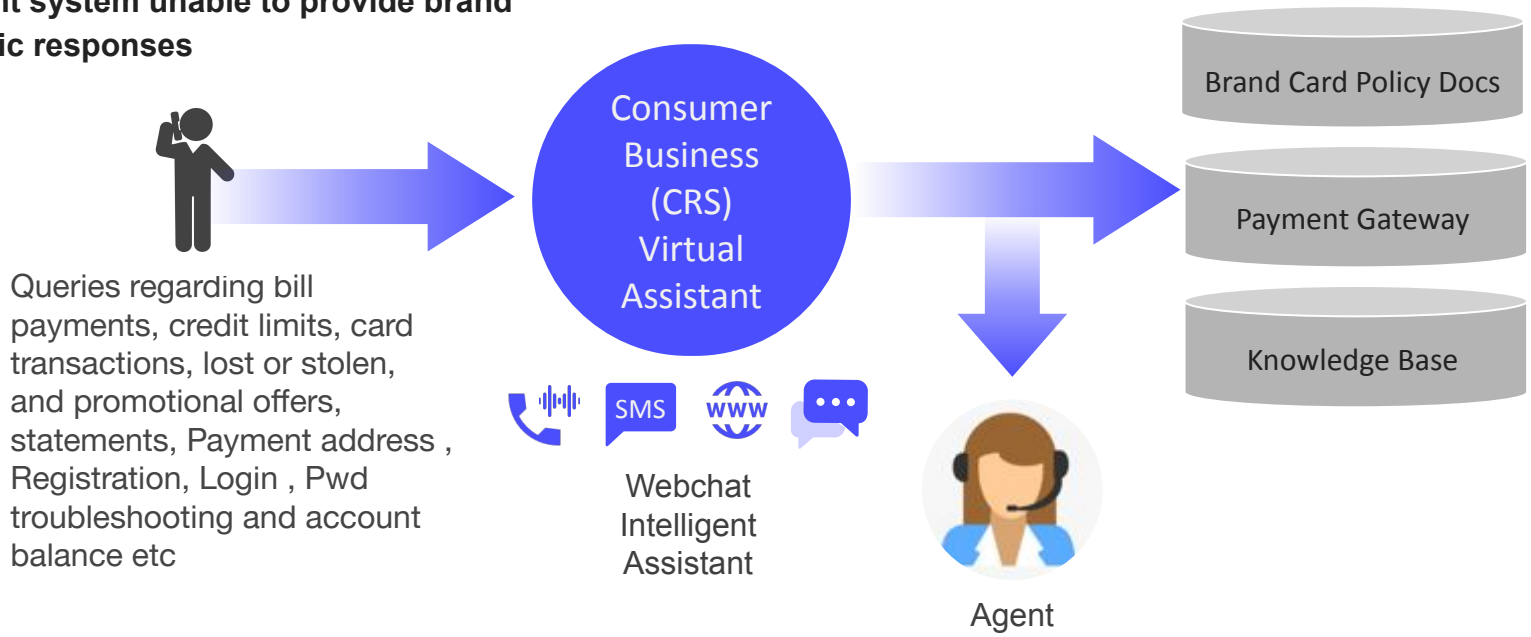
Seamless transition from legacy IVR techstack to conversational IVR

Digital Virtual Assistant provides brand specific customer service

Large scale implementation / Transaction based / Complex dialogs

- Citi's own credit card consumers and 65 million Consumer Business Credit Card customers from 40+ partner firms (Macy's, BestBuy, Home Depot)
- 25M monthly calls with volumes increasing 10-15% YoY
- **Increasing load on contact center was increasing operational cost** as all queries/ transactions were routed to live agents
- **Current system unable to provide brand specific responses**

- Consumer Response System (CRS) virtual assistant built on Kore.ai platform answers repetitive queries and transactions related to card limits, bill pay, lost/stolen, promo offers
- Provides **brand specific and personalized responses** on different channels



CUSTOMER WINS

IVR volume reduced by 22% YOY

90%+ containment rate with:

- 85% of transaction-based conversations are now automated with conversational AI
- 15% of customer engagements serviced with automated FAQs
- 8% of customers now make payments via SMS

Visual IVR assistant helps members with ID cards

Voice based telephony / Complex dialogs / Multimodal implementation

- Florida Blue **agents handle thousands of calls daily to help members in form fills** for requesting digital ID cards, look up PCP, get claims status, Bill pay.
- The members had to **wait too long in queue to get guidance on getting digital ID card** or to fill up basic forms.
- Visual interactive voice response assistant built on Kore.ai platform guides member with digital ID card, fill-up form, or get the claims status.
- Virtual Assistant interacts with member on **IVR and Webchat channels simultaneously.**
- **Interactive VA guides members on IVR while filling up the web form**



Queries regarding ID card, look up PCP, Bill pay, claims status, policy details

Visual IVR Assistant

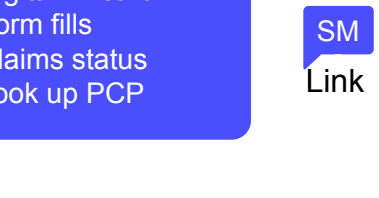
Cisco IVR, Nuance ATS

SM

English/Spanish

Visual IVR

- Digital ID card
- Form fills
- Claims status
- Look up PCP



SM

Link



Agent

CUSTOMER WINS

- Visual IVR handles over 2000 digital ID cards inquires daily
- 75% Customers opt for visual IVR option over live agent
- 1200+ ID cards dispatched daily
- 90% containment rate
- 3X reduction in waiting and resolution time
- Improved customer satisfaction. 94% customers provided Positive feedback.

Virtual Assistant automates enrollment and policy FAQs.

Transaction based conversations

- **450,000 calls** related to policy and payments during open enrollment period
- **Costly agents** were spending too much time **answering repetitive** queries
- **Lower call containment rate** resulting in lower productivity

- 'My Policy' virtual assistant helps customers with policy related FAQs and transaction related queries during enrollment cycle.
- Integration with Liveperson for seamless agent transfer
- Quickly scaled to answer specific queries during the COVID-19 pandemic



- Policy renewal
- Scheduling a payment
- Checking due dates
- Setting up Auto-Pay

My Policy Virtual Assistant

www

LIVEPERSON



Agent

Policy Docs

Payment Gateway

Knowledge Portal

CUSTOMER WINS

- 1000+ requests/day
- 50% call containment
- My Policy VA on website improved customer experience with FAQs
- Higher engagement on the website
- Easily scaled up during pandemic

Virtual Assistant provides customer care service for appointments & ops

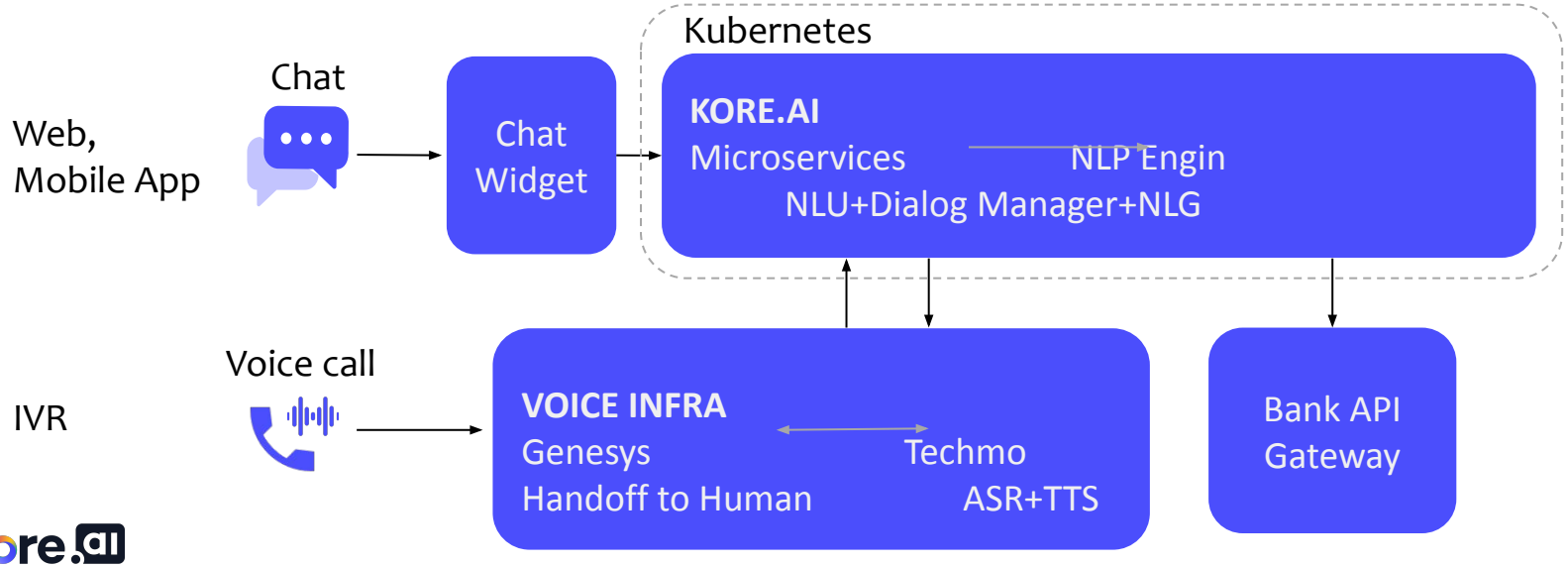
Transaction based conversations / Multibot

- Agents are overwhelmed with 400K inbound calls/month
- Bank's existing voice and chatbot solution is unreliable, fails at multiple instances, and leads to bad customer experience
- **Increasing load on contact center agents is increasing operational cost**

- Banking virtual assistant built on superior NLU XO platform with better intent recognition
- 15 voicebots and an intelligent virtual assistant
- Support both **Polish** and English languages
- Is available on web, mobile, IVR, and bank's intranet portal

Use Cases in scope:

1. Voice Inbound: Password Recovery, Card Block, Reset Card PIN, Password Unblock, Call Steering
2. Voice Outbound: Leads Validation
3. Chat: Money Transfer, Digital Access FAQs, Chat Steering



CUSTOMER WINS

1.2M voice and chat sessions per year are handled by the voice and digital chatbot solution.

15 Voice bots, 1 IVA
70%+ containment rate with:

- 70% of transaction-based conversations are now automated with conversational AI
- 80% intent recognition rate
- 7% reduction in customers inbound calls

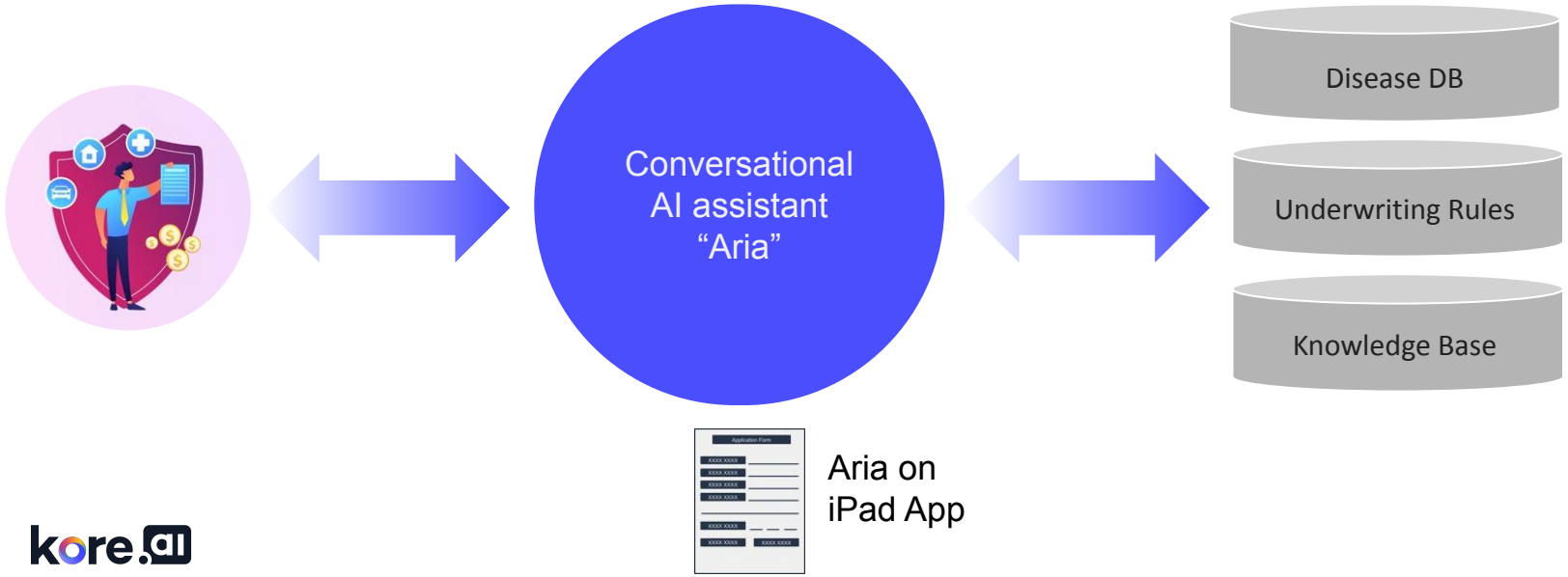
IVA helps in underwriting queries and recommendations

Transaction based conversations / Complex dialogs

- Rakuten Life's 4,000 insurance solicitors carry out sales activities nationwide using iPads as sales terminals
- Complicated and large amount of guideline judgments for insurance underwriting based on the matrix of disease and insurance type is a big hindrance in improving the proficiency of new employees and a bottleneck for veteran activities.

- Conversational AI IVA “Aria” is embedded in the Bank’s app on iPad.
- The IVA immediately responds to the customer's underwriting queries based on the customer's disease history.
- In the unlikely event that it is difficult to enroll in the desired insurance, Aria will also recommend (sales activity) insurance that can be enrolled to the recruiter.

Guidelines for underwriting
- General
- Addendum
- Corona



BUSINESS BENEFITS

- All 4,000 insurance solicitors use IVA to identify criteria for insurance underwriting
- 85% satisfaction rate
- 2X faster response time for underwriting questions
- Plans to expand to other operations (more than 1,000 FAQs, new policy guides)

Multiple virtual assistants answer employees queries

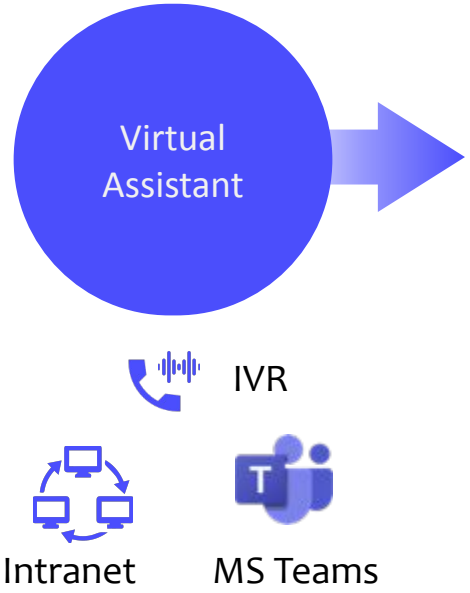
Orchestration of multiple bots

- **High volumes of low-value, repetitive queries** for HRBPs and IT helpdesk.
- **Employee Life Cycle management** along with enrollment period & appraisal cycles were **taxing limited HR staff.**
- Triaging issues with multiple applications over call was leading to average call duration of >15 minutes.

- Multiple virtual assistant built on Kore.ai platform helps answer these queries
- Available on intranet as self-service
- Integrates with **Informatica** and **ServiceNow**



Queries regarding onboarding, Password reset, Triage issue, Outage information etc.



CUSTOMER WINS

- Handles over 100,000 queries every year.
- ~90% containment rate
- 20% reduction in average handling time by the agents
- 20% reduction in the support staff workforce
- Resolutions time reduced from 15 mins to a few seconds

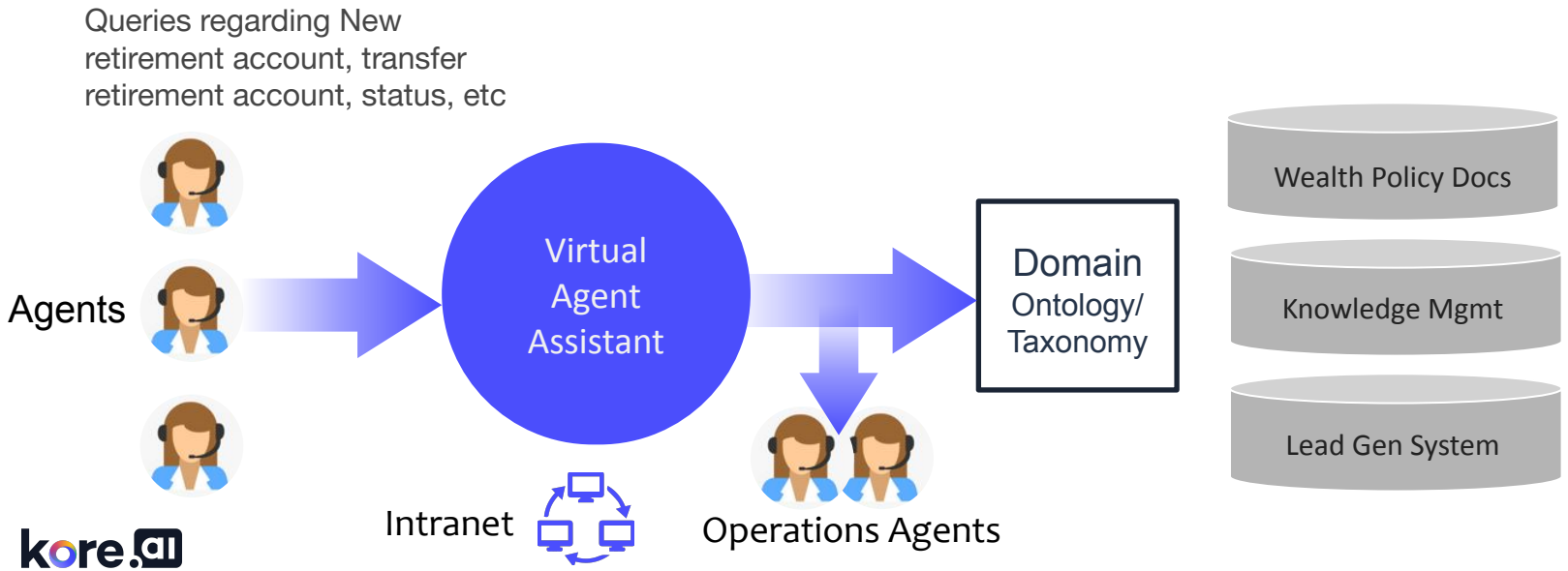
Intelligent Virtual Assistant helps Agents in answering queries

Complex dialogs / Transactional

Morgan Stanley

- Over 2000 agents busy serving clients on wealth management related topics
- Legacy homegrown agent support solution was difficult to improve and maintain
- **Even a small change request would be process intensive and would take 12-16 weeks to process**
- Very high development and maintenance cost - requires technically skilled resources

- Intelligent 'Agent' virtual assistant built on Kore.ai XO platform (On Prem Deployment)
- Full understanding of Wealth Domain Ontology/Taxanomy
- dynamic conversation flows that resolves partial user queries and smart disambiguation handling.
- Supports 3000+ FAQs, Tasks, Lead Generation and Escalation to operations team
- Reduced dependency over skilled technical resources and enabled rapid change implementation



CUSTOMER WINS

- Handles over 600,000 Search/Query sessions/year.
- 580,000 searches contained
- ~70% agents use assistant
- 12% reduction in average handling time by the agents
- 1M+ minutes saved since Jan '21
- 83% positive perception rate

kore.ai

Virtual Assistant provide guidance to procurement teams, globally

Transaction based multilingual conversations / Complex Dialogs

SIEMENS

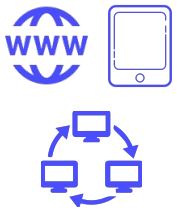
- Procurement helpdesk staff was spending too much time answering **repetitive queries from global teams**
- Purchase employees had to spend time in looking for right and recent info
- **Long wait time, lower containment rate resulting in delays in procurement decisions**

- An IVA was developed for SCM organization to provide 24X7 instant support for all **regional and global procurement queries**
  - on time
  - In their **preferred language (German, English, Spanish)**
  - relevant/ compliant to their region.
- Multiple SCM use cases are deployed under Global VA program. This VA offered guided flows, dialog tasks and FAQs for
  - Supplier qualification, Supplier management, Data catalog
  - Country specific queries and FAQs



- Supplier qualification
- Supplier management,
- Data catalog
- Majorly FAQs for different countries

Global Procurement IVA



Intranet

LIVEPERSON



Agent

- Policy Docs
- Payment Gateway
- Knowledge Portal

CUSTOMER WINS

- Within 6 months of go-live, there are over **6 global bots, over 23 child bots**.
- 80% Average goal completion rate
- ~73% Average containment rate
- ~75% Average intent identification rate
- 86% of the users have a given a good rating for the bot.

kore.ai

Universal bot provides quick resolution orchestrating multiple bots

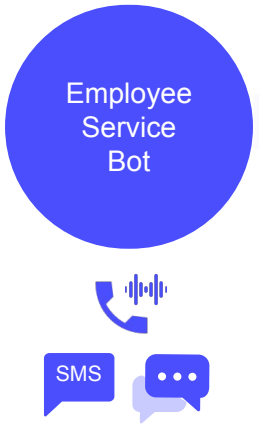
Multibot orchestration

- DB internal support staff experienced exponentially high call volume for HR, IT, Compliance, IT Ops related queries
- Different agents for different languages was operationally costly
- Agents unable to handle call vol lead to long wait times, lower productivity

- Five different IVAs build on Kore.ai XO platform. “Iva” for ITSM, “CatBot” for HR, “Carrie” for Compliance, “ITAOHelper” for IT Applications, and “Ria” for Credit Risk queries.
- Universal bot built on Kore.ai platform easily understands callers' intent, **interacts with other bots** as needed and seamlessly handles **multi-turn conversation** to provide contextual responses or can transfer to an agent with interaction history

