



## Hooray!

### We're so pleased to be embarking on a strategic partnership with Five9!

Together, we offer innovative solutions to businesses that operate small to medium-sized contact centers, and who need technology to help them work efficiently and profitably.

This Welcome Package provides detail on CallFinder's speech analytics solution with call quality monitoring and scoring features, including:

- › CallFinder's Product Overview
- › Security Protocols
- › Business Applications for CallFinder Speech Analytics
- › Automated Quality Monitoring Business Case
- › And more!

If you have questions or would like to schedule a demonstration of CallFinder's speech analytics and automated call scoring platform with one of your clients, please do not hesitate to contact a CallFinder Speech Analytics Specialist! We've included our contact information on the last page—so hold on to it!

Here's to a successful strategic partnership!

— The CallFinder Team



NOT FOR DISTRIBUTION OUTSIDE OF FIVE9



# Corporate Facts

About CallFinder

## The Facts

<b>Headquarters:</b>	South Burlington, VT, USA   1-800-639-1700
<b>Market Focus:</b>	Small to medium size businesses across a wide range of industries including retail & wholesale, catalogers, finance and banking, insurance, manufacturing, utilities, and more.
<b>Core Products:</b>	Cloud-based speech analytics Automated quality monitoring Automated agent scorecards
<b>Data Security:</b>	We take the security and protection of your data seriously. CallFinder protects your business' information in a secure Telco datacenter while supporting key industry security standards like PCI, data redaction, and HIPAA compliance.
<b>Competitive Advantages:</b>	Designed for both reluctant and experienced technology users. All customers receive one-on-one training and support with our MyAnalyst service—a dedicated speech analytics specialist.
<b>History:</b>	Subsidiary of 800 Response Marketing, LLC. Routing, tracking, recording and processing hundreds of millions of phone calls since 1990.

## What Is CallFinder?

Delivering Affordable and Easy to Use Speech Analytics CallFinder is a leading provider of cloud-based speech analytics that is affordable, and easy to use for optimizing agent-customer interactions across the contact center. Our powerful solutions enable businesses to:

- › Easily record and analyze conversations to gain visibility into the voice of customers
- › Automate quality monitoring processes
- › Manage agent script compliance
- › Enhance workforce training
- › Analyze and improve business processes
- › Uncover cost savings
- › Discover revenue opportunities
- › Improve customer experience

## What Does CallFinder Do?

CallFinder systematically converts agent-customer interactions into minable data to automatically report actionable intelligence for immediate application to reduce operational costs, improve agent performance, and enhance the customer experience. CallFinder is designed for use by non-technical and experienced users alike. Our user-interface is intuitive and easy to navigate to instantly deliver insights into what agents are saying and how customers are

responding. We offer world-class support to all customers, all the time. A designated CallFinder Specialist will work with you and your team to shepherd through the discovery and implementation of CallFinder to ensure a quick time to value to meet business objectives.

### How Does CallFinder Work?

CallFinder quickly scans thousands of phone conversations in a systematic way so that actionable trends begin to emerge, ultimately transforming unstructured, unleveraged data into insights that can be readily examined by all levels of corporate management and immediately implemented as strategic initiatives. CallFinder processes pre-recorded files using a patent-pending speech analytics technology without requiring customers to route their calls through our telecom platform. Customers simply send their call recordings and metadata to us for processing, and then access their call searches, audio analytics, call scoring, and enhanced call data reports through the CallFinder user interface. CallFinder can process most call recording formats, including MP3, WAV, VOX, AIFF, and more.

### Benefits

Cloud-based speech analytics offers real-time analysis of customers' needs at a dramatically lower cost for implementation, time to value, and support when compared to premise-based solutions.

- › Cloud-delivery is flexible and scalable for any business, no IT resources needed
- › No up-front capital, licenses, costs or software
- › Automated and dashboard reports for quick analysis
- › Simple integration with CRM & lead management systems

### Competitive Advantages

- › Designed for both entry-level technology reluctant users and experienced users.
- › One-on-One training and support with a dedicated speech analytics specialist.