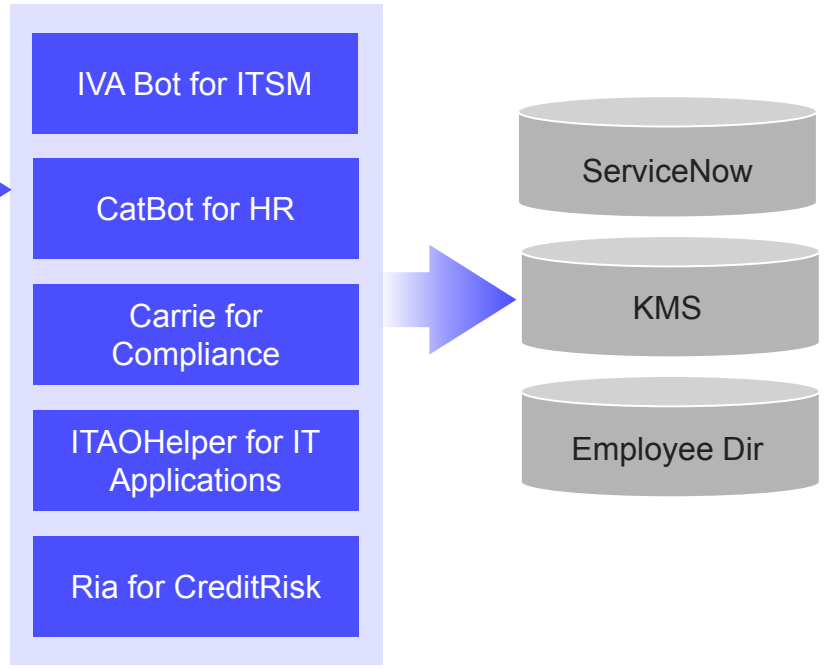


- HR Queries
- ITSM and ITAO
- Compliance
- Credit Risk





Agent



CUSTOMER WINS

- HR Bot alone consumed 10K sessions in 5 months
- 45% reduction in Agent deflection rate
- 70% increase in containment rate
- Resulted in **annual savings of $640K** and growing YoY

Appendix



Customers Choose Kore.ai for Our Superior Platform

Platform

No-Code

Drag and drop builder, OOTB support for 35+ Digital and Voice channels

Explainable AI

Tooling that provides deep understanding of NLU models and training

Choice of Deployment

On-premises, in the cloud or hybrid deployment

Open and Extensible

Seamless integrations with channel/app of your choice through APIs

Language Support

Build virtual assistant that interacts in 100+ languages

Multi-engine NLP

Higher intent recognition rate with less training

Contextual Intelligence

Human-like conversations with interruption handling and entity amendments

Universal Bots

Interact with multiple virtual assistants through a single interface

Conversation Analytics

Track the assistant performance in real-time with inbuilt dashboards and metrics

Enterprise-Grade

Multi-tenancy, enterprise security, audits, analytics and more

Chatbot vs Virtual Assistant

Platform

Chatbot

- Rule-based
- UI (Buttons) focused Interface
- Lack of contextual awareness
- Developer has to configure each and every response
- Chatbots cannot handle deviations within the conversation
- Fails to answer multiple queries in a single utterance
- Provide responses only in the defined language
- Performs better for FAQ kind of interactions

VS

AI - Virtual Assistant

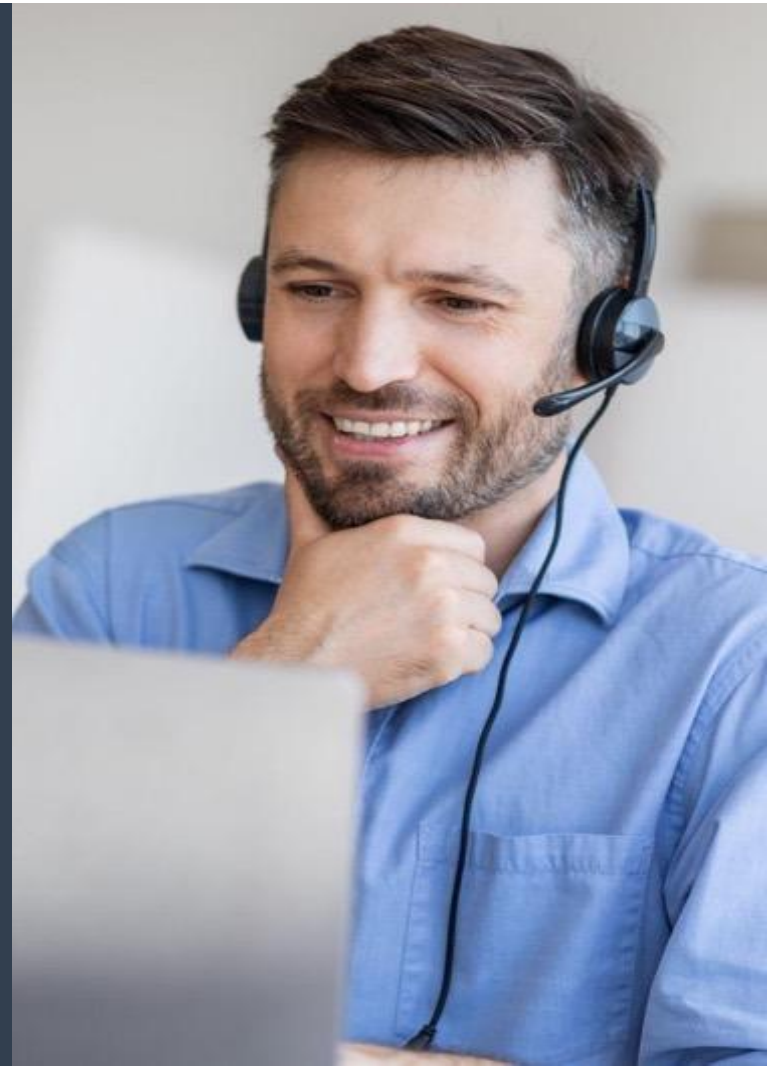
- Intelligent
- Conversational and Rich-UI Interface
- Understands the context and responds
- Leverages ML capabilities, understands from user responses and self trains
- Virtual assistants are good at handling multi-turn conversations with interruptions
- Virtual assistants dissects user utterances and identifies multi-intents
- Capable of understanding user language and respond accordingly
- Organizations leverage virtual assistants to automate front-office and back-office interactions

Voice Capabilities



Voice Capabilities Deliver Extraordinary Customer and Agent Experiences

Platform



Revolutionizing Contact Center Experiences with Platform's Voice capabilities

- **AI-Native Automation** - Automate up to 80% of customer interactions with Conversational AI-first Virtual Assistants
- **AI-driven Smart Routing -** With agent proficiency, affinity and priority aging
- **Integrate with popular agent platforms** like ServiceNow, Salesforce, Liveperson, Nice in Contact, Genesys etc.
- **Next best action based suggestions for Agents**
  - Ability to suggest the answers for the customer queries
  - Suggest relevant tasks based on the customer input and conversational context

Conceptual Architecture | Contact Center solution

Platform



AgentAssist Key Features

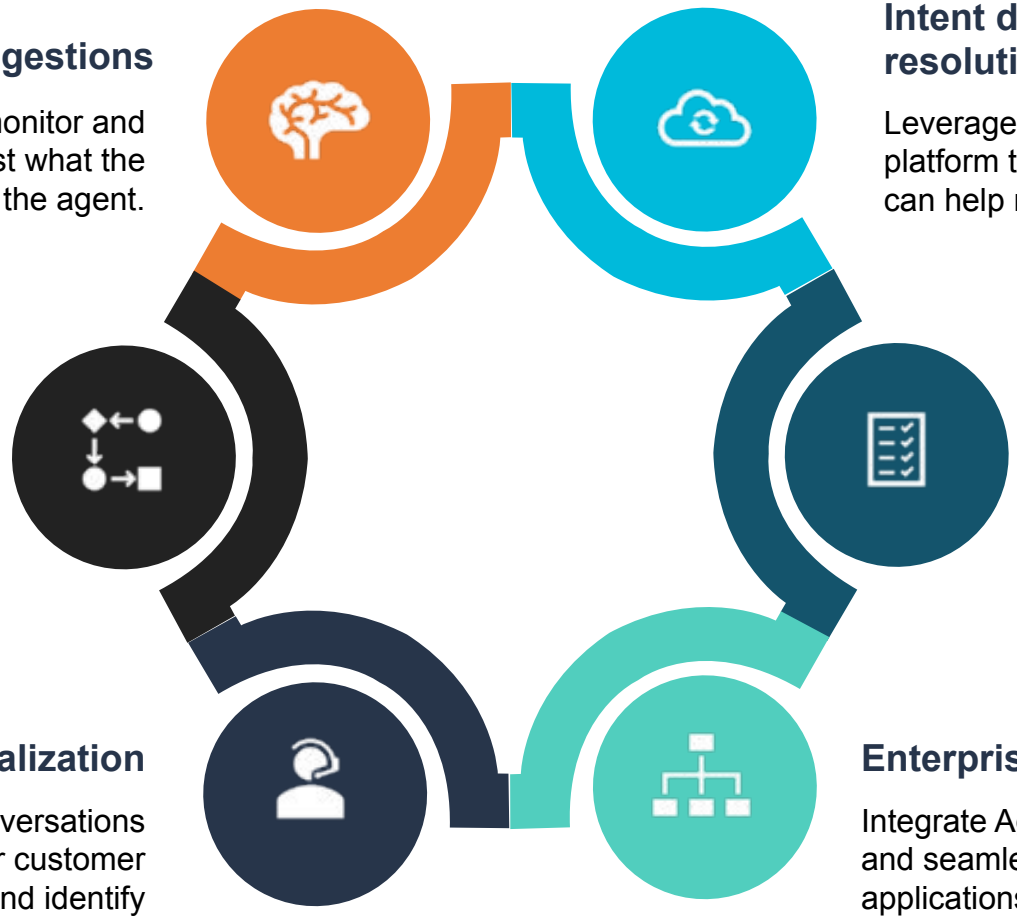
Platform

Next best action suggestions

AgentAssist can monitor and proactively suggest what the next best action is to the agent.

Intent detection and call resolution support

Leverage the Kore.ai conversational AI platform to build intelligence so AgentAssist can help resolve customer queries.



Agent training and empowerment

Help agents be the best they can and give them the tools to feel confident in their job with reply suggestions, sentiment monitoring and more.

Multi-modal engagement

Agents can submit queries to the VA or have it automatically listen in to a conversation, supporting agents end-to-end in the conversation

Scalable personalization

Personalize agent conversations to provide a better customer experience and identify opportunities for upsell

Enterprise system integration

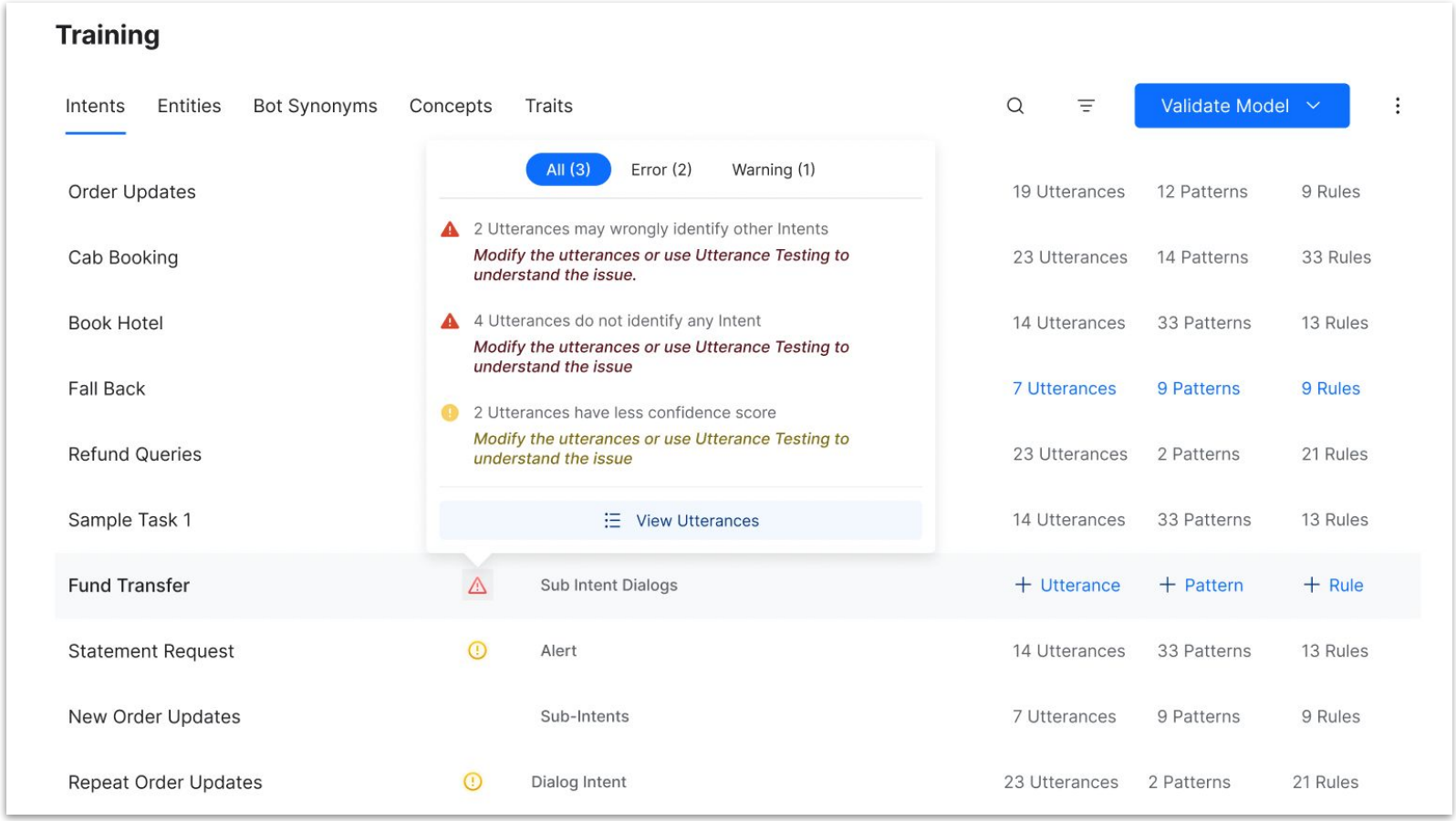
Integrate AgentAssist into backend systems and seamlessly surface information, launch applications, run RPAs and more.

Multi-Engine NLU



Proactive NLU Validations

- Enhance the virtual assistant training by offering proactive warnings and suggestions
- Simplified experience for Intent and Entity detections
- Identifies untrained Intents or intents with inadequate training
- Predicts the expected intent with low confidence



Multi-Engine NLU for Delivers Superior Intent Recognition



Fundamental Meaning Engine

Fundamental meaning to analyze the structure of a user's utterance to identify words by meaning, position, conjugation, capitalization, plurality and other factors



Machine Learning Engine

Machine learning that uses state-of-the-art algorithms and models



Knowledge Engine

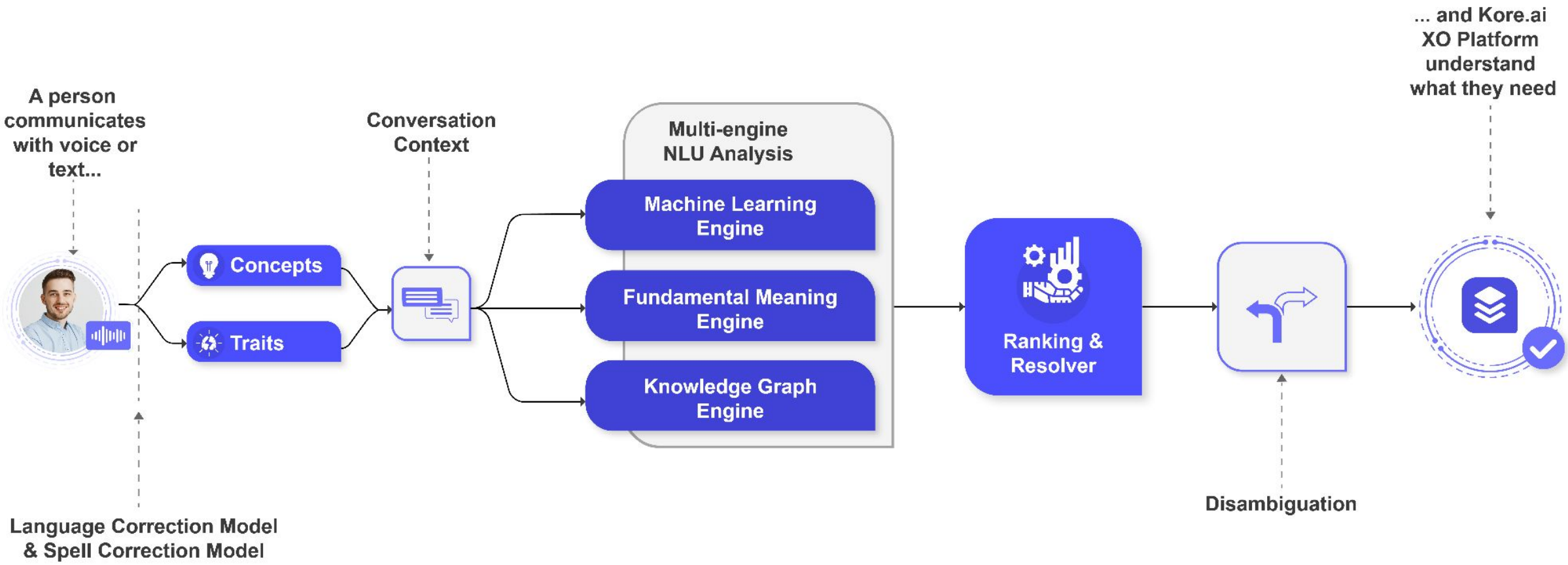
Knowledge graph, which provides the intelligence required to represent the importance of key domain terms and their relationships in identifying user's intent



Ranking & Resolver Engine

Ranking and Resolver - engine is used to determine the winning intent based on the user utterance. The winning intent between the engines is ascertained.

Higher Accuracy with Multi Engine NLU (ML+2 NLP Approach)

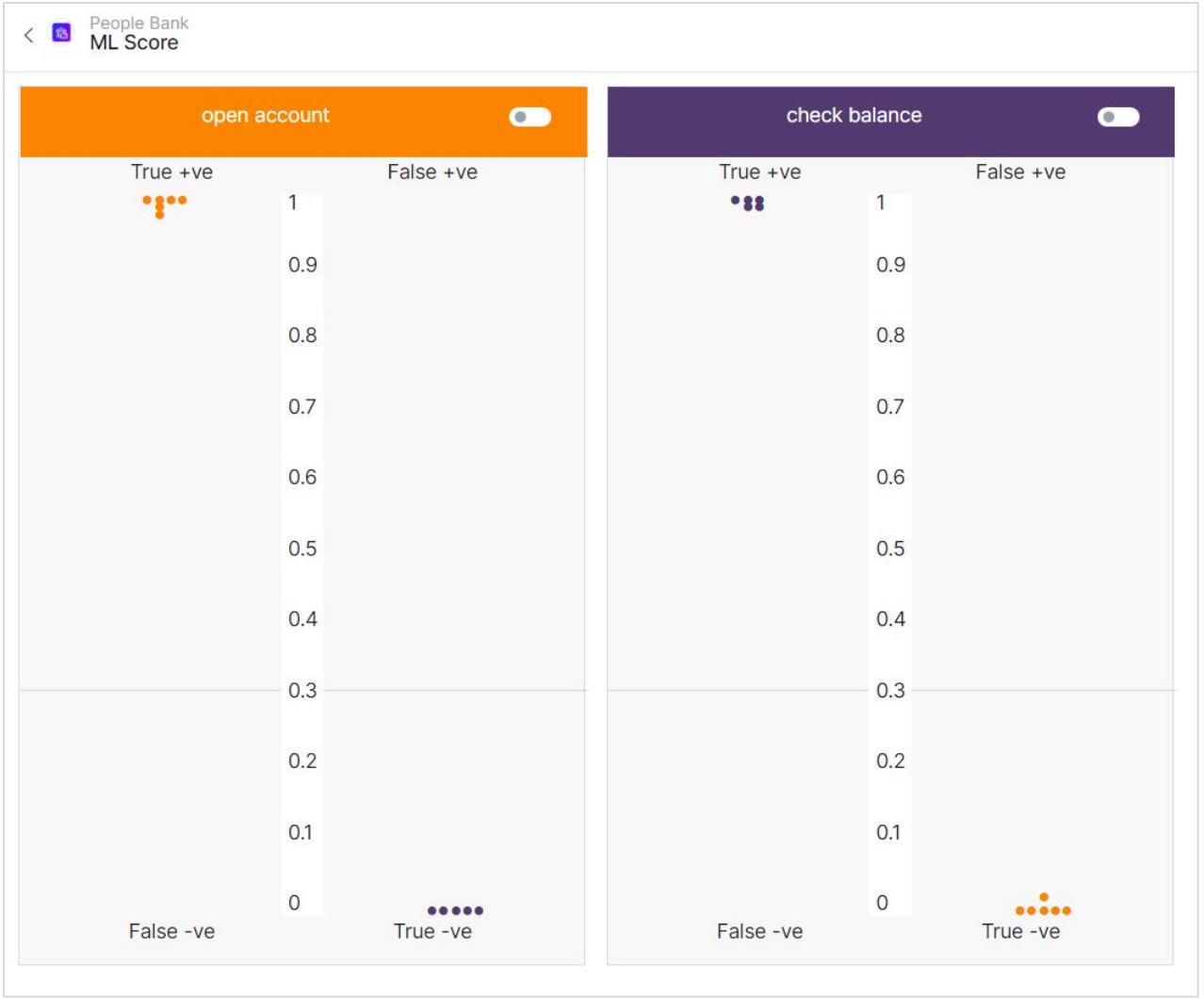


Advantages of Multi-Engine Approach

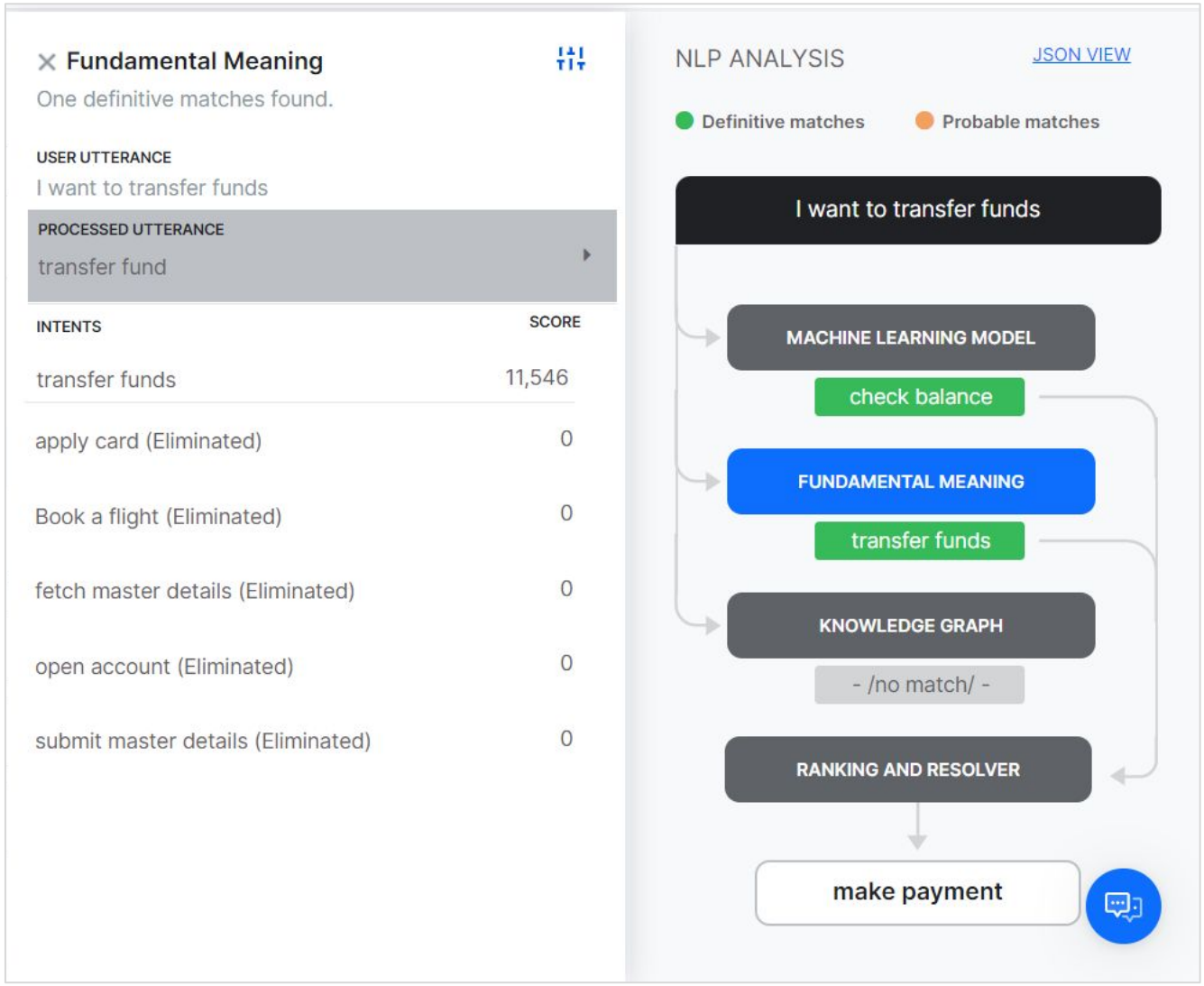
Key Features	Machine Learning Model	Fundamental Meaning Engine	Knowledge Graph Engine	Multi Engine Approach
Learning based on example training utterances	Yes	✗	Yes	Yes
• Use of term roles (subject, object, verb) • Use of canonical forms • Identify each word by meaning, punctuation, position, verb conjugation, capitalization	Partial	Yes	-	Yes
Minimal Training using task names, synonyms, & patterns	✗	Yes	-	Yes
Deterministic intent recognition	✗	Yes	-	Yes
Fewer False Positives	✗	Yes	Yes	Yes
Decisions based on domain term priority and relationships	✗	✗	Yes	Yes

Machine Learning (ML) Engine

- Operates **statistical modeling** and **Neural networks** to train an intent prediction model
- Uses **conditional random fields** for **named entity recognition (NER)** and extraction
- **Multiple text classification** features, including n-grams, entity marking, lemmatization and others for superior intent recognition
- Supports **supervised** and **unsupervised learning**
- Visualize and fine-tune the models for optimal results



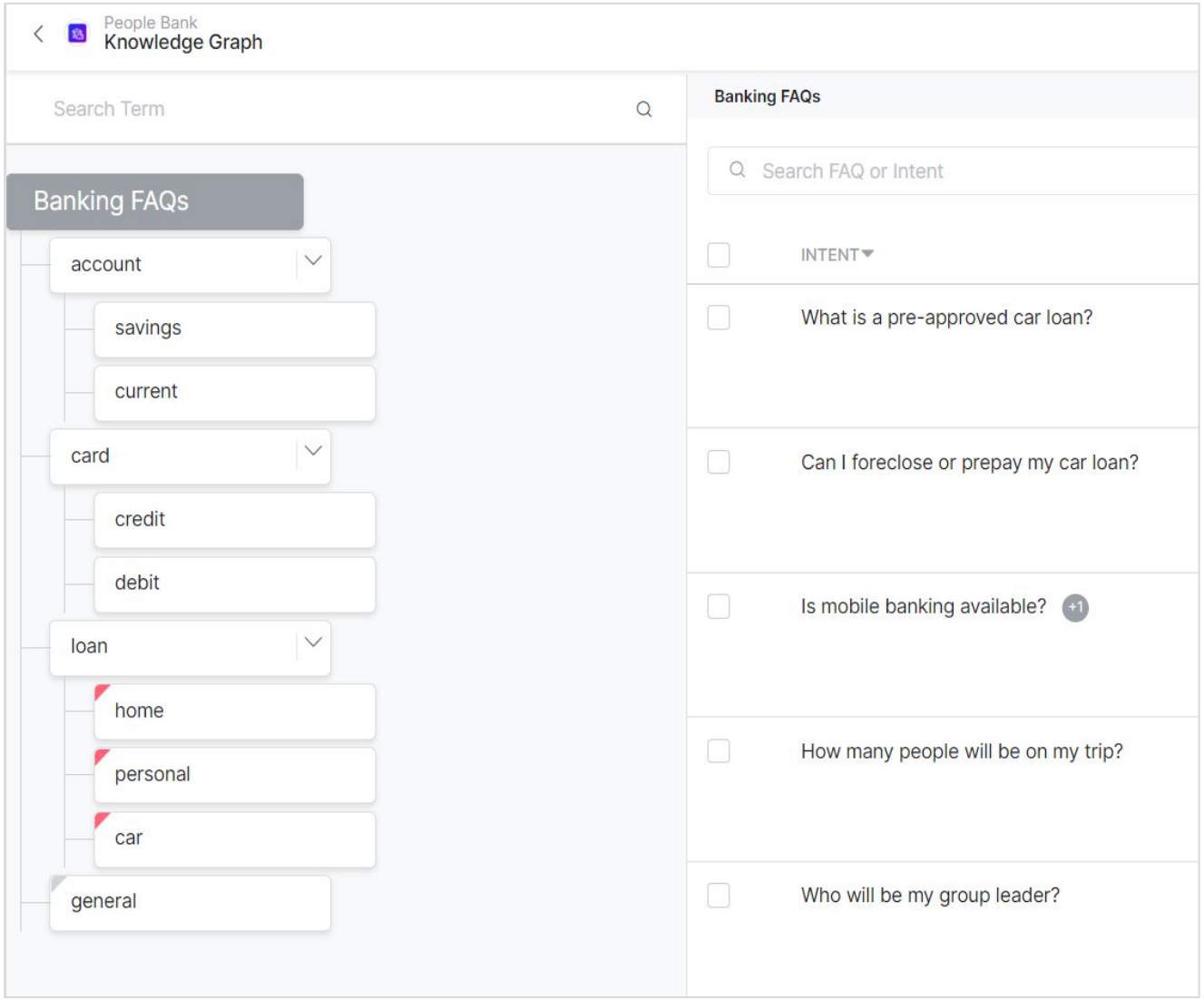
Fundamental Meaning (FM) Engine



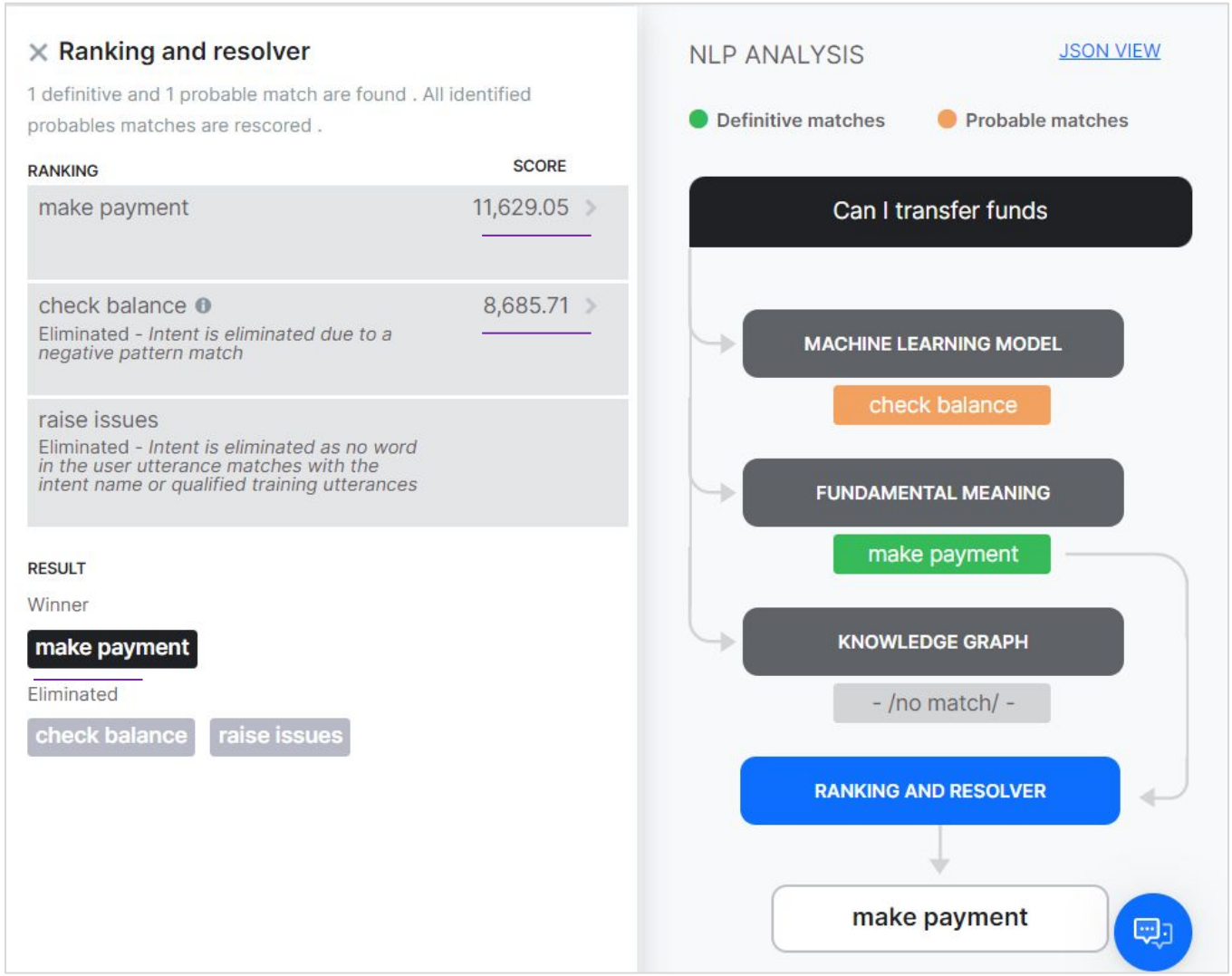
- FM model is a deterministic model that uses semantic rules and language context to determine the intent match
- Add synonyms and patterns to train the engine
- The FM model scores using various semantic rules including:
  - Grammar
  - Parts of speech
  - Word Match, Work Coverage, Word Position
  - Sentence structure and many more

Ontology-Based Knowledge Graph (KG) Engine

- **Turns static FAQ** text into an intelligent, personalized conversational experience
- Build ontology using **domain terms and relationships**
- Enables the ontology weighted features whenever ML gets confused
- **Knowledge Graph Generator** can extract key terms, define hierarchy and build the Knowledge Graph (KG) quickly
- **Knowledge Graph Analyzer** reviews and suggests changes for KG



Raking & Resolver Engine



- **Determines the best possible** intent match based on the scores from all the NLP engines
- Ranks each NLP engine as **Definitive match vs. Possible match**
- In case of a non-conclusive match, a disambiguation dialog is triggered

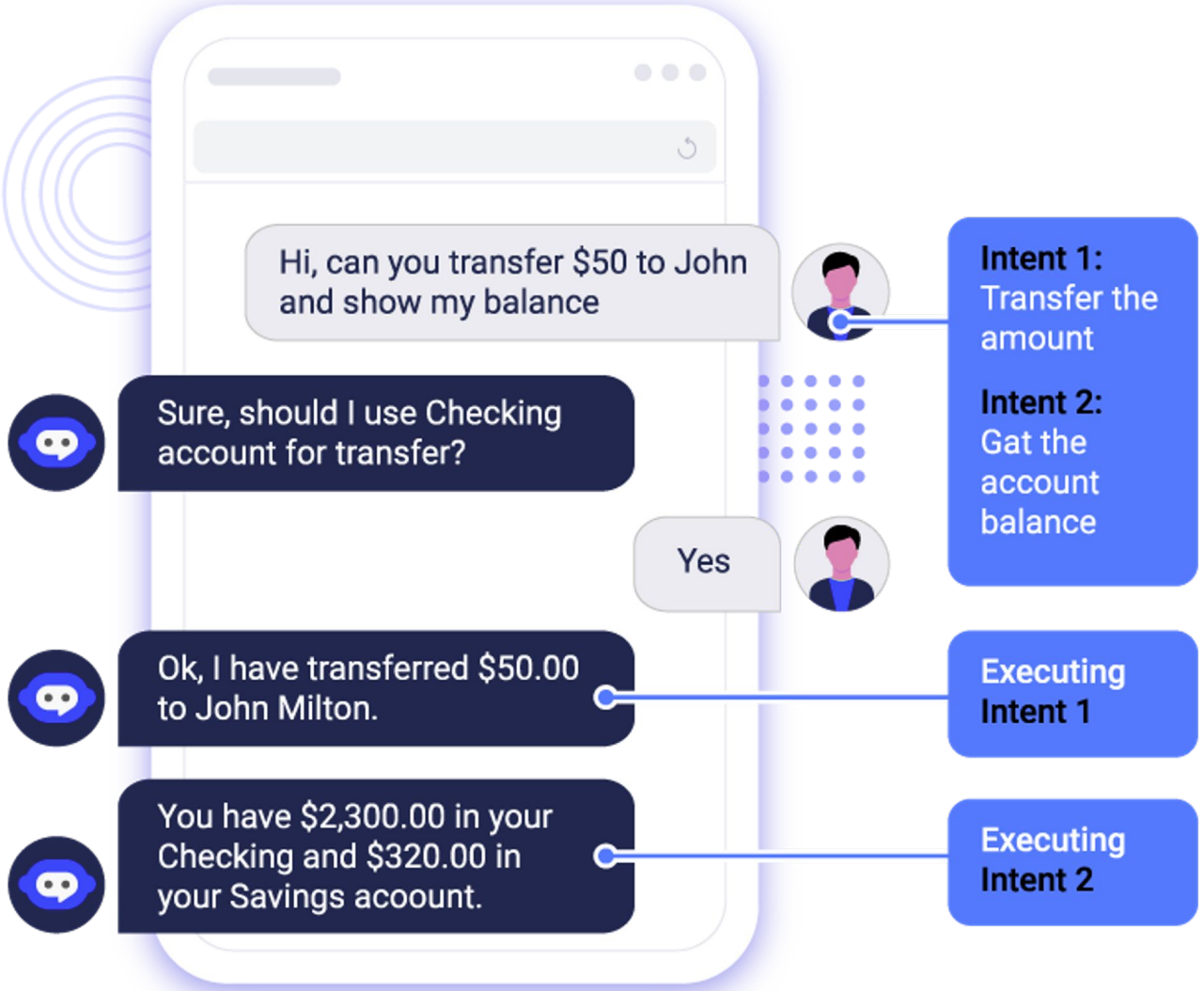
Dialog Turn Capabilities



Multiple Intents

Platform

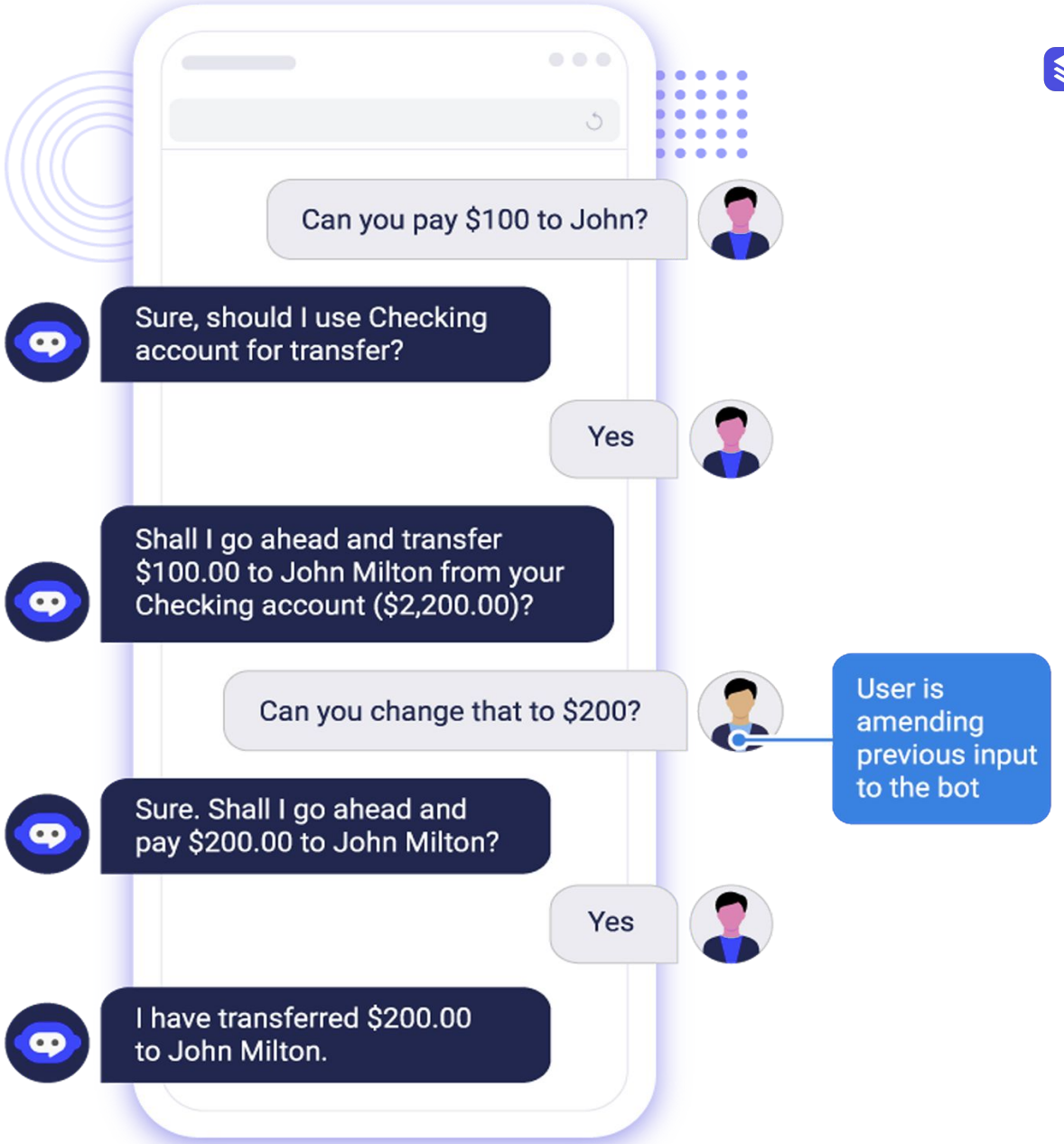
- Complex conversations are all about multiple intents
- Identifies and order the multiple intents expressed as part of a conversation
- No other platform can handle Multiple intents at the dialog management layer



Amend Entity

Platform

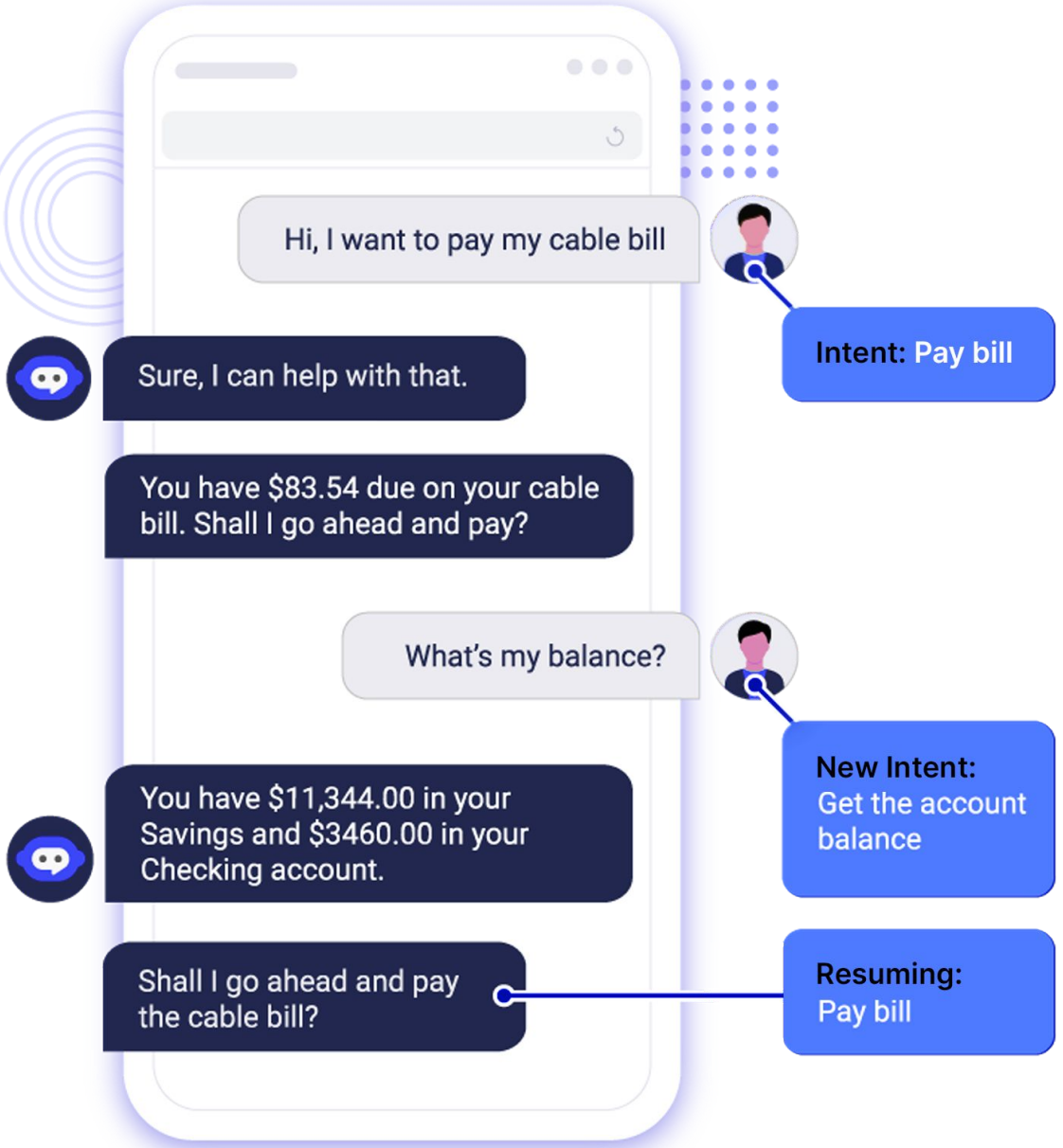
- User conversations are dynamic with multiple intentions in the single utterance
- Automatically amends entity value during a conversation, without developers writing a single line of code
- Allows users to amend entity values anytime during a conversation



Interruptions Handling

Platform

- Allows users to
  - Hold the current task
  - Start another task
  - On complete, resume the original task
- Handles the intricacy of complex conversations and interruptions
- Granular control of hold & resume at virtual assistant, task and node level
- Conditional exceptions between tasks with the ability to pass contextual data
- Control context switching rules and configure possible behavior