### Customers/Market Segments

- › Contact Centers
- › Education
- › Healthcare
- › Manufacturing
- › Retail/Catalog
- › Travel/Tourism



PRODUCT OVERVIEW

# Speech Analytics & Automated Call Scoring






## Who We Are

Cloud-based Speech Analytics.  
Powerful. Affordable. Easy.

CallFinder® is a market-leading provider of cloud-based speech analytics that are powerful, affordable, and easy for small to medium-sized businesses to improve agent performance and customer experiences.

We deliver our highly scalable technology across a wide range of industries including retail & wholesale, catalogers, finance and banking, insurance, manufacturing, utilities, and more.

All CallFinder clients are supported by MyAnalyst, a service that dedicates a speech analytics specialist to ensure that businesses optimize the value delivered with CallFinder.



The technology [is] easy to implement and start using to mine for keywords and phrases. The CallFinder Specialists we work with are highly professional, enthusiastic and intelligent, and they have our full confidence.

—

**Vice President**

*Health Care Industry*



## How CallFinder Works

CallFinder indexes and categorizes 100% of your customer-agent interactions in near real-time, transforming the unstructured, unleveraged data contained within conversations into actionable business intelligence.

With CallFinder, you can create searches to aggregate data into designated categories and generate automated reports to inform your business of what customers are saying and how agents are performing.

## Sort. Tag. Categorize.

Call categorization is a critical piece of indexing and analyzing the thousands of conversations taking place between your employees and your customers every day. With automatic categorization of conversations using customized key phrases for your business, you can easily access, review, and analyze calls to obtain business insights, identify conversation patterns and trends, and make strategic decisions to move your business forward.



When I first saw CallFinder in action, I knew it was a solution we needed immediately to improve our operations.

**Contact Center Manager**

*Home Products Industry*

## Automated Call Scoring

You need to assess individual agents and teams. With CallFinder, you can accomplish both with consistency and accuracy.

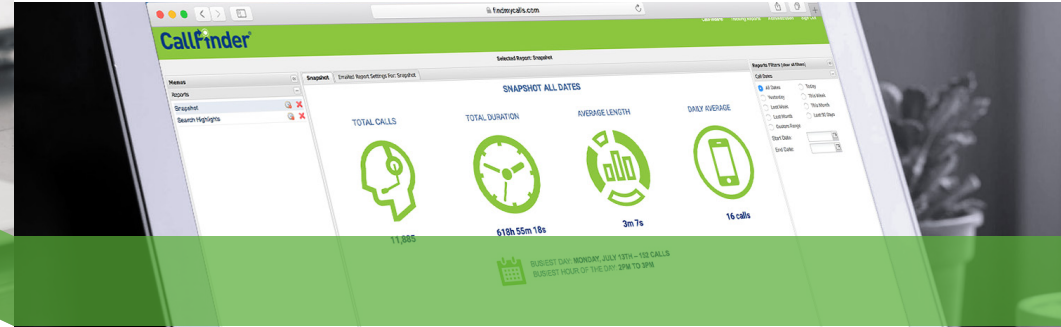
You'll gain a comprehensive understanding of how your agents are performing with call scoring. CallFinder enables the precise review of every call your agents field, pinpointing areas where they are struggling while highlighting their strengths.

This allows you to facilitate and track individual agent and team progress by setting goals and formulating metrics around company standards and procedures. CallFinder allows you to develop a reliable method for scoring, helping you to avoid calibration issues by applying consistent methodology company-wide.

Let CallFinder help you accelerate agent training and enhance skill-building by providing timely feedback with real-time call review and automated delivery of scorecard reports.

## Applications

Businesses use CallFinder to better understand the big picture, including the impact of agent performance, and the effect on the customer experience. With our speech analytics and quality monitoring technology in place, you have the tools and insights to close knowledge gaps that exist in any department or business unit, and leverage the intel gained to make operational and organizational improvements that contribute to a healthier bottom line.



With CallFinder, you can easily and affordably:



### Automate Quality Monitoring

Eliminate manual listening and scoring and deliver a consistent and unbiased scoring methodology for all agents, while scoring 100 percent of their calls.