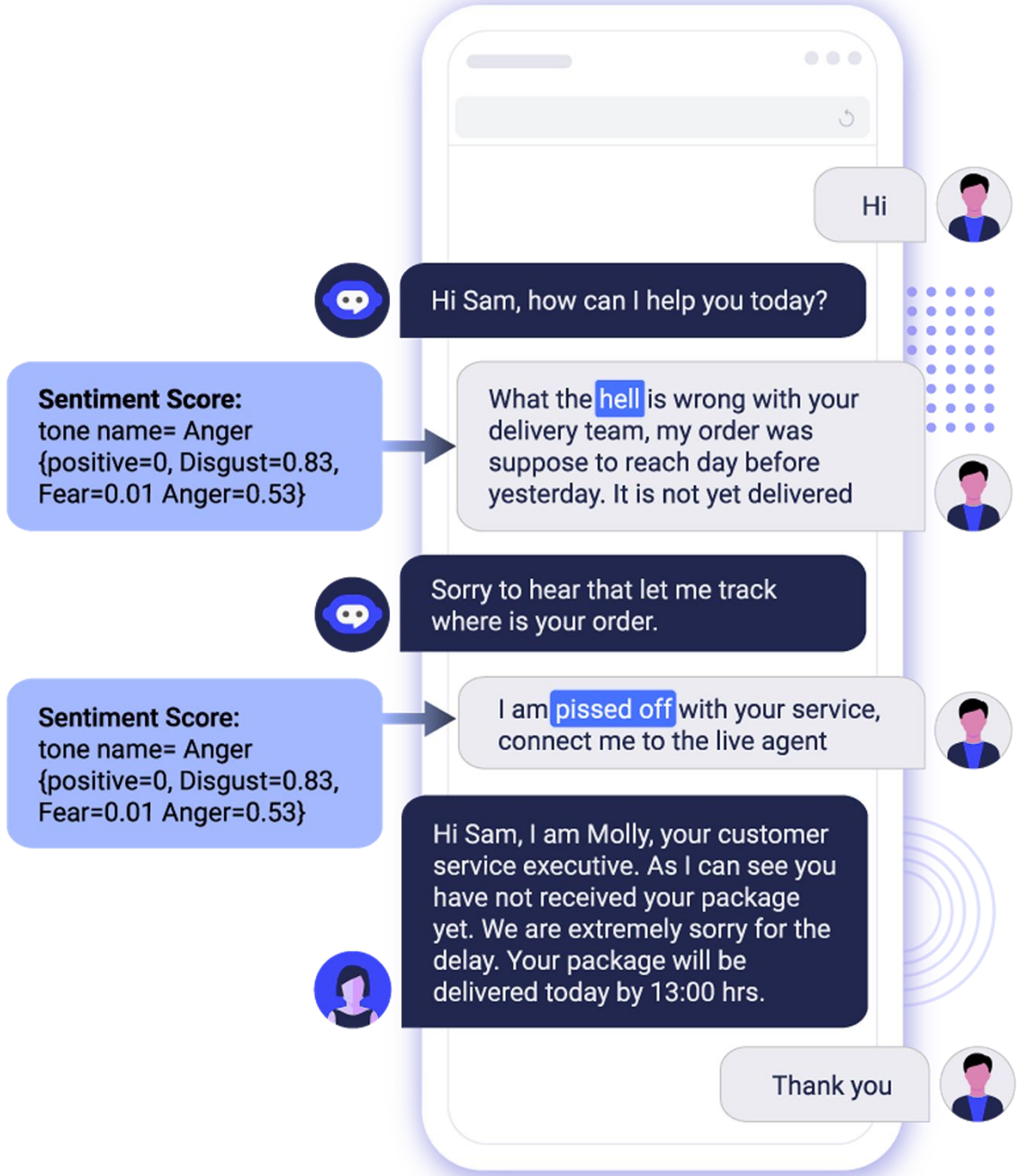


Sentiment Analysis

Platform

- Measures **real-time emotions** based on user utterances
- The tones derived from each statement are **scored, counted, and ranked accordingly**
- Uses the score to **steer the conversation** or **invoke escalation** to a live agent
- In the case of agent transfer – **context** and **sentiment** are passed in a transcript
- Events can be automatically triggered based on user tone for an utterance or on task completion

Emotions: **Disgust** | **Fear** | **Joy** | **Anger** | **Sadness**

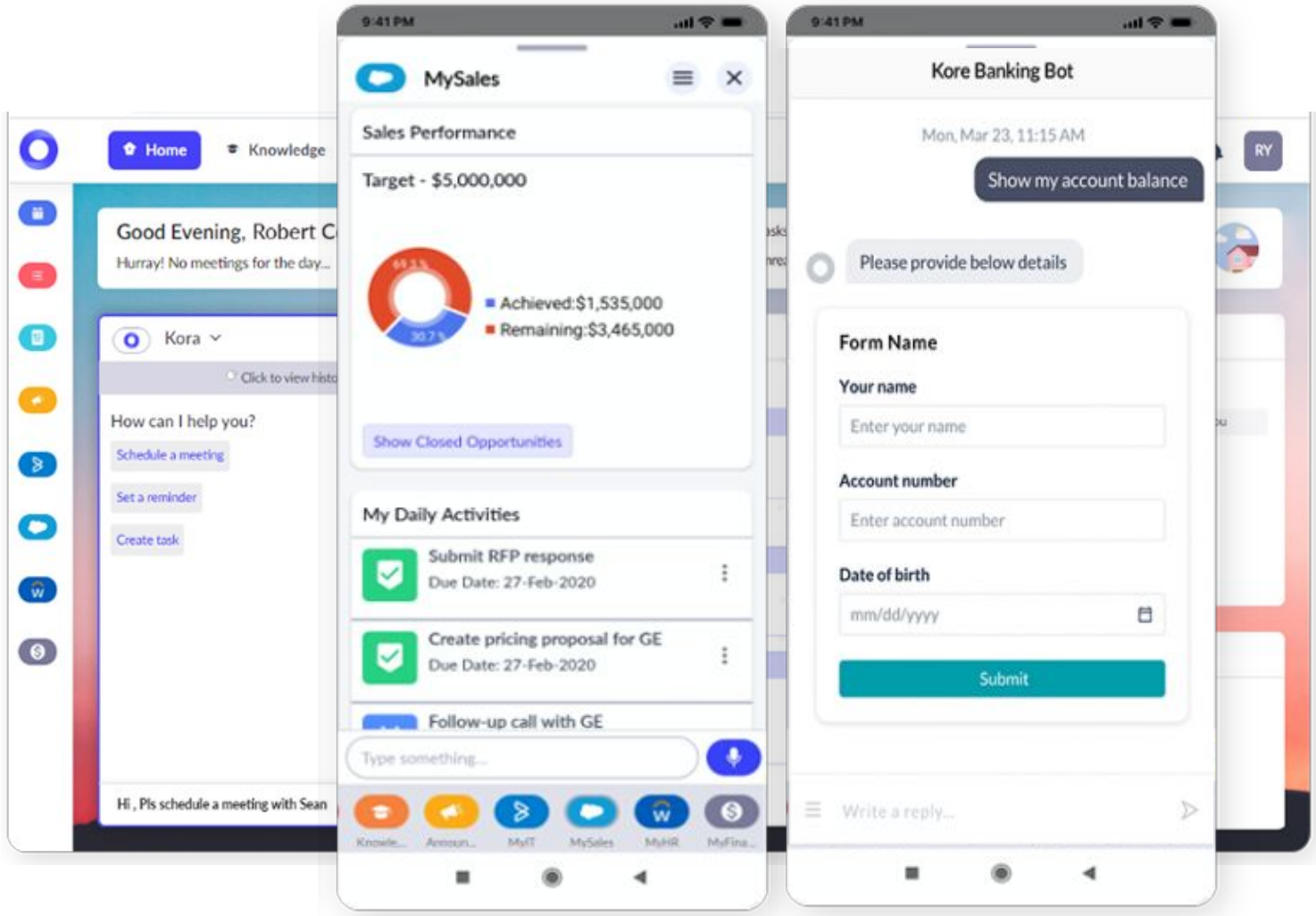


Digital User Experience

Use Conversational Interface and Digital UX to Deliver Modern User Experiences

Platform

- Build a rich blend of **conversational interfaces** and **digital UX**
- Provide **proactive** display of information in visually stunning widgets
- Use embedded forms in conversational interfaces for the **easy information collection**
- Enhance the experience with a seamless **interplay of chat and digital UI**

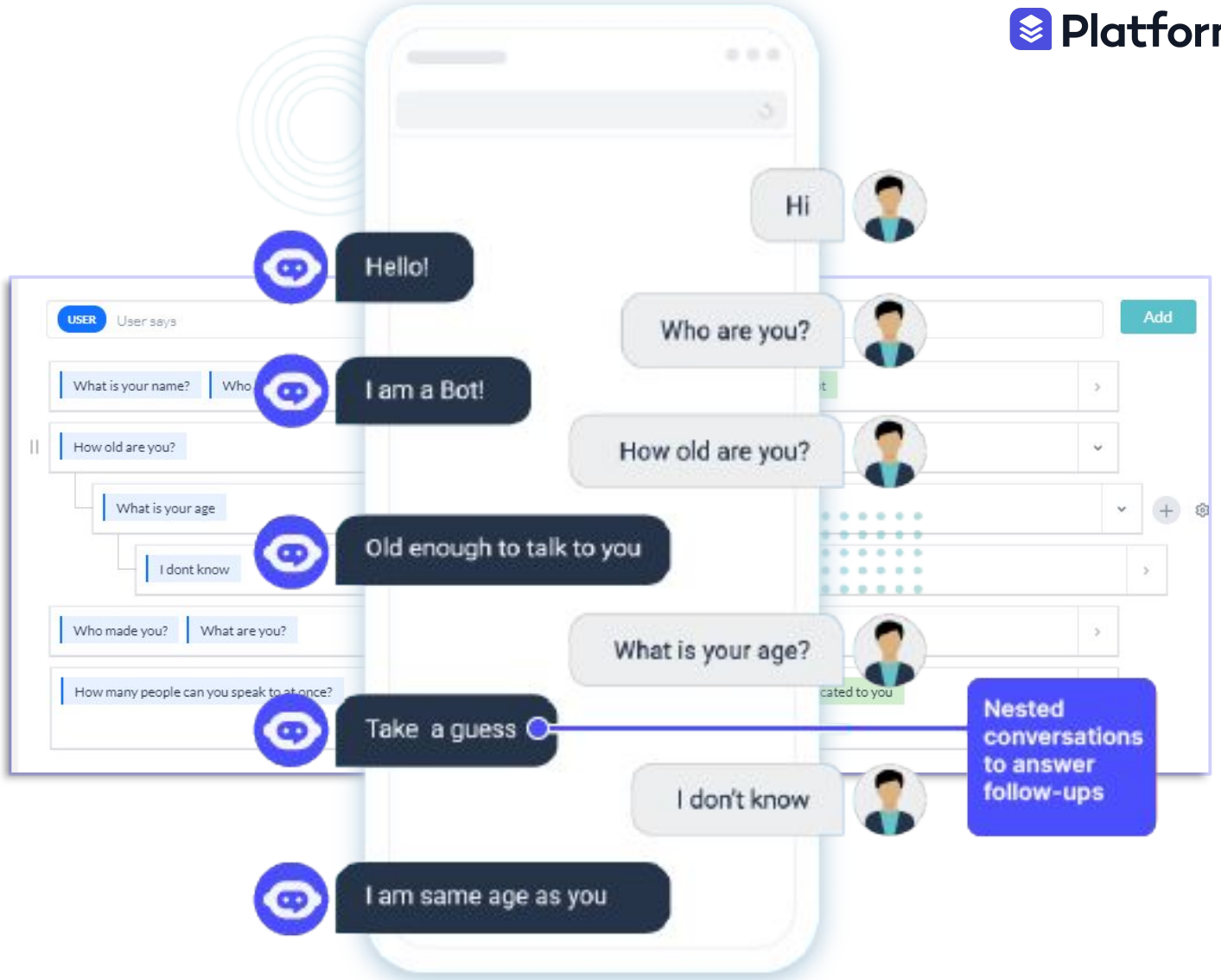


Panels & Widgets **UI Forms**

Small Talk

Platform

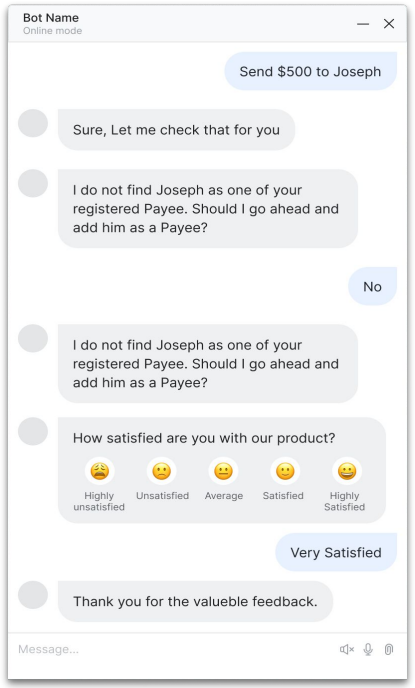
- **Build a personality** and train the assistant to conduct casual conversations
- Quickly **generate multiple scenarios** by simply providing the user and assistant utterances
- Use **Custom Small Talk UI Editor** to build nested conversations to answer follow up questions and context-specific responses

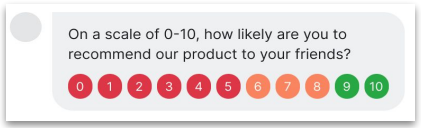


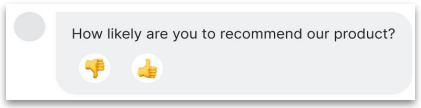
Feedback Surveys

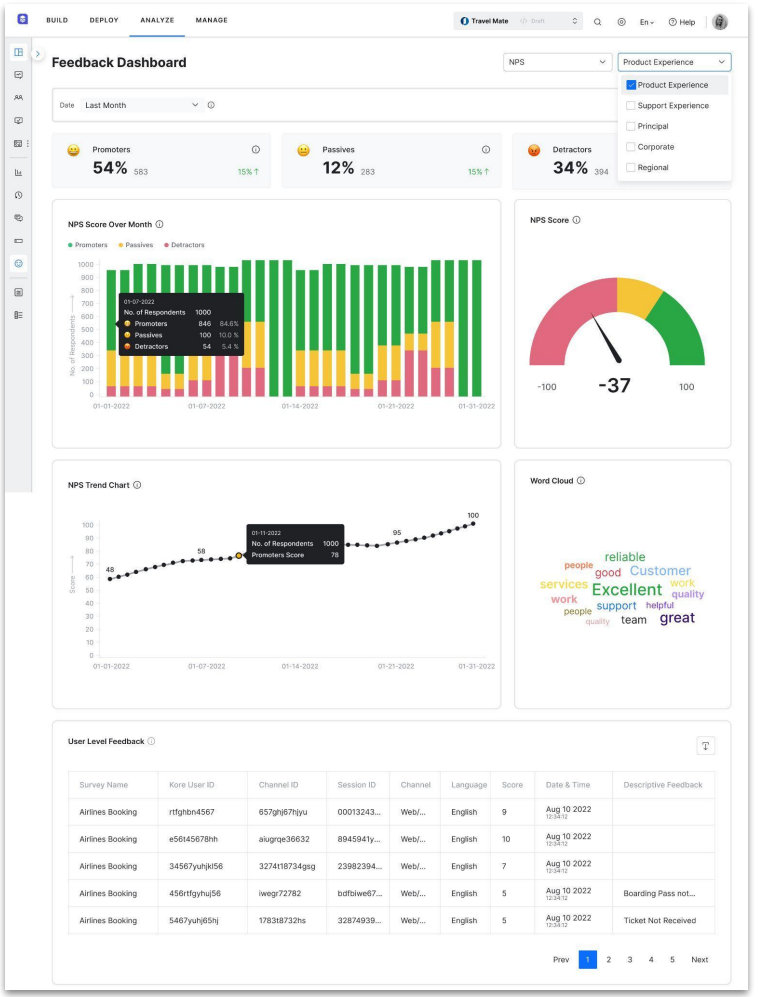
Platform

- Design Feedback Surveys using **CSAT, NPS and Like/Dislike frameworks**
- Trigger the feedback at the end of conversation or where required
- Support for feedback templates on **Web UI channel**
- Submit feedback captured using out-of-the-box flows or custom flows or via API or BotKit
- **Feedback Analytics** module to show the overall score and trend
- Integrated with **Conversations History** module





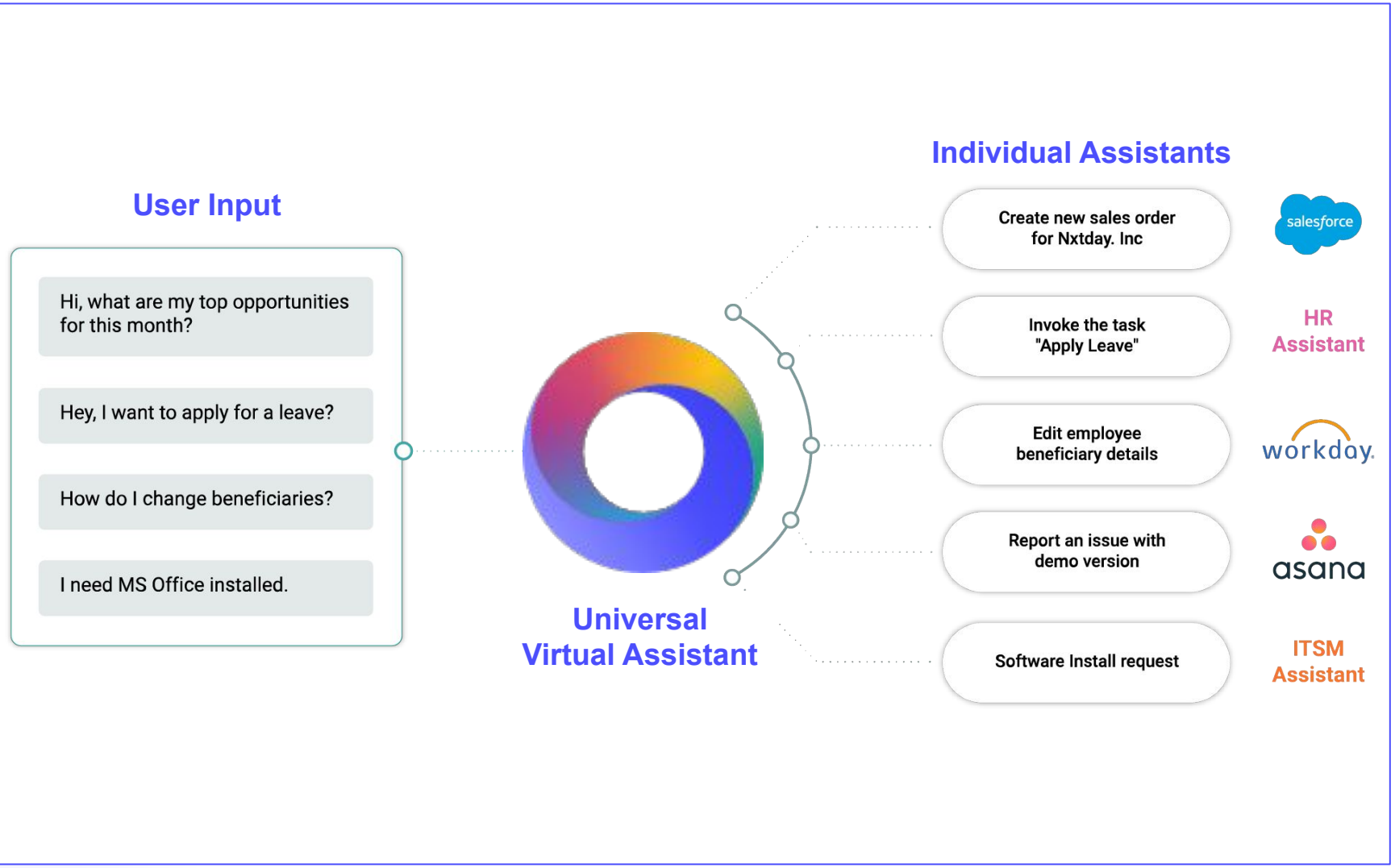




Universal Bots

Platform

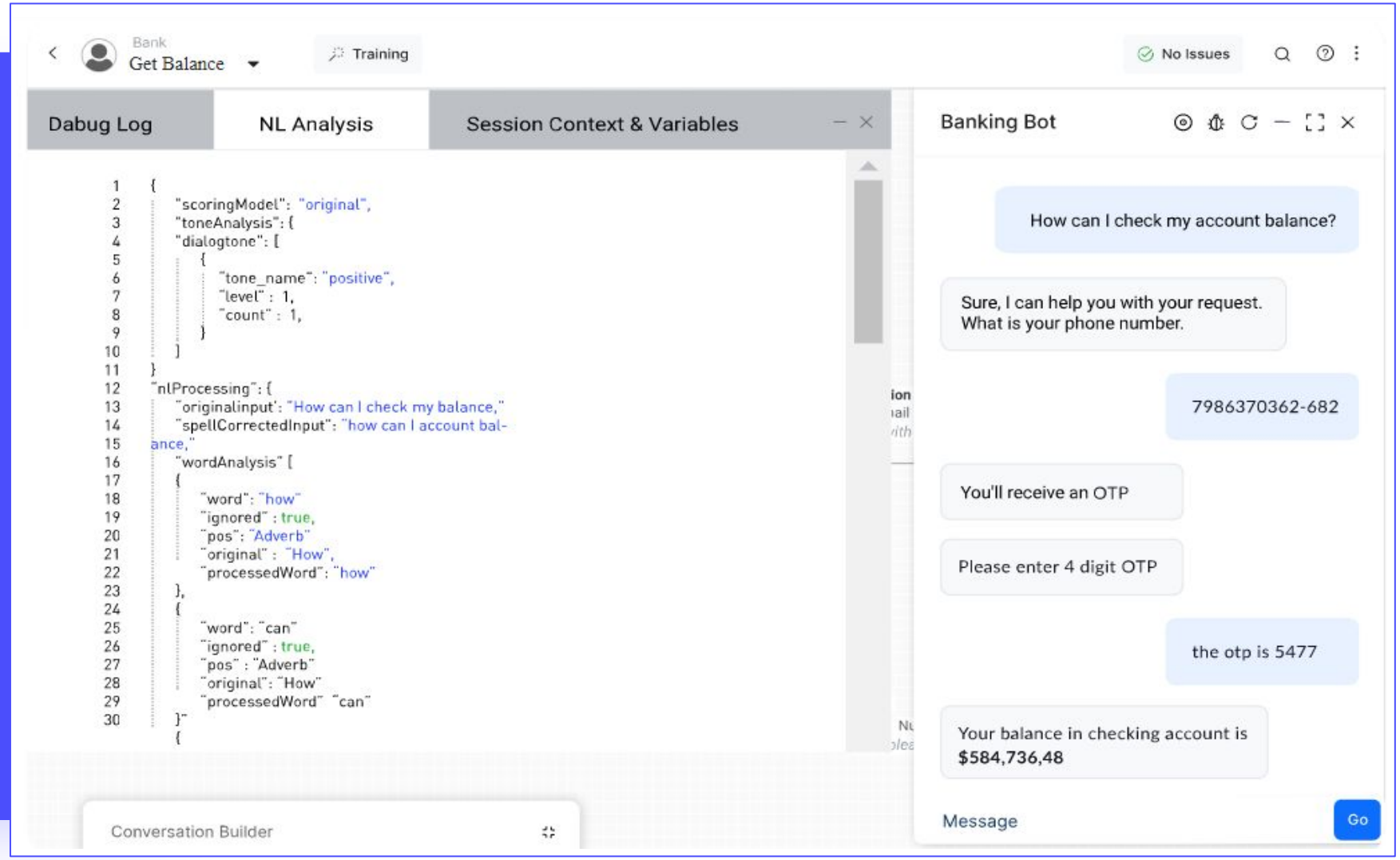
- Connect your individual virtual assistants to simplify the user experience through a unified interface
- Leverage Kore.ai Digital skills, including widgets, panels and forms, provide a digital user experience



Explainable AI: Unlock the ML Blackbox

Platform

- **Real-Time Error Detection:** The Dialog Builder displays any detected errors and warnings in real-time
- **Debug Log:** Provides the sequential progression of a dialog task and context and session variables captured at every node.



Test the Assistant to Ensure Optimal Performance

Platform



Utterance Testing

- Test the virtual assistant's performance for the given utterance.
- The platform uses Hybrid approach to classify user utterances as Definitive Match and Possible Match
- Definitive Matches get high confidence scores and are perfect matches
- Possible Matches are intents that score reasonably well but do not inspire enough confidence



Batch Testing

- Performs a series of tests to performance of your ML model
- Use the Test Suites provided by platform or build your own in CSV or JSON format
- The platform also provides a few out-of-the box Test Suites:
  - Developer defined utterances
  - Successful user utterances

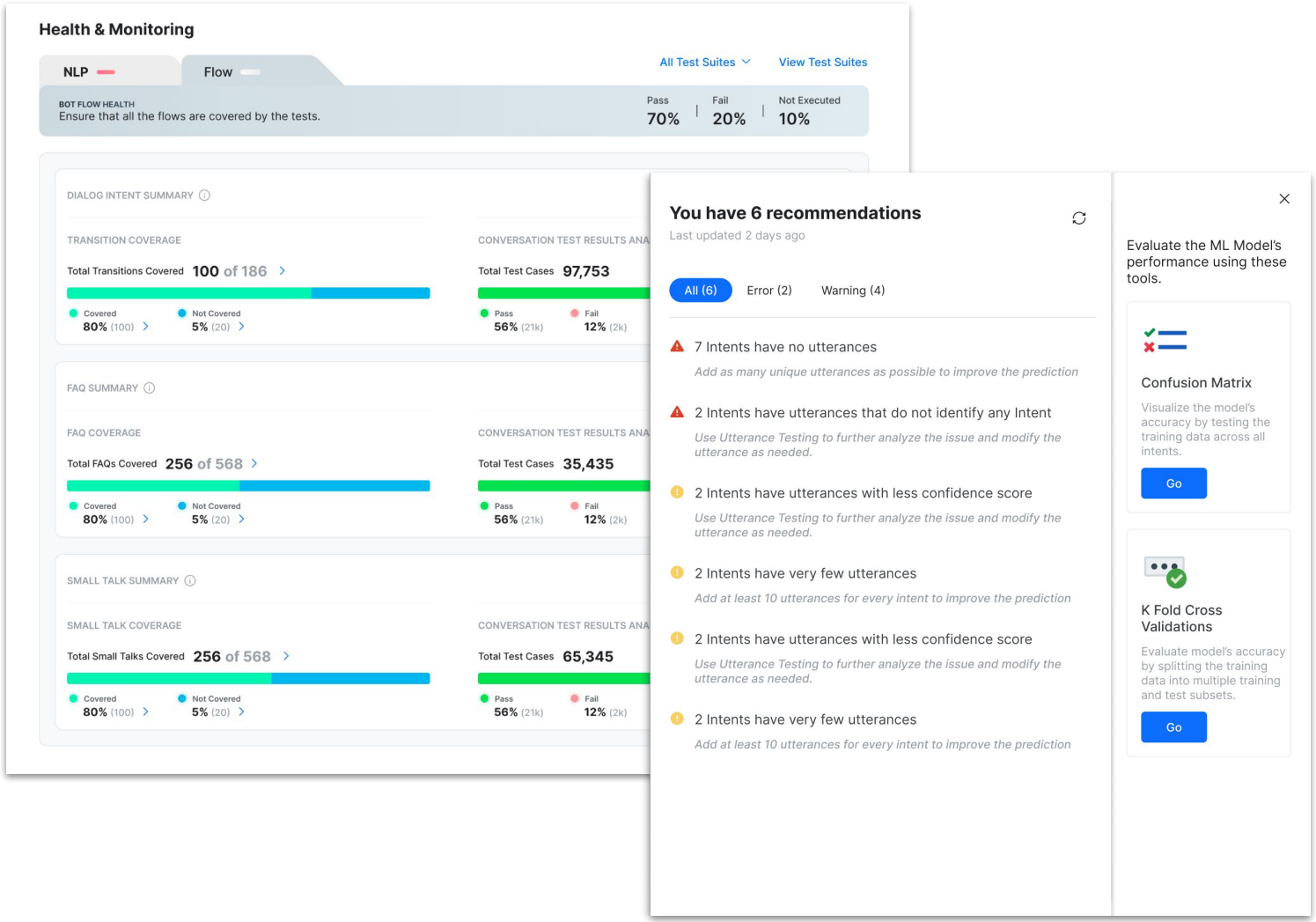


Conversation Testing

- Simulate end-to-end conversational flows to perform regression
- Create Test Cases to capture various business and validate the virtual assistant performance

Health & Monitoring [NLP & FLOW]

Platform



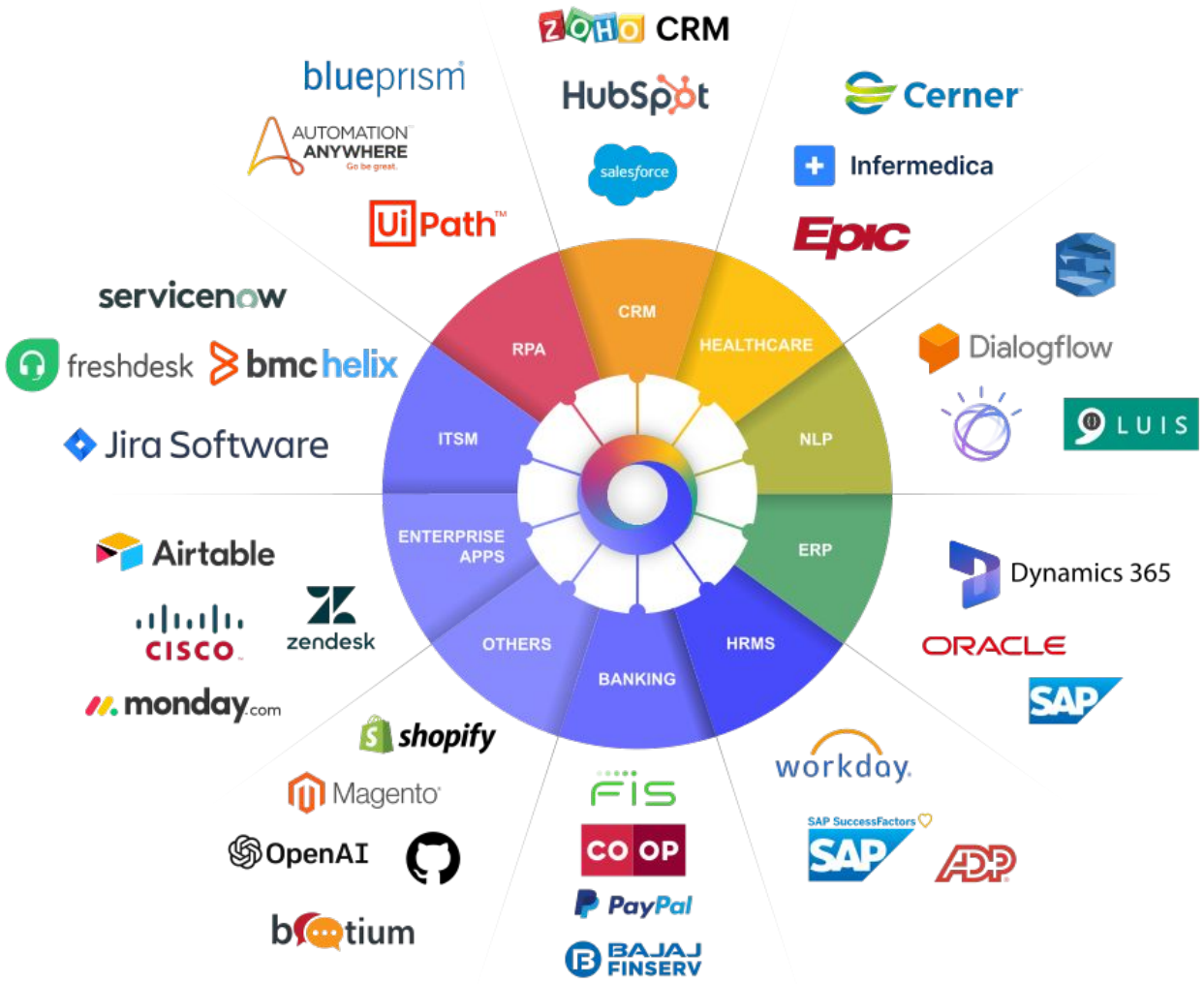
- Framework to enhance the NLU and Flow using in-depth analysis of training health, test coverage accuracy and test data results
- Provides actionable insights and recommendations to improve the NLP and Flows.
- Includes new recommendations for identifying incorrect patterns, short utterances and incorrect entity annotations.
- Flow Health presents insights into coverage and flow health of the intelligent virtual assistants

Integrations

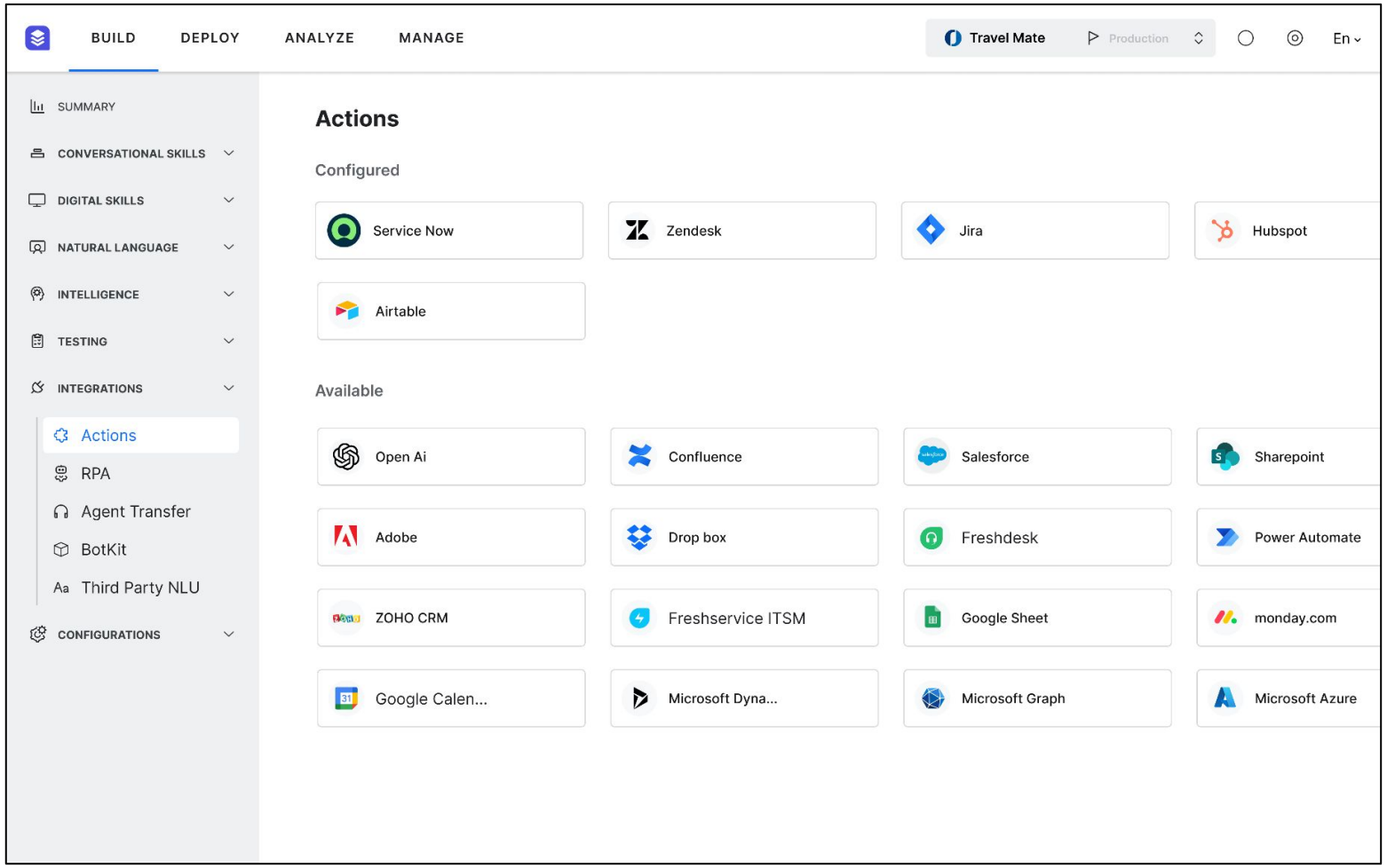


Integrations

- Boost productivity and foster teamwork by integrating and smoothly transferring information between applications and systems
- Manipulate data collected in a user session before, during, and after an API request is made to a web service
- Enable one authentication profile across all assistants and tasks for rapid deployment



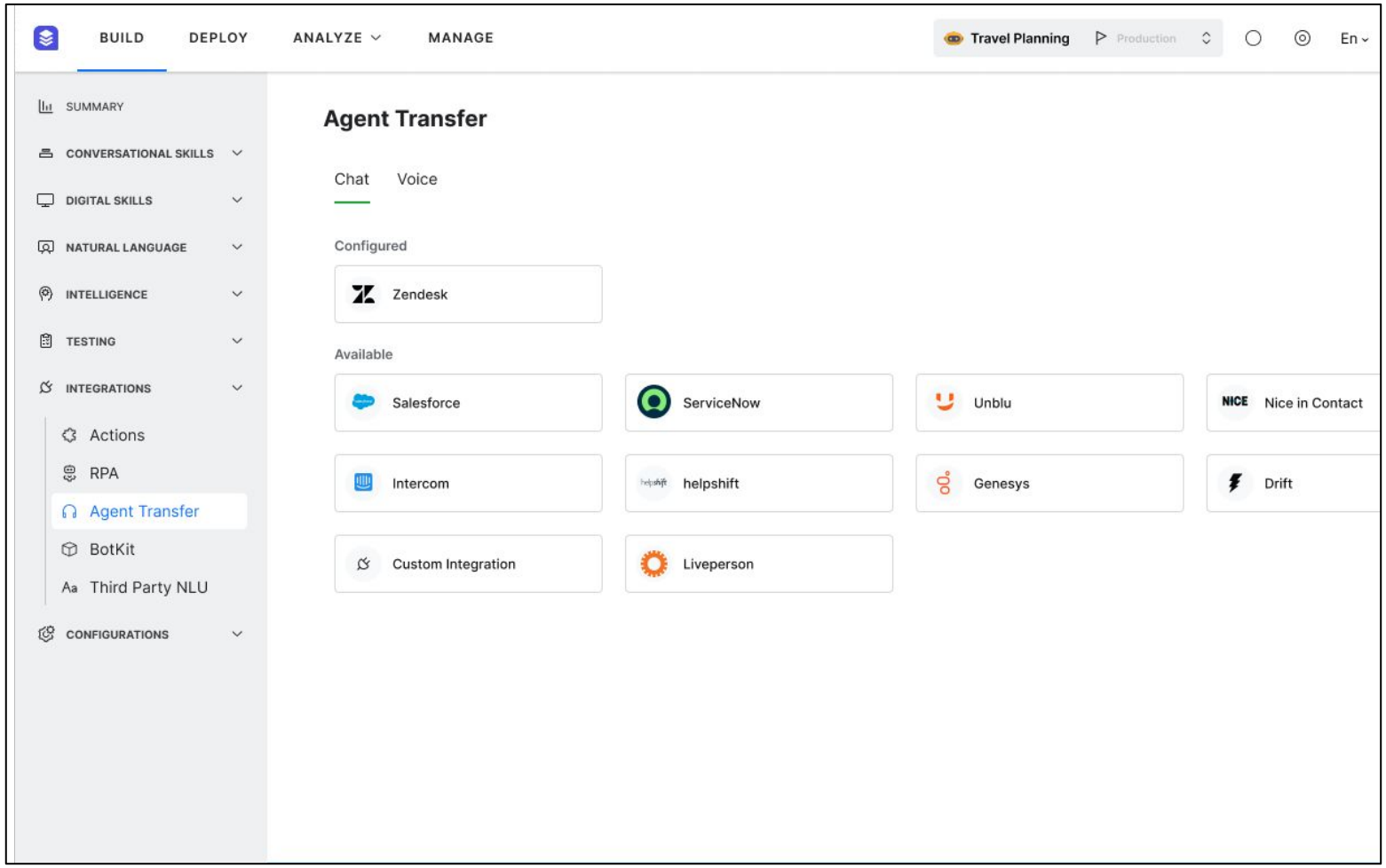
Pre-built Integrations - Actions



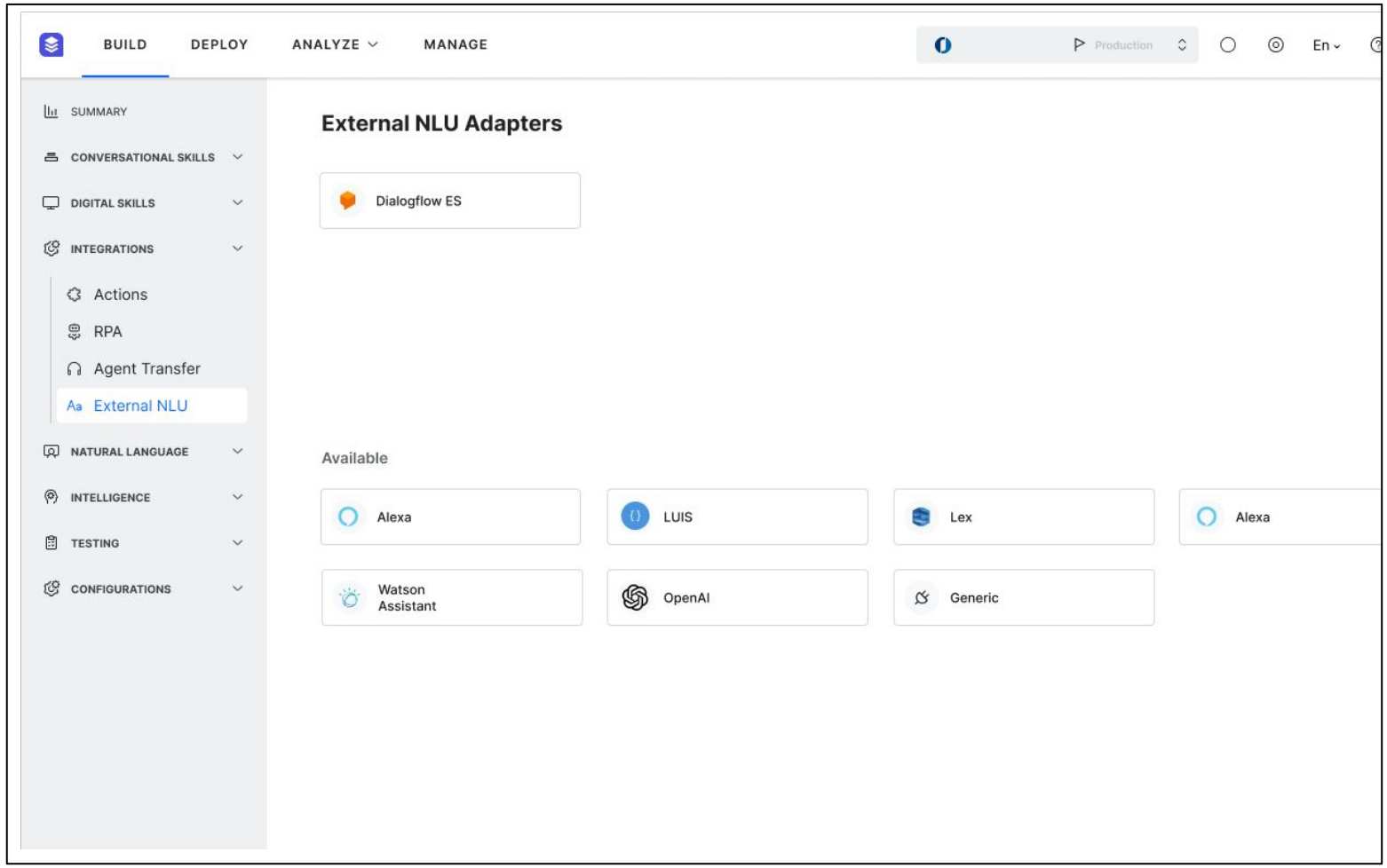
- Easy and no-code interface to integrate with popular applications for CRM, support, ticketing and others
- 70+ integrations with continuous updates
- Every integration comes with prebuilt flows, service calls and response mapping
- Install flows or use the service call mapping or both
- Map specific parts of the response into the context

Pre-built Integrations - Agent Handoff

- Pre-built integrations with popular live/human agent systems to hand-off the conversation
- Support for Salesforce, ServiceNow, Unblu, Nice In Contact, Zendesk etc.,
- Support for IVR Properties as part of the Agent Transfer node to support live agent hand-off for voice conversations (IVR channel)
- Avoids the need for hosting BotKit SDK services



Pre-built Integrations - External NLU



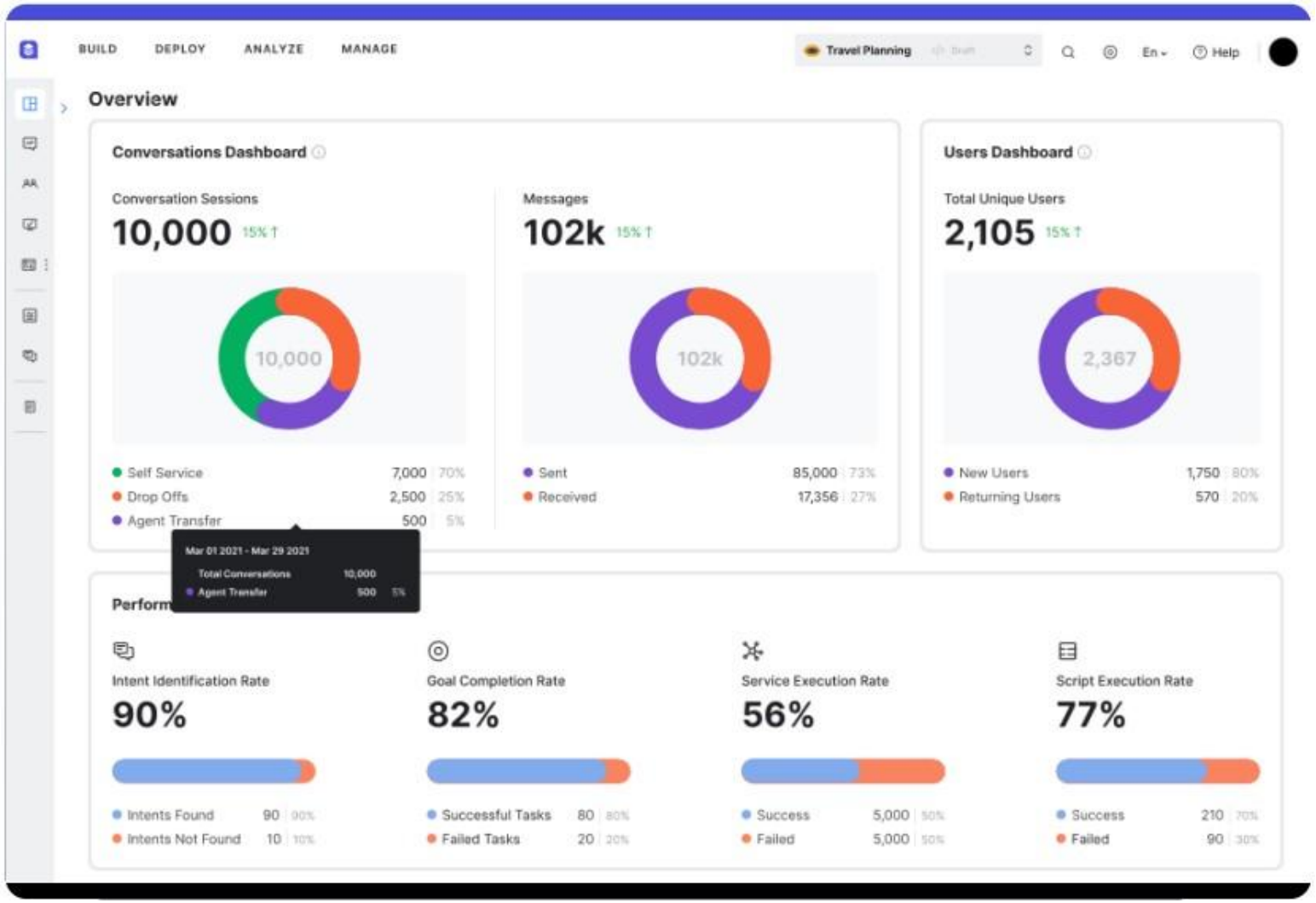
- Pre-built integrations with external NLU engines to complement intent and entity detection
- Seamless experience with Kore.ai NLU model as a fallback option
- Intents or entities identified by external NLU engines are accepted as definitives and take precedence
- The approach matches ‘Intent Names’ and ‘Entity Names’ between the Kore.ai definition and definition from external NLU engines. It is essential to have the same names for the integration to work.