### Improve Agent Training & Coaching

Automatically pinpoint agent knowledge gaps and problematic or exemplary behavior to pave the way for coaching opportunities that improve performance, productivity, and call-handling strategies.



### Increase Agent Script Compliance

Automate and standardize script compliance monitoring practices while gaining insight into agent behavior, allowing improvement to take place at a lower cost than manual monitoring and evaluation methods.



### Monitor Sales & Marketing Effectiveness

Gain insights into customer behaviors and purchasing trends by capturing customer conversations. You'll gain a wealth of knowledge to realize your position in the market and better understand your customers' preferences.



### Ensure Regulatory Compliance & Risk Management

No matter how simple or complex your business and agent scripts may be, CallFinder can categorize compliant and non-compliant calls every step of the way to mitigate risk.

# Your Data



## Data Security

We take the security and protection of your data seriously. CallFinder protects your businesses information in a secure telecom data-center while supporting key industry security standards like PCI and HIPAA.



## Data Redaction

Data redaction is the suppression of sensitive data, such as any personally identifiable information (PII) like social security numbers, credit card numbers, and other private information that your customers may share with you in order to conduct business. CallFinder has the ability to redact this sensitive call data during the processing of conversations, preventing users from accessing confidential information, and thus protecting your customer information, and your business reputation.



## PCI Compliance

If you process payments over the phone, we have you covered. CallFinder is a PCI certified provider of call recording and speech analytics solutions. Through a combination of advanced applications, we will redact credit card numbers, social security numbers, and other personally sensitive information that is being exchanged during agent-customer interactions. Our speech analytics specialists can provide you with more details on how we accomplish PCI DSS and our certification and validation.



## Contact Us

We are always available to answer questions you have about the security of your data. Feel free to contact us for more information on the security of your data when you work with CallFinder.

# Delivery Options

### We'll Record For You

- ▶ We carry your call traffic and route your inbound calls to any phone number (toll-free or local) and our network records 100% of the inbound call traffic
- ▶ CallFinder's powerful speech indexing platform processes your calls in real-time and automatically categorizes them based on your search definitions
- ▶ Access your recordings, call categories, agent-customer analytics, and call reporting through the CallFinder user interface following call completion

### Send Us Pre-Recorded Files

- ▶ Send your call recordings and meta-data, in virtually any recording format, to CallFinder for processing, either as they happen or in batches
- ▶ CallFinder's powerful speech indexing platform processes your files and automatically categorizes the calls based on your search definitions
- ▶ Access your call categories, agent-customer analytics, and call reporting through the CallFinder user interface

# Onboarding with MyAnalyst Services

We pride ourselves on providing robust one-on-one training and support to get businesses comfortable with the interface, and adept at creating and refining searches to ensure they are using CallFinder to the fullest extent.

With MyAnalyst support services, a designated speech analytics specialist will work with you and your team through the implementation and discovery phases, and help build and refine call categories, search phrases, and scorecards to meet your objectives.

CallFinder's unique support program and team of speech analytics specialists is unmatched and one of the many elements of why working with us is the right choice for small to medium-sized businesses.



# Let CallFinder Help Your Business

CallFinder will automatically report on agent performance and customer experience while extracting vital business intelligence that reveals insights to help you reduce costs, improve agent performance, and provide the optimal customer experience.

### Businesses use CallFinder to:

- ▶ Gain visibility into the voice of their customers
- ▶ Monitor agent script and regulatory compliance
- ▶ Enhance workforce training
- ▶ Manage quality monitoring
- ▶ Analyze and improve business processes
- ▶ Discover revenue opportunities



### CallFinder will help your business gain insights and apply context to key performance metrics like:

- ▶ AHT – Average Handle Time
- ▶ CSAT – Customer Satisfaction scores
- ▶ CES – Competitive intelligence
- ▶ FCR – First Call Resolution rates
- ▶ NPS – Net Promoter Scores
- ▶ Call Conversion Rates



## Get In Touch

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[mycallfinder.com](http://mycallfinder.com)



1-800-639-1700



1795 Williston Road, Suite 200  
South Burlington, Vermont, USA



# CallFinder Applications

## How CallFinder Can Help You

Companies looking to improve agent performance and customer experience use CallFinder to capture business intelligence relevant to all areas of their organization including sales, customer service, marketing, operations, and more. Listening to what your customers want and using those insights to improve the customer experience will have a direct impact on the bottom line. Here's a myriad of ways our customers use CallFinder:



### Automated Quality Monitoring

CallFinder's Automated Call Scoring and Quality Monitoring affords supervisors an accurate view into agent performance, enabling them to spend more time managing and coaching agents to call perfection. CallFinder delivers an automated quality scorecard by teams and agents, scoring 100% of your calls.



### Sales Effectiveness

CallFinder will help supervisors pinpoint why some agents are more successful than others so best practices can be employed across all agents to improve overall sales results. Using CallFinder, you'll gain the ability to perform faster analysis of sales conversion success factors, and easier operationalization of best practices.



### Regulatory Compliance & Risk Management

While managing the complexity of regulatory compliance for agents and the data they capture is a daunting task, speech analytics can be employed to automatically report on what was said to mitigate associated compliance risk and the potential for fines and penalties. The return on investment for CallFinder can be measured by the avoidance, or reduction, of litigation damages, and regulatory fines, often resulting in the solution paying for itself in weeks or months.



### Marketing Effectiveness

With CallFinder, marketing teams can extract actionable voice of the customer and marketing performance insights directly out of customer phone calls at a much lower cost, and with more immediacy, than traditional market research. CallFinder will reveal insights on customer behaviors and purchasing trends for all of your products and services, to optimize marketing campaigns and promotions in near real-time so adjustments can be made to maximize marketing spend.



### Agent Script Compliance

Contact centers often employ scripts to ensure a consistent approach to customer interactions and to deliver an excellent customer experience. CallFinder will automatically score the agent side of a conversation for following script compliance guidelines based on key phrases that are present or absent in the conversation so supervisors know where agents are following best practices.



### Agent Training & Coaching

A challenge for any contact center is to identify skill-gaps so appropriate training is delivered to improve agent skills and call outcomes. With traditional monitoring, it is difficult to evaluate each and every call handled by the agents, thus producing inconsistent results. CallFinder's speech analytics technology and call score cards will automate your agent evaluation process and make training new and current agents easy.

# Automated Quality Scoring

## Current State of Contact Centers

Contact center executives are evaluated on metrics that report operational efficacy and cost management. With U.S. contact center staff and agents averaging 75% of organizational costs, the ability to measure and improve output and efficiency of agents is critical. Employing automated agent scoring provides supervisors with an accurate view of agent performance while reducing costs associated with manual listening and scoring methods.



### Challenge:

**Typical Quality Monitoring is Manual & Costly**

Agents handle six hours of calls each day with a 4-minute AHT, equating to 90 calls per day, or 1,800 calls per month.

- ▶ **Time Intensive for Managers:**  
Manually review & score 5–10 calls / agent / month, just 0.56% of all conversations.
- ▶ **Limited Data Reliability:**  
Monitoring less than 1% of calls is a risky representation of performance that does not account for high and low-performing days for an agent.
- ▶ **Costly & Inefficient Outcome:**  
With the average ratio of 20 agents:1 supervisor, scoring 10 calls / agent / month requires 13+ hours each month in manual monitoring.



### Solution:

**Speech Analytics with Quality Monitoring Scorecards**

CallFinder provides significant time savings with an automated scoring and reporting process for unlimited hours of calls.

- ▶ **Efficient & Fast:**  
Eliminates manual monitoring and scoring practices.
- ▶ **Unbiased Scoring Methodology:**  
Evaluates 100% of calls for every agent—not just a small sample—eliminating bias and human error.
- ▶ **Consistent Evaluations:**  
Scores every agent on the same parameters and expectations, delivering accurate evaluations across team members.