Conversational Analytics

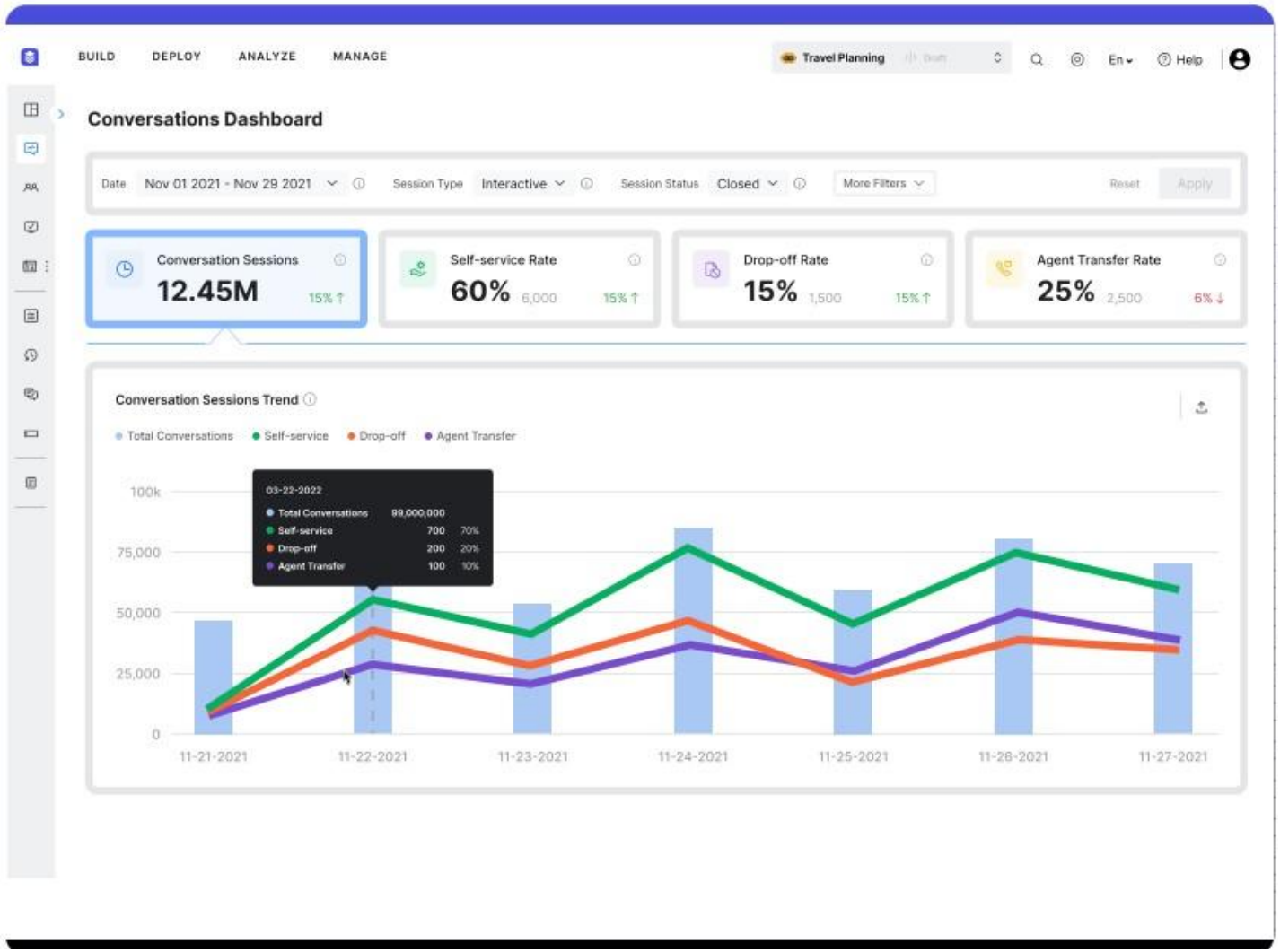


Overview Dashboard

- Hawk-Eye View of Critical Metrics to understand the user behavior and IVA performance
- Conversations Dashboard
- Users Dashboard
- Performance Dashboard



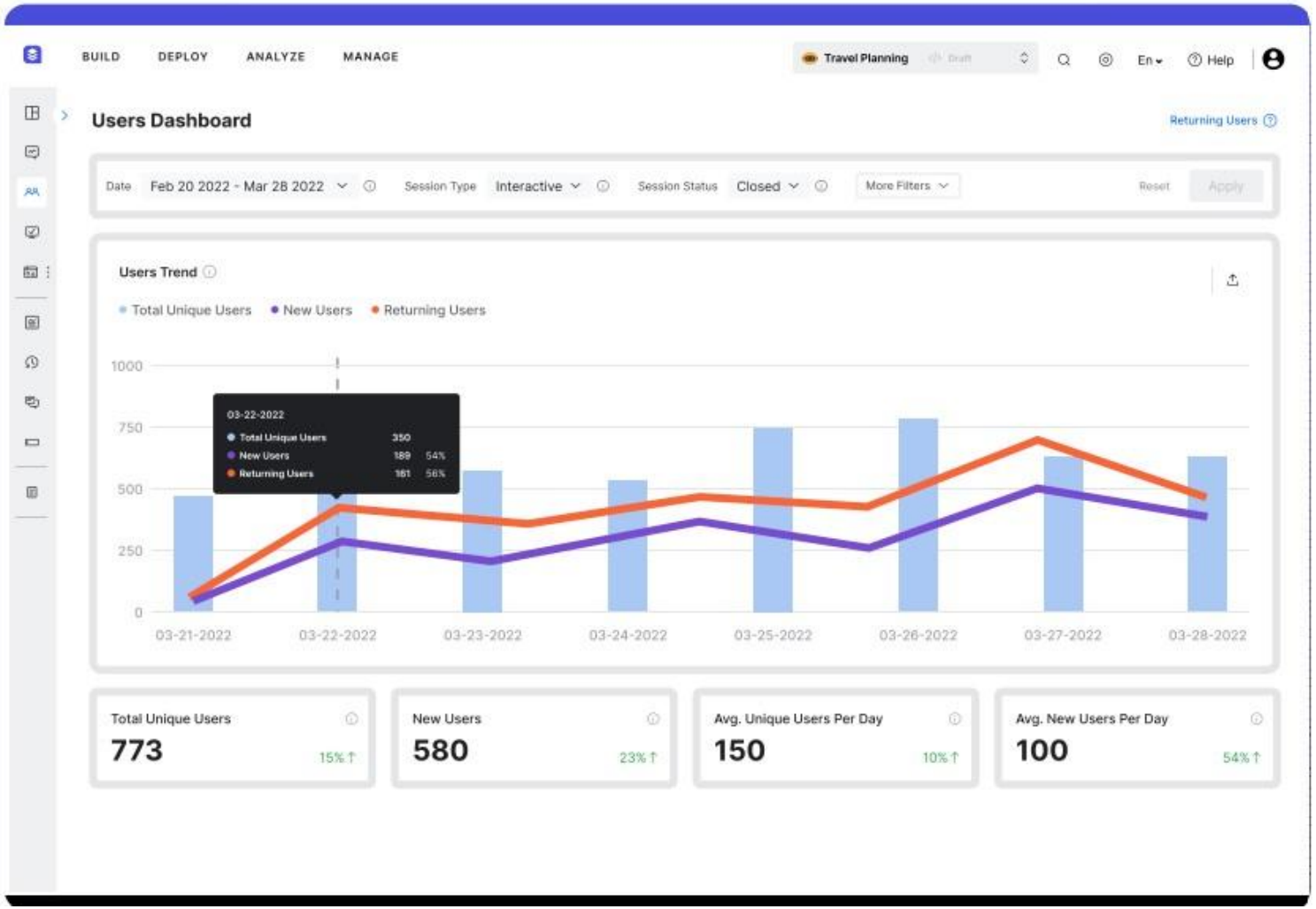
Conversations Dashboard



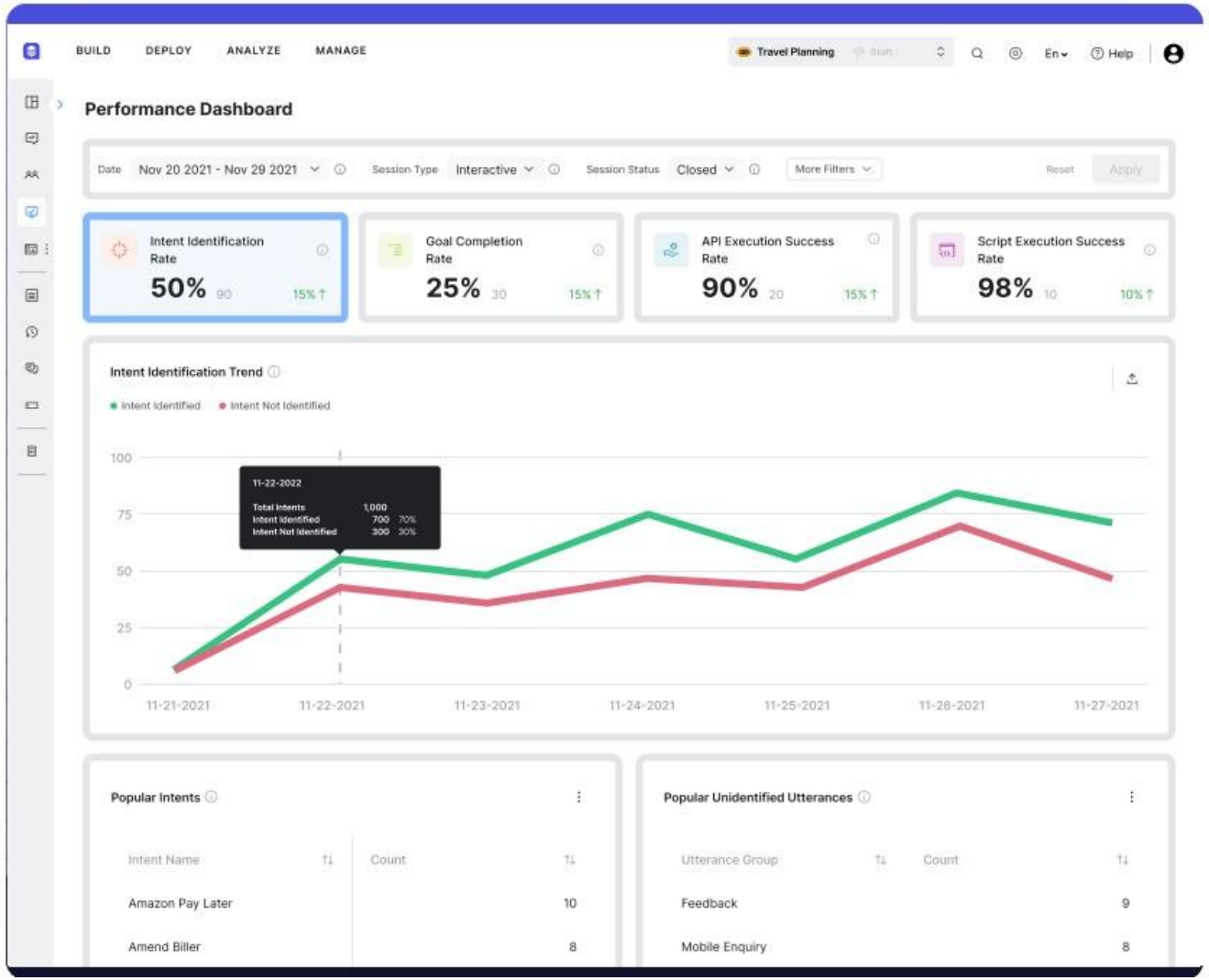
- Make Data-Driven Decisions by analyzing usage and containment metrics
- Track complete conversation sessions and the breakup of self-service, drop-off, and agent sessions
- Key metrics -
  - Conversation Session Trends
  - Message Trends
  - Channel Distribution
  - Most Active Hours
  - Engagement Analysis

Users Dashboard

- Assess User Behavior by tracking the user interaction data
- Evaluate metrics like user trends and retention status (active and inactive)
- Cohort analysis plots the weekly new users and the percentage of returning users
- Key metrics –
  - User Trends
  - Returning Users
  - Cohort Analysis



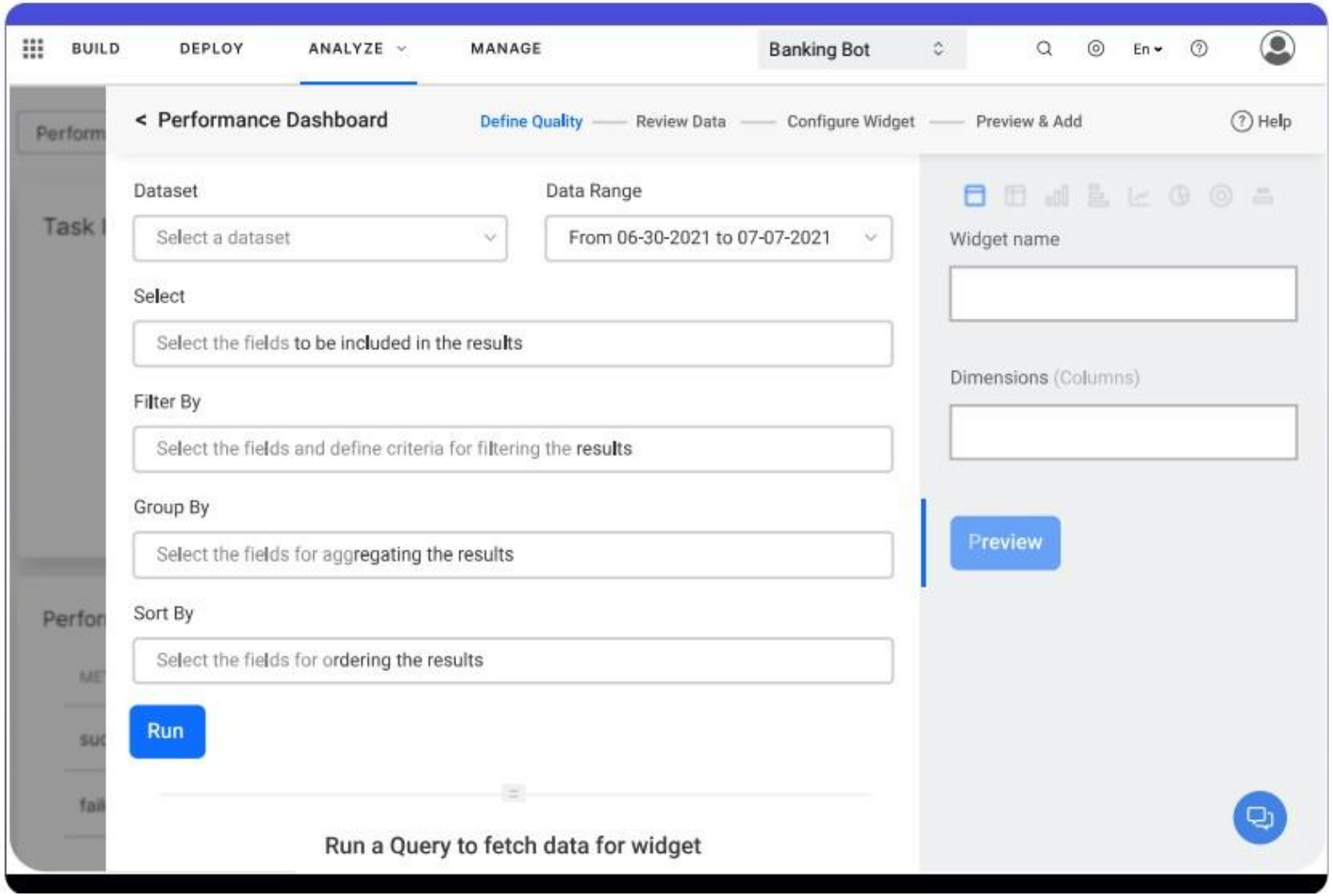
Performance Dashboard



- Deliver Extraordinary Experiences by monitoring the IVA performance and executing changes
- Get insights on intent identification rate, goal completion rate, API, and script execution rate
- Key metrics –
  - Popular Intents
  - Unidentified Intents
  - Trends
  - Performance

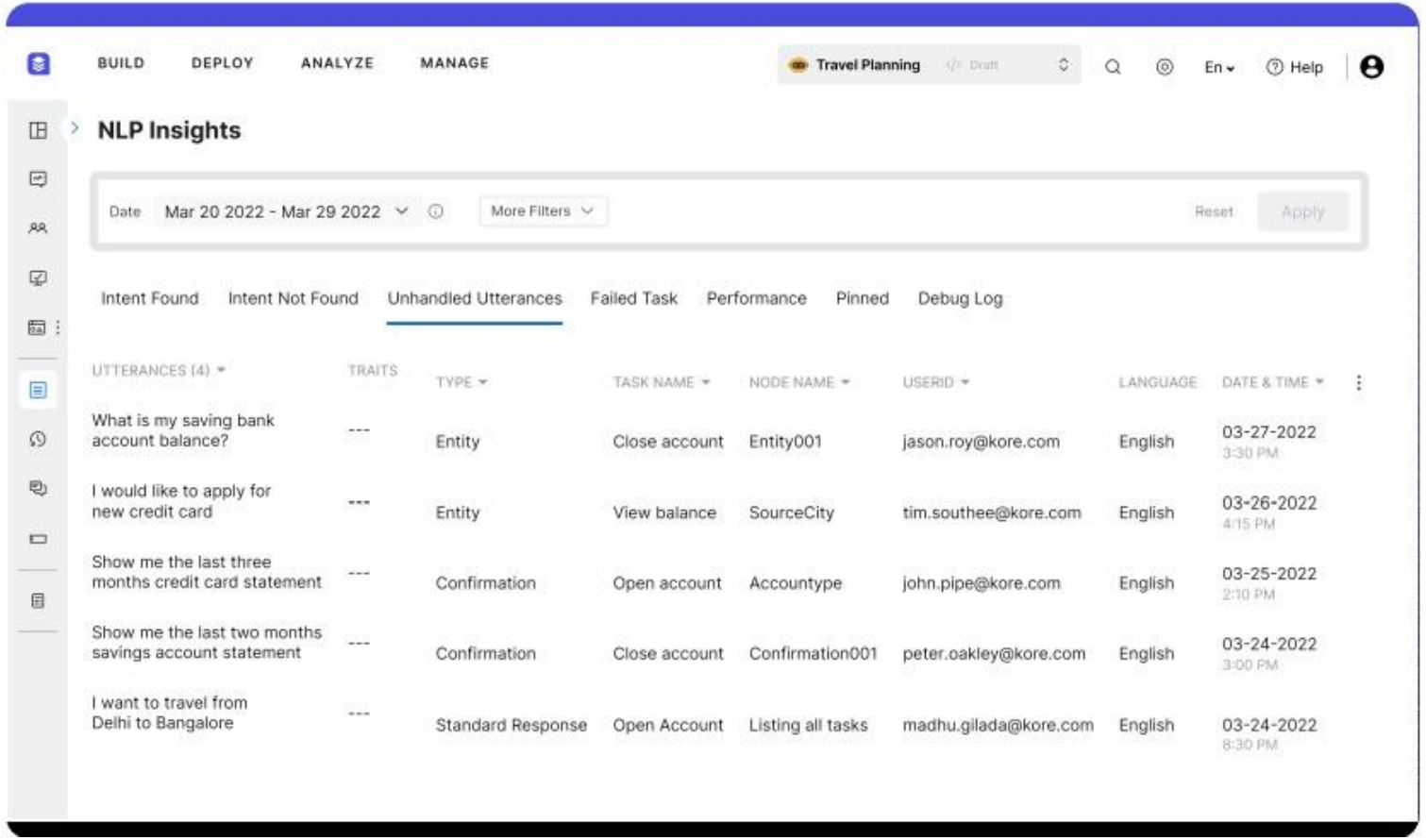
Custom Dashboard

- Track Business-Specific Metrics by building custom dashboards
- No-code interface to configure widgets to track messages, analytics or session datasets and add them to the dashboard
- Ability to add additional Dashboard level filters for custom dashboards
- Containment Type is available a field in Sessions Dataset



NLP Insights

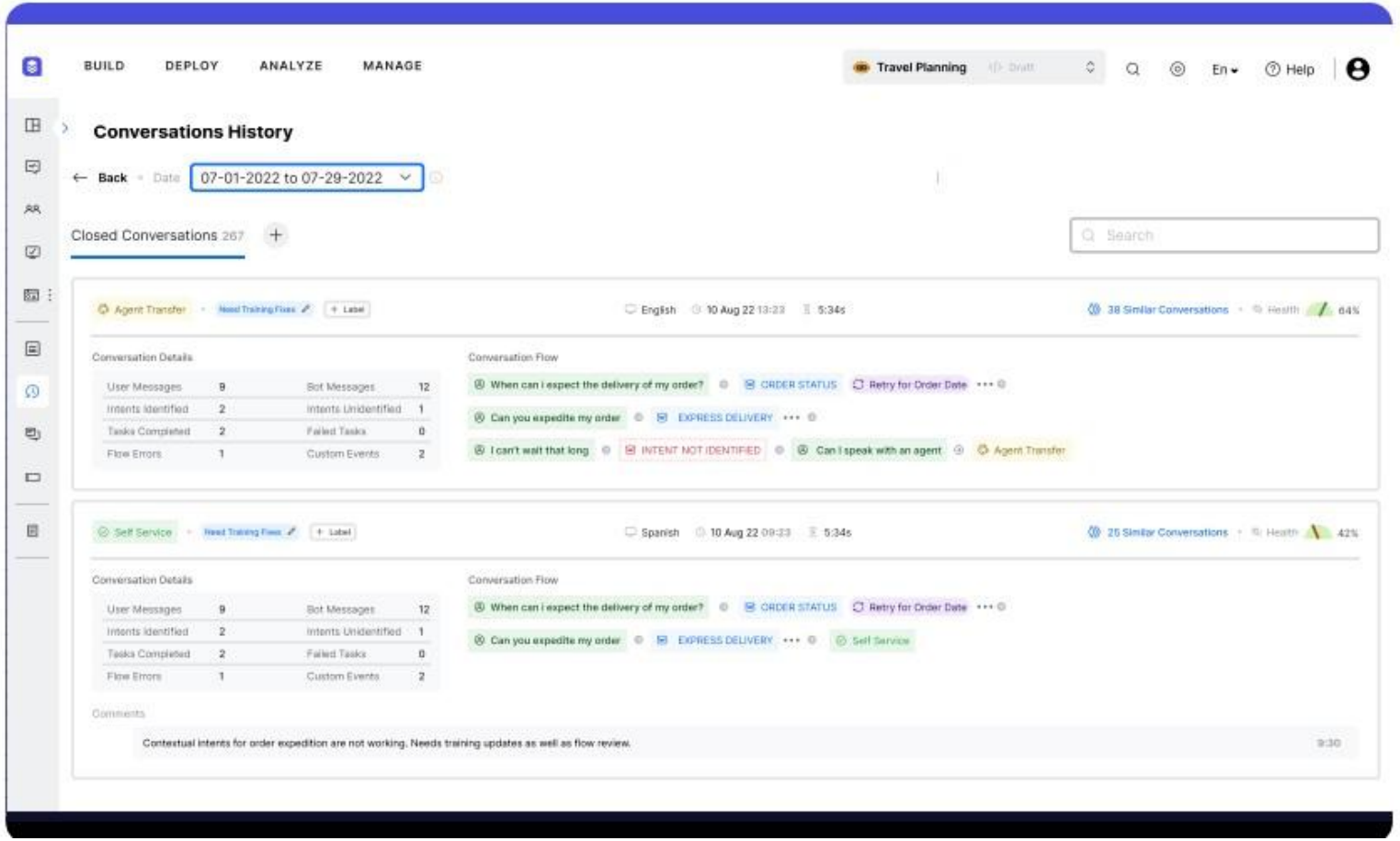
Platform



- Gain in-depth insights into the NLP and optimize the training
- Track IVA performance – identified and not unidentified intents, unhandled utterances, and failed tasks
- Review the chat transcripts, and view all the scripts and API services across the VA tasks from a single window

Conversations History

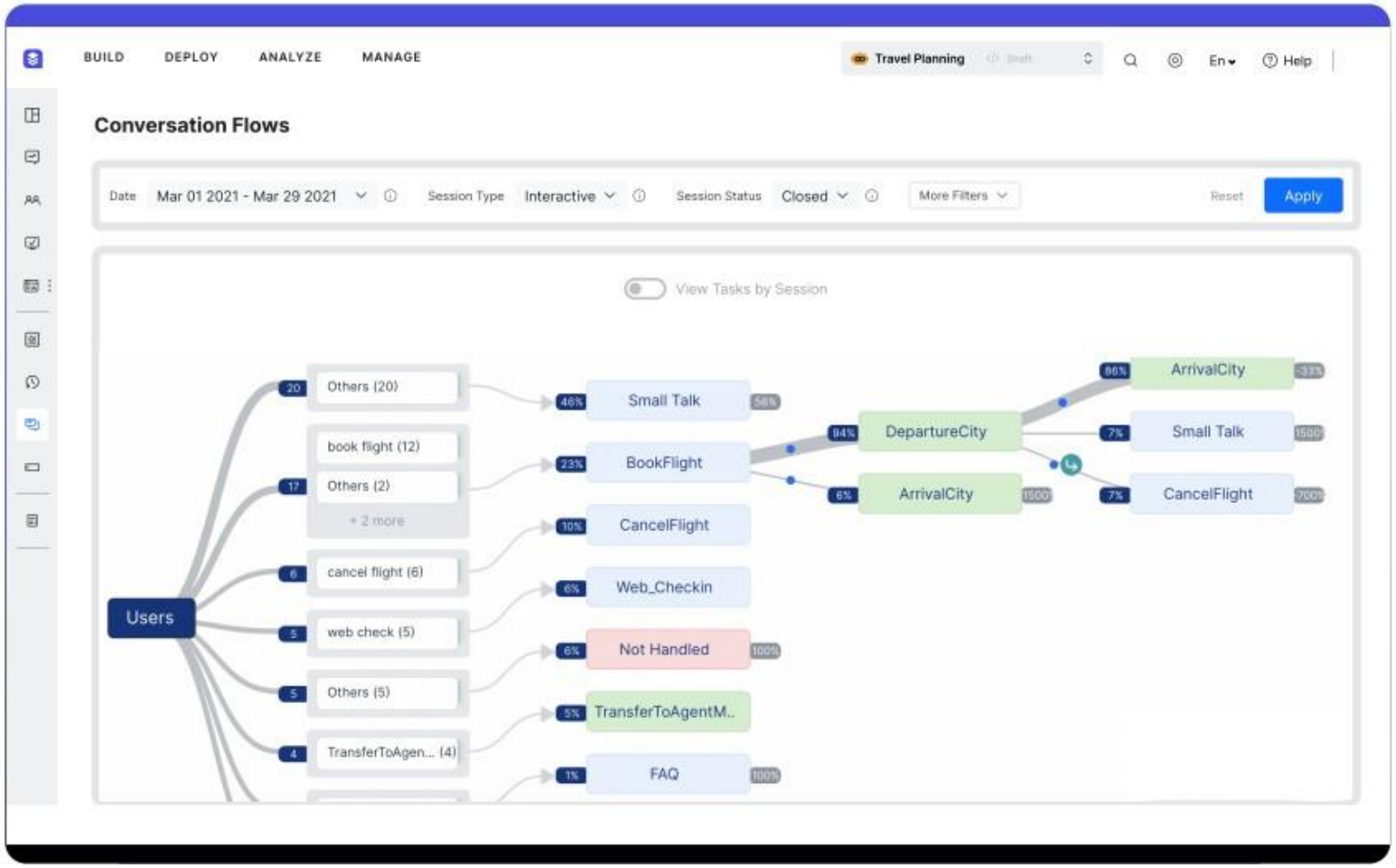
- Analyze Every Interaction by tracking the summary and chat history
- Detailed summary of conversations flow (including the transcripts) and critical events
- Conversation-specific metrics like:
  - Intent identification
  - Completed and failed tasks,
  - Flow errors
  - Duration of the conversation, time, health, and more
- Add custom labels for review and collaboration
- View feedback received from the customer



Conversation Flows

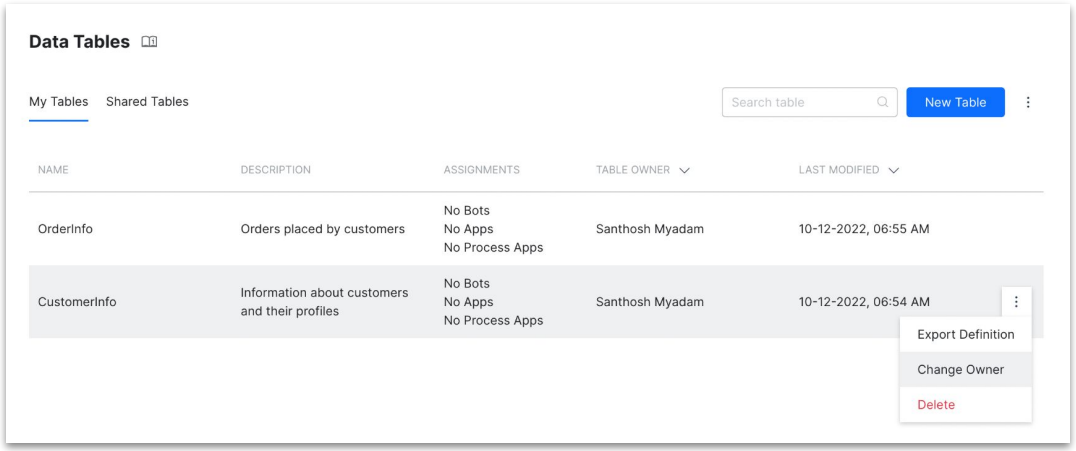
Platform

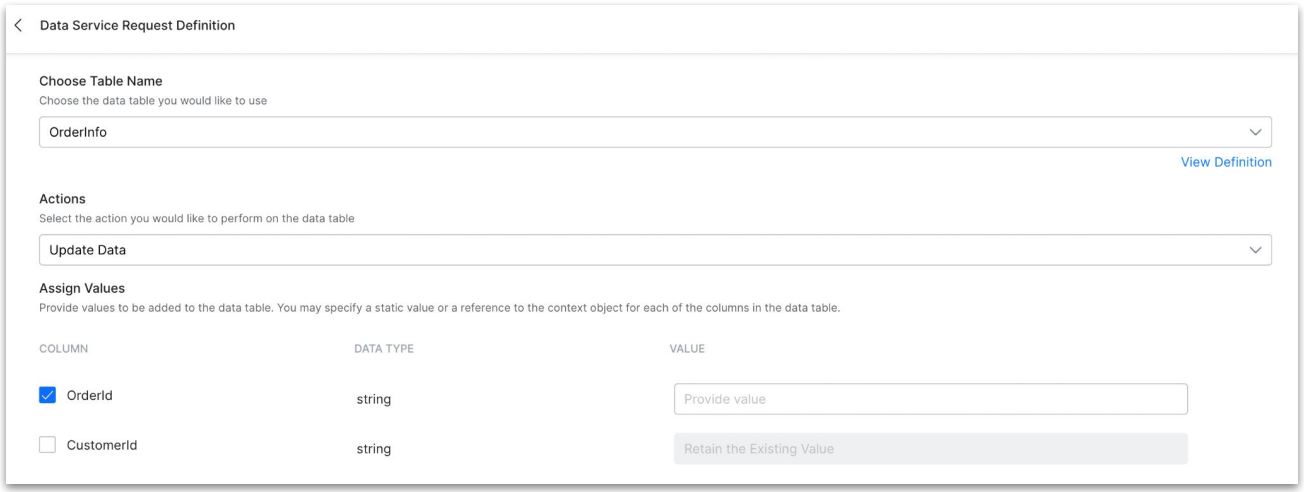
- Trace User Journey with an interactive visual representation
- Intent flow - Understand how virtual assistant's intents are identified and executed
- Session flow - View user journeys across the different intents during execution



Data Tables

Platform





- Data tables allows you to capture and retrieve customer data within the platform
- Offers APIs to read, write, update, and delete data.
- Transfer data table ownership to other users
- View and manage all Data Tables and Views in the account/workspace from Admin Console
- View and update full definition from Service Nodes (Data Service)

Process Assistants

Empower employees with the next-generation process automation



Automate Business Processes that Across Multiple Tasks and Users

Platform



Process Assistants automate and optimize critical business processes conversationally.

- **Higher Productivity** - Automate business processes
- **Easy Setup** - Quickly make changes to the assistant
- **Multi-Step** - Define conditional logics and flows
- **Multi-user** - Configure multi-level approvals
- **Proactive** - Send timely notifications and alerts
- **Operational Efficiency** - OOTB integrations with enterprise systems

Trigger Process with Simple Natural Commands

Platform

Conversational AI First

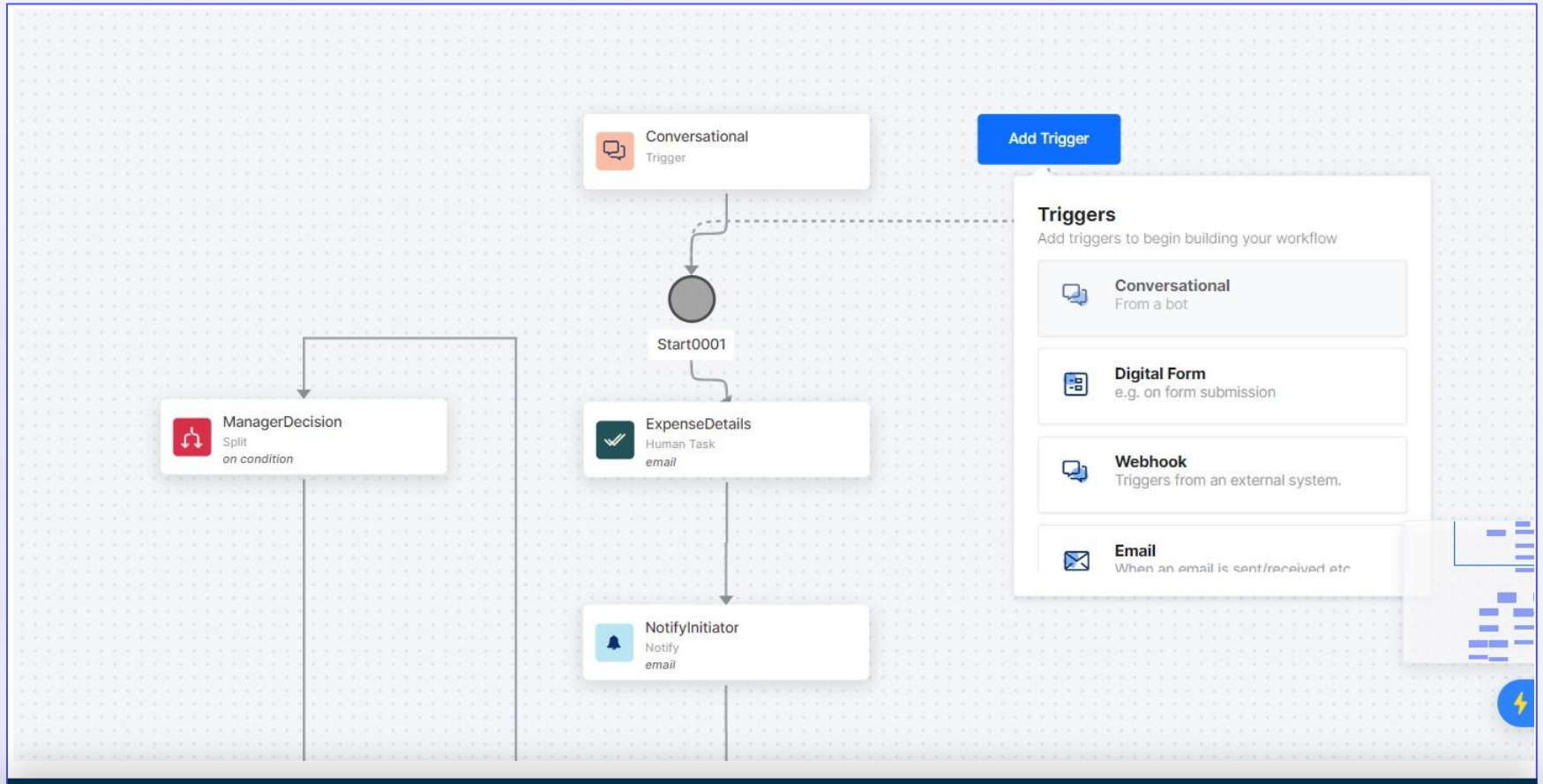
Form Builder

Multi-step, Multi-user

Process Simulator

Experience Portal

Dashboards

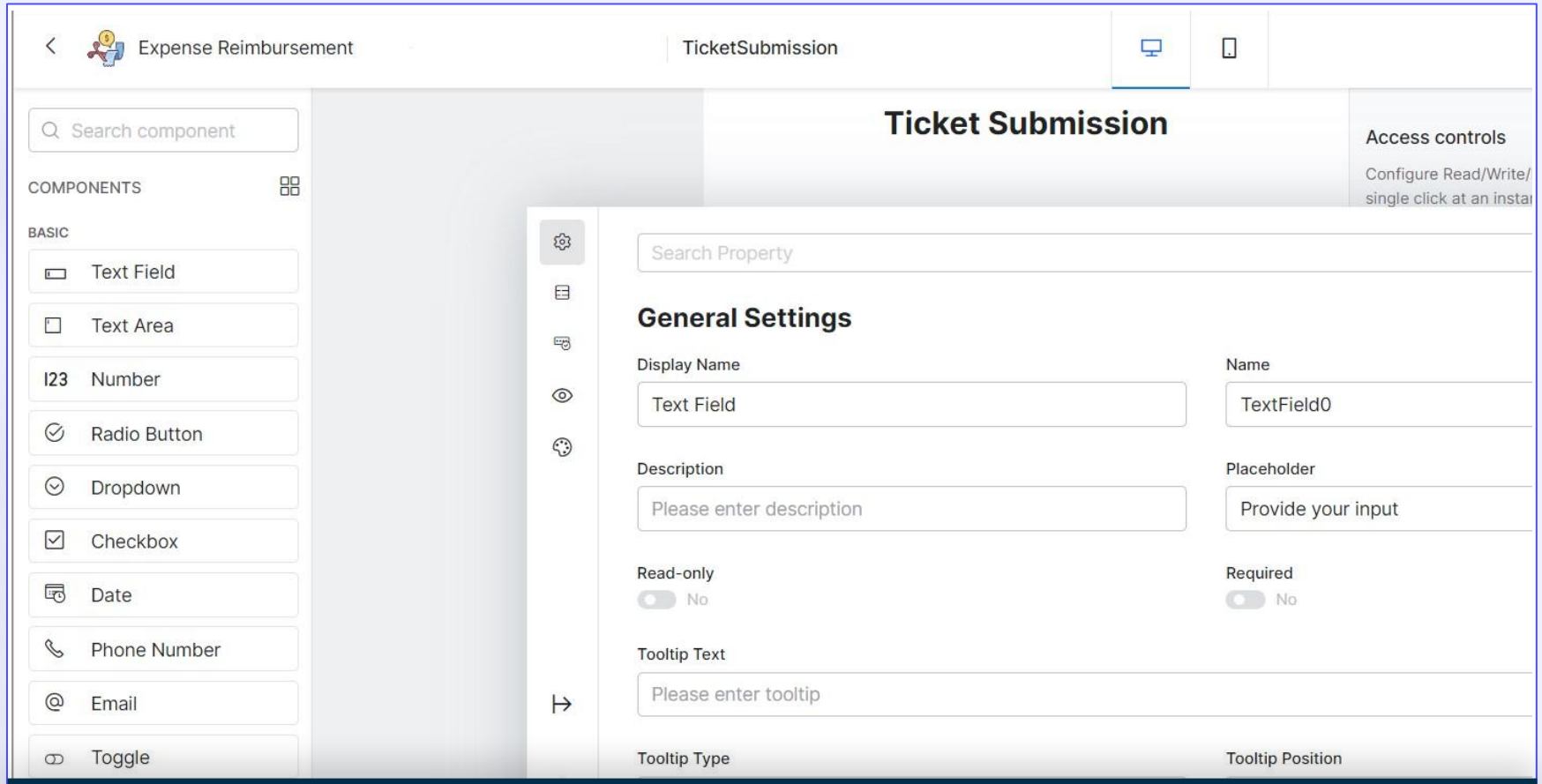


- Invoke a process through natural human commands
- Integrate the process assistants with virtual assistants to conversationally trigger a process

Capture Input Through UI-rich Forms, Built in Minutes

Platform

- Conversational AI First
- **Form Builder**
- Multi-step, Multi-user
- Process Simulator
- Experience Portal
- Dashboards

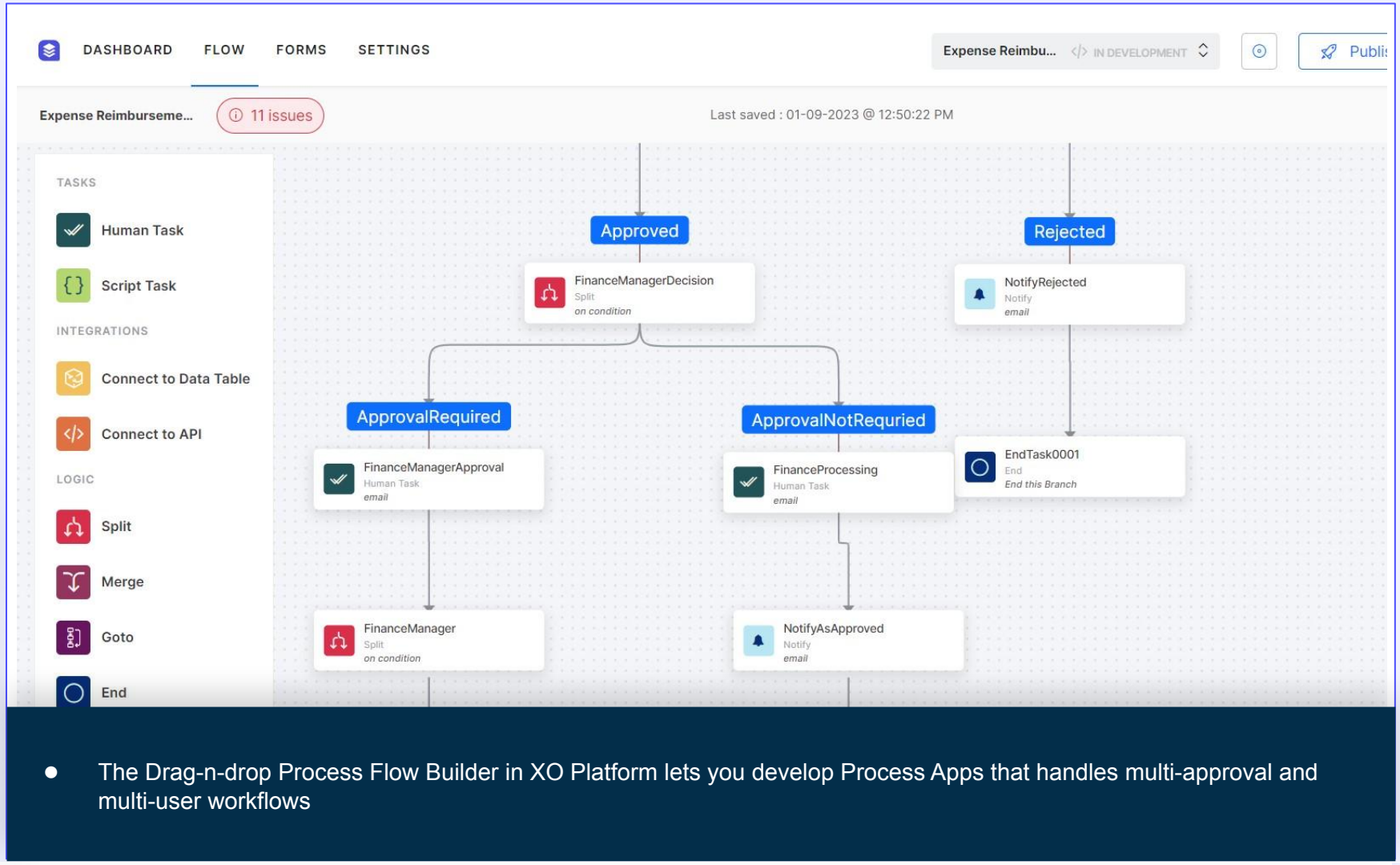


- Drag-n--drop Form builder provides numerous tools to develop user friendly interactive forms
- Accommodate buttons, dropdowns, rules, definitions, validations and more