## Benefits of Automated Quality Monitoring From CallFinder

Key among the tools in management’s arsenal to improve agent quality and reduce costs is the automated quality monitoring scorecard. With CallFinder speech analytics, more time can be devoted to managing and coaching agents for improved performance, better handle times, and better customer experiences.

## CallFinder User Story

Automated quality monitoring is employed by our customer to monitor, measure, and ensure excellent interactions between their agents and their customers. Call center supervisors create automated scorecards within the CallFinder interface to capture key performance metrics that are expected to be met throughout all interactions. The scorecards consistently evaluate every agent-customer interaction in four main areas of each call:

- › Proper greeting
- › Presentation skills
- › Call management
- › Proper closing

Additional call metadata is automatically assessed on every call, including average handle time (AHT) and average talk time (ATT). If an agent population is scoring at or above the mean across these skill categories, it points to systematic application issues and/or a training inadequacy.

The knowledge gained by our customer allows management to step in and address these shortcomings with individuals and teams immediately to rectify and improve the experience being delivered to customers, as well as to improve efficiency across the contact center.

## How To Apply Automated Quality Monitoring

To fully leverage CallFinder's speech analytics solution with automated quality monitoring and call scoring features, the following example of a practical application of the technology is considered best practice:

1. Consider the metrics you would want to monitor and score in an agent interaction; this may include service quality, customer handling skills, script compliance, or other metrics. Translate each metric into the actual words and phrases of a conversation that represent each metric in your scorecard.

**Example:** Scorecard Metric "Conflict Management": An agent must apologize for a customer's dissatisfaction, take ownership of the problem, and provide a solution. Examples of successful conflict management phrases may be:

- › "I apologize for the issue you are experiencing."
- › "I can definitely help you with that."
- › "I will extend your warranty to cover your damages."

2. Use speech analytics to search for the presence, or absence, of these words and phrases.
3. Create searches that are grouped into categories that will comprise each scorecard metric.
4. Choose a metric scoring method, like a raw score or a 1–5 scale, and weights for each metric in the scorecard.
5. Report on and share results with relevant departments and team members using the automated reporting functionality in CallFinder.

**Contact us to learn more about easily assessing agent performance with automated quality scoring from CallFinder.**

# Security Protocols

We Protect Your Data

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## Security Protocols to Protect Your Data:

CallFinder is a subsidiary of 800response and 800 Response Information Services LLC. The 800 Response Information Services platform incorporates several levels of security:

- 1. Physical Security:** Our platform is hosted at a world-class Verizon Business Systems Data Center. Access to the Data Center is controlled by guards, 24 x 7 x 365; platform hardware is deployed in locked cabinets; external backups are stored under lock and key in a remote location.
- 2. User Security:** Each User is granted permission to access calls and meta-data associated with specific accounts. In addition, each User is granted or denied privileges for certain platform features, e.g., listening to recordings, viewing personally identifiable information, reading/writing notes & tags, et al. Our platform also uses industry-standard techniques to allow Users to reset a forgotten password by sending an email containing a secure password-reset link to the User's registered email address.
- 3. Application Security:** Each time that a User requests information from our platform via their client's browser, the platform automatically authenticates the User's credentials, and ensures that they're authorized to see the information requested - allowing us to modify User Security in real time. In addition, the platform does not permit direct user access to audio recordings on disk, and all User requests are timestamped and logged, in detail, for audit purposes.
- 4. Audio Recording Playback:** All requests to play audio recordings via our Tracking Site interface are mediated by a multi-step validation, authentication and secure transmission process, and transmitted using Hyper Text Transfer Protocol Secure (HTTP + TLS or HTTPS), the secure version of the standard protocol used by all web browsers to communicate with web servers.

## Access to Your Data (roles within CallFinder and external contractor/entities)

Within CallFinder, customer data is accessible to members of the customer service and technical services departments, as well as to your account representative and executive sales management. In addition, customer data is accessible to those members of the information services team, comprised of five professionals, who are responsible for database operations and maintenance, i.e., system administrators and developers.