Automate Workflows Across Functions, and Users

Platform

- Conversational AI First
- Form Builder
- **Multi-step, Multi-user**
- Process Simulator
- Experience Portal
- Dashboards

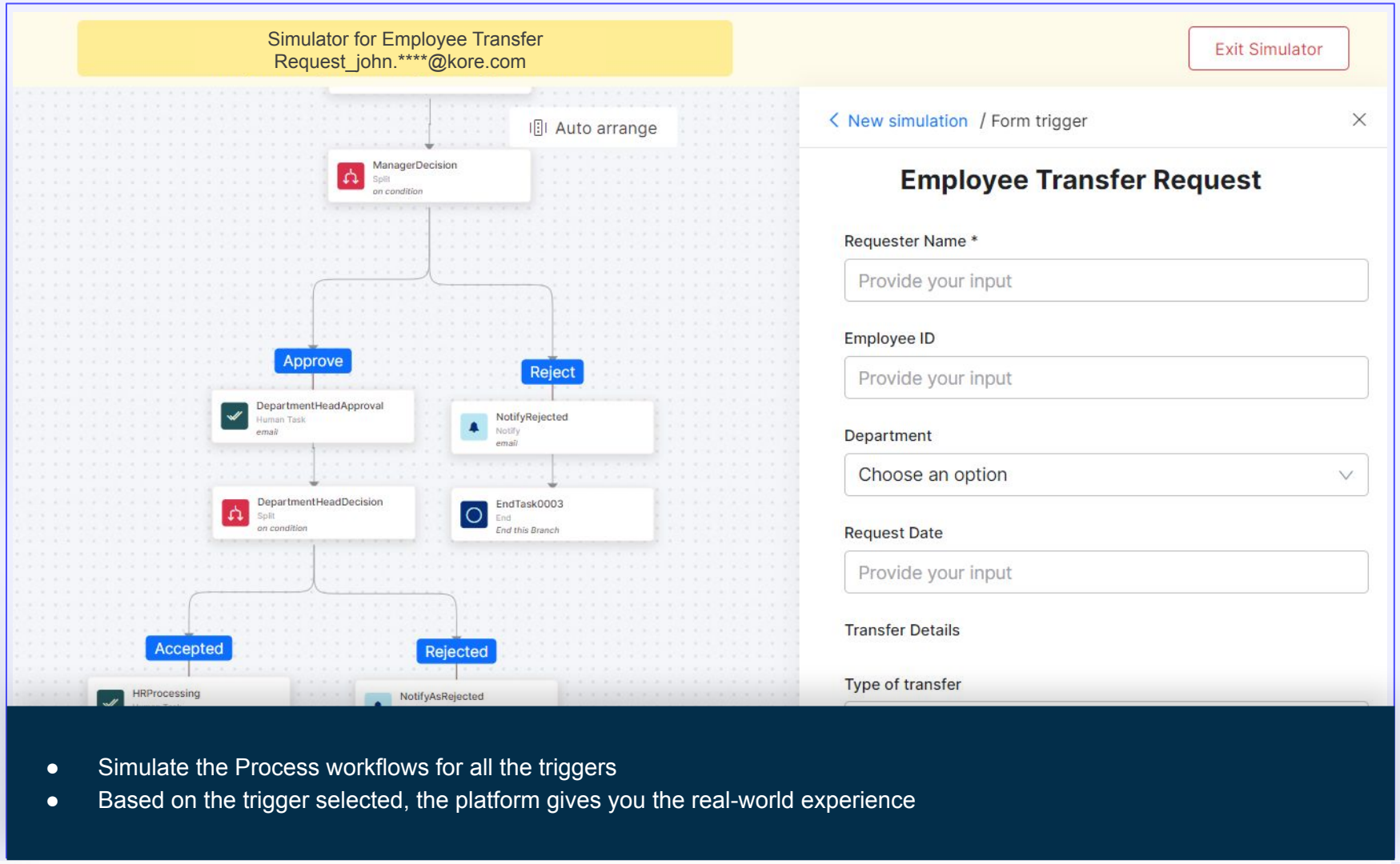


- The Drag-n-drop Process Flow Builder in XO Platform lets you develop Process Apps that handles multi-approval and multi-user workflows

Test the Process Performance Instantly

Platform

- Conversational AI First
- Form Builder
- Multi-step, Multi-user
- **Process Simulator**
- Experience Portal
- Dashboards

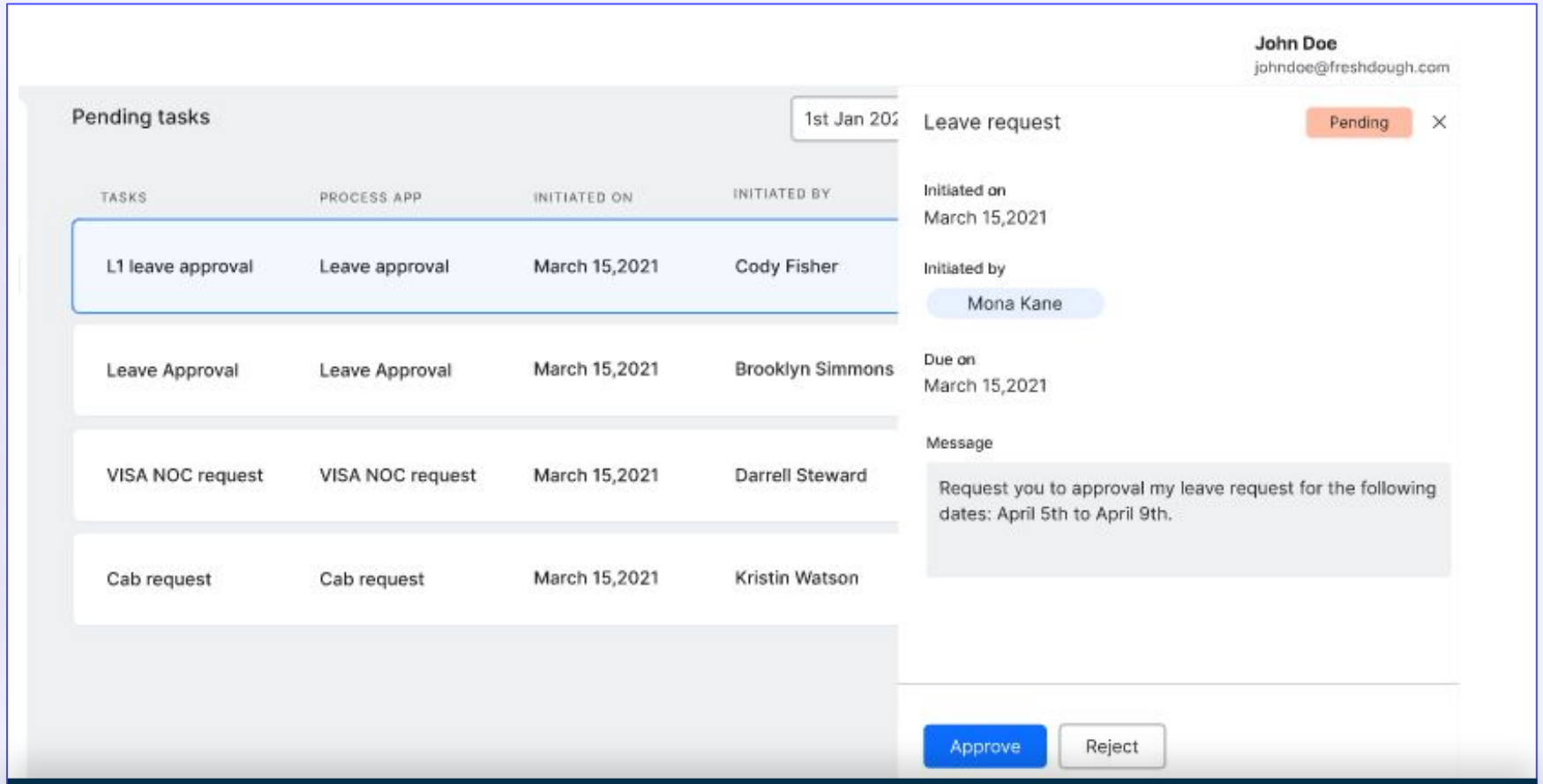


- Simulate the Process workflows for all the triggers
- Based on the trigger selected, the platform gives you the real-world experience

Stay Organized by Taking Action at the Right Time

Platform

- Conversational AI First
- Form Builder
- Multi-step, Multi-user
- Process Simulator
- **Experience Portal**
- Dashboards

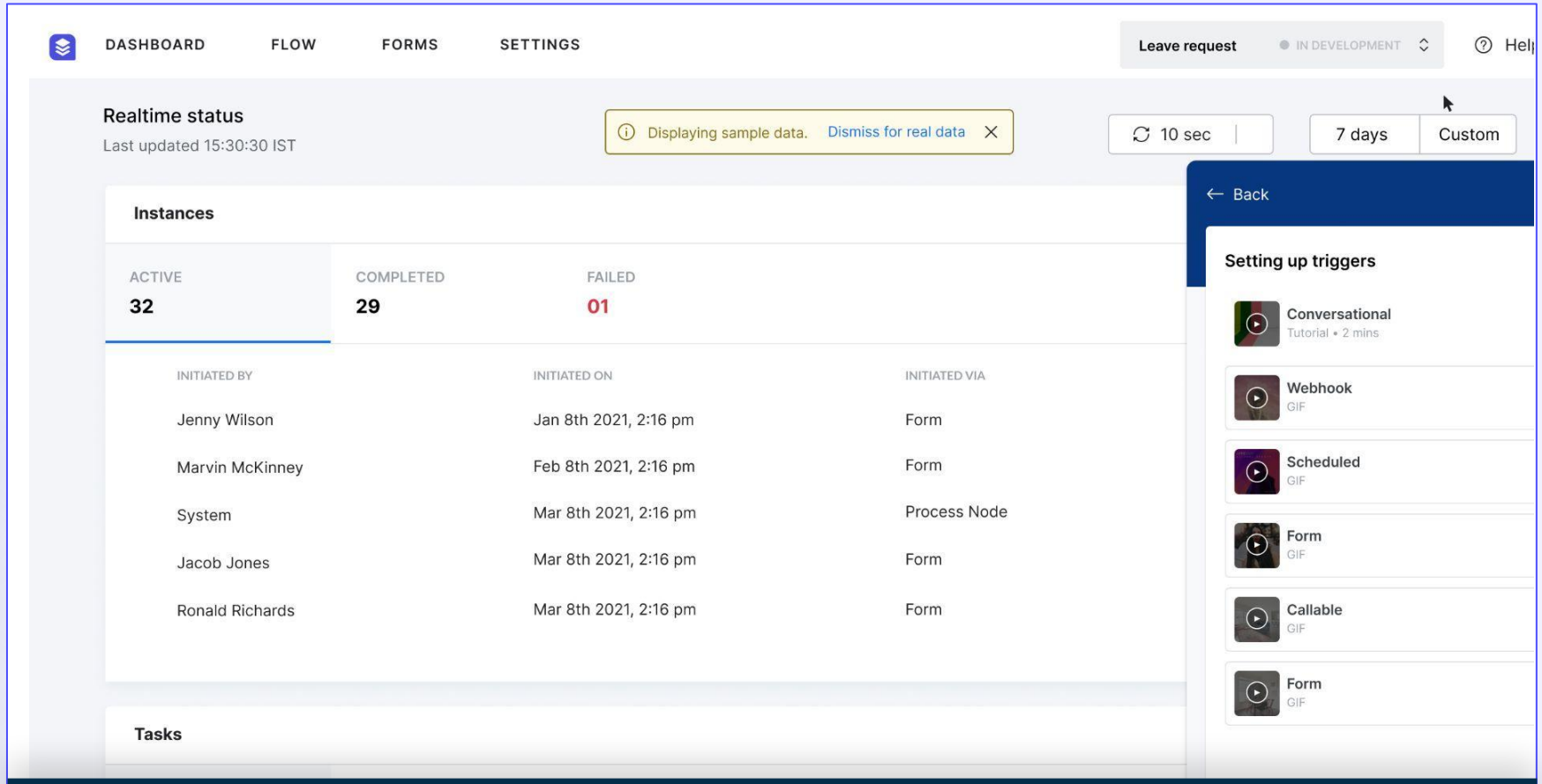


- The platform presents the list of all the pending, overdue, completed and escalated requests for your work.
- It allows you to take action at the right time and stay productive.

Optimize Your Assistants Using Data-driven Insights

Platform

- Conversational AI First
- Form Builder
- Multi-step, Multi-user
- Process Simulator
- Experience Portal
- **Dashboards**



- Enhance Performance by acting on critical data points
- Track usage metrics, tasks count, usage of triggers, task trends, and workload on assignees

Scalability, Extensibility and Deployment



- Scalable infrastructure (horizontal scaling)
- Successful load test for **thousands of concurrent users**
- **Botkit SDK** provides a set of libraries, tools, code samples for you gain complete control of the virtual assistants
- API authentication using the **JSON Web Token** (JWT)
- On-premise, cloud and hybrid deployment
- Standard backend infrastructure components
  - (NodeJS, MongoDB etc.)

Enterprise-Grade Security & Compliance

Platform



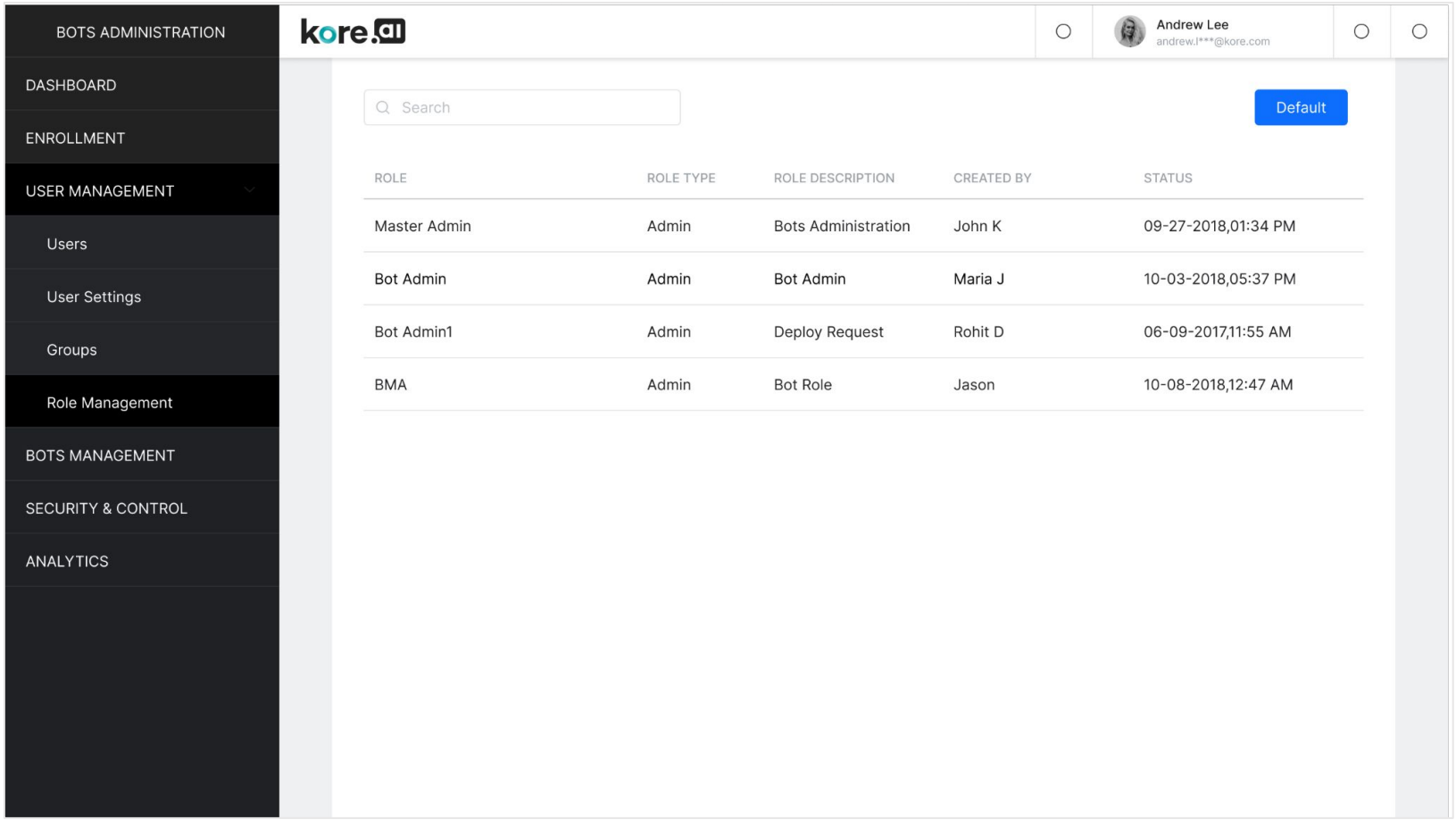
- SOC-2 certified
- Two-factor authentication
- Single Sign-on
- Data archiving and retention, with **end-to-end data encryption**
- Integrated System Authentication, leveraging basic **auth, oauth, or API keys** for user authentication
- Secure Messaging with **AES encryption** at rest and in transmission
- Redaction options to secure sensitive user information

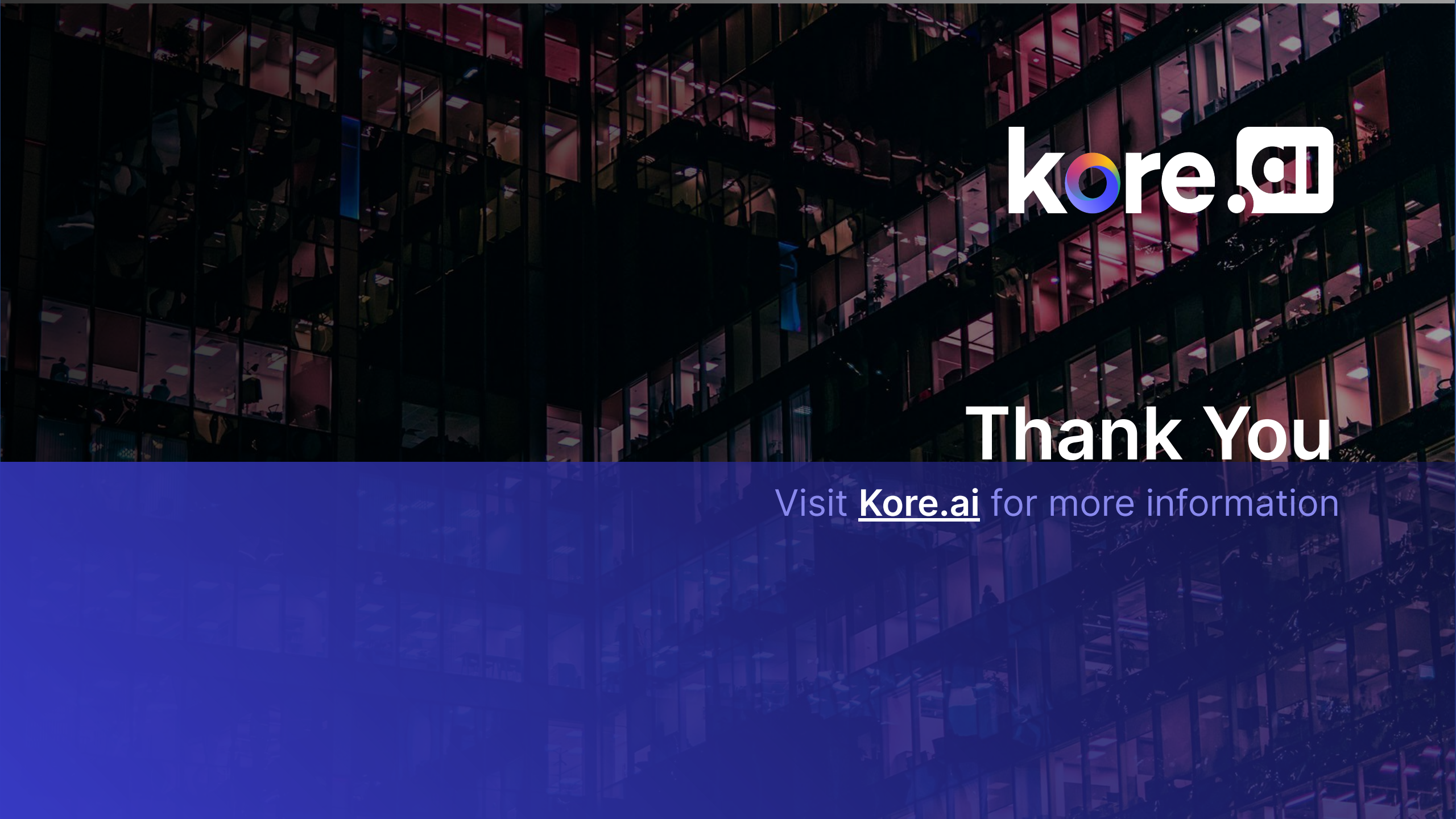
Admin Console

A comprehensive dashboard to access relevant information for the Business and IT Managers at a single click

Platform

- Efficiently manage the **assistant's usage**
- Supports **maker-checker process** for virtual assistant publishing
- **Role-based** admin and access control
- Ability to **recall a task** at the intent level or channel level without writing a single line of code
- **Task-level and assistant-level metrics** for business users




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