## Steps CallFinder Takes to Protect Your Data

CallFinder rests upon a network and software architecture, as well as security policies and procedures which comply with requirements of the Payment Card Industry (PCI) Data Security Standards (DSS), and as such can complement customers' own compliance efforts. Call recordings which may contain sensitive authentication data (SAD) will be transmitted to CallFinder from customer premises using Transport Layer Security 2.0. Any SAD encountered in call recordings will be automatically removed and replaced with silence as part of CallFinder's audio ingestion and redaction processing.

In addition, CallFinder regularly assesses its compliance with the PCI DSS core requirements:

**Build & Maintain a Secure Network**

Requirement 1: Install and maintain a firewall configuration to protect cardholder data

Requirement 2: Do not use vendor-supplied defaults for system passwords and other security parameters

**Protect Cardholder Data**

Requirement 3: Protect stored cardholder data

Requirement 4: Encrypt transmission of cardholder data across open, public networks

**Maintain a Vulnerability Management Program**

Requirement 5: Use and regularly update anti-virus software

Requirement 6: Develop and maintain secure systems and applications

**Implement Strong Access Control Measures**

Requirement 7: Restrict access to cardholder data by business need-to-know

Requirement 8: Assign a unique ID to each person with computer access

Requirement 9: Restrict physical access to cardholder data

**Regularly Monitor & Test Networks**

Requirement 10: Track and monitor all access to network resources and cardholder data

Requirement 11: Regularly test security systems and processes

**Maintain an Information Security Policy**

Requirement 12: Maintain a policy that addresses information security

**HIPAA Compliance at CallFinder**

CallFinder is currently serving customers who are required to be HIPAA-compliant, and we are ready to include the appropriate language in our Service Order Form to address HIPAA's rules, including the Standards for Privacy of Individually Identifiable Health Information, as may be required by the customer. We are prepared to execute the appropriate Business Associate Agreement upon request.



# Maker of Home Care Products for Seniors Uses Call Recording with Speech Analytics to Improve Contact Center Performance

## Client Profile

### About

A leading provider of home care products for seniors

### Call Volume & Handling

- > Over 2,000 inbound calls each month
- > 20 agents answering calls
- > 1 manager

### Services

- > CallFinder® Speech Analytics

## Background & Challenges

The home care products maker was using standard call recording to monitor their internal contact center, but there was no automated or efficient way to categorize and identify calls based on search criteria. Finding the most important calls to review and use as examples to train and improve agent performance was cumbersome and time consuming.

## Strategy

The director of operations received a demo of CallFinder's cloud-based, automated speech analytics solution and knew the advanced technology would not only save time, but would transform their call monitoring to help the company better analyze agent performance and help discover customer objections. Together, the director of operations and the contact center manager set goals for the solution, and worked with a CallFinder Specialist to create distinct searches in the CallFinder interface. Searches were based on precise keywords and phrases for the phonetic indexing solution to automatically scan and organize calls into four defined management objectives.

## Key Objectives

- > Discover customer objections and address through agent coaching initiatives.
- > Monitor specific script transition times to measure how successful each agent is at following the proven script triggers that practically guarantees a scheduled appointment.
- > Monitor calls for key questions that agents are required to ask in order to comply with TCPA regulations.
- > Segment callers who are renting their homes, versus calls coming in from home owners.

## Results

- > 59% increase to inbound lead conversion rates.
- > 100% compliance with TCPA regulations, and reduction in litigation risk.
- > 18% reduction in call monitoring hours.

"When I first saw CallFinder in action, I knew it was a solution we needed immediately to improve our operations," says the contact



"With CallFinder, it takes me seconds to find the calls I want to listen to – the data and the recording is right there. CallFinder is one of the view windows I have up on my screen every moment of the day. I monitor our searches so that I can take action and work with our agents to improve the experience we provide to our callers, and help them improve their close rates"

**DIRECTOR OF OPERATIONS**  
Home Care Products Industry

center manager.

According to him, he is saving seven hours each week, approximately 18% of his time, now that the company has implemented CallFinder's cloud-based speech analytics solution into their busy contact center. "With our previous call recording solution, it would take me 10 to 20 minutes to locate just one call with content I was looking for."

CallFinder's phonetic indexing technology is much faster, finding calls automatically and sorting them according to company's needs almost immediately once the conversation has ended. "CallFinder's solution takes only 30 seconds to find a call matching the criteria I'm looking for", says the contact center manager. "With CallFinder, it takes me seconds to find the calls I want to listen to – the data and the recording is right there."

### **Creating Checks and Balances for Agent Performance**

The company created a system of checks and balances to analyze and score each agent during the call handling process. CallFinder instantly scans each inbound call for the presence, or absence, of key phrases contained in the script, and which agents have been trained to follow to the exact word. The new process monitors and measures agent performance with the goal of making sure that each agent is following the call handling process correctly, as they have been trained to do.

According to the contact center manager, "The whole point is for the agents to make "perfect" calls and apply the training they've received. CallFinder is instrumental in analyzing each conversation to provide the data we need to categorize each agent based on their performance, and then assign them to the A Team, or the B Team. Their goal is to be on Team A – achieving perfect call-handling scores."

He continues, "This is ultimate accountability for all of our agents. Since those that under-perform are on the B Team, the A Team members field the majority of our calls. Since implementing this new scoring process using CallFinder, the A Team has increased our appointment setting conversion rate by 59%, going from 32% conversion to a record setting 51%."

### **Discovering Customer Objections and Improving Agent Training**

A main goal for the contact center manager is to continually look for ways to improve the performance of his agents, which will ultimately improve revenue. With calls coming in to their center each day, having an automated solution do the work of finding relevant calls is essential.

For example, he likes to use customer product objections as key indicators on how to coach and train his agents. To do this, he uses actual calls that are handled by specific agents to point out areas of opportunity for improvement and course correction, which will develop their individual success rates, as well as their performance for the company.

He explains one use-case example, "I use CallFinder to track and monitor those calls where a customer raises a product or price objection. Specifically, we use the search definition capabilities within CallFinder to categorize calls where the lead is asking for a "ball park estimate." The occurrence of this phrase is a good indication to us that the lead is going to fall out, become a non-lead and not turn into a customer." He also mentioned that the use of "ball park estimate" by a caller is an automatic flag that he needs to listen to those calls, locate the agent that handled each of those calls, and provide coaching and instruction on how to avert those callers from wanting a rough cost estimate, and move them to schedule an appointment for a specialist to come to the house, build a relationship and provide a custom quote.

### **Monitoring Script Transition Times**

The call filtering capabilities of CallFinder, and the power of mining calls for unique phrases, has helped the company discover call



"Our experience with CallFinder was fantastic. The specialist helped us every step along the way with creating searches. During the initial set-up and orientation period, we gave her a lot of information to digest, and she quickly gained an in-depth understanding of what our objectives for CallFinder were, and she delivered on time. ... after completing the training phase of using the CallFinder interface, I am comfortable building searches on my own."

**CONTACT CENTER MANAGER**  
Home Care Products Industry

duration and script transition times that are proven to lead to a successful call. “With just one CallFinder search, we have narrowed down the parts of a call that agents need to hit at very specific time stamps within the conversation that indicate that a call will convert,” says the contact center manager.

Using the data contained in their calls, they have turned the knowledge gained into a tactical plan for their agents. They built a specific phrase and transition into their script, precisely at the 6-minute mark of a call, which once reached and stated by the agent all but guarantees that the caller will schedule a consultative appointment at their home. They refer this as the “one call close.”

The outcome for this objective, according to him, is that “CallFinder has provided us with the ability to discover trends and build a sophisticated approach to monitoring calls that are bound to turn into scheduled appointments.”

### Tracking Agent Compliance with TCPA Regulations

Contact centers are under intense scrutiny to abide by federal regulations when it comes to the area of telemarketing. For this home care products retailer, this means that every agent on every call, even inbound calls, must ask for the caller’s permission to call them back, particularly if they are calling in from a cellular device. The first search definition that they created was to filter calls to ensure they maintain compliance with the regulations. By establishing search criteria with specific phrases, and adding those phrases to the contact center’s script, the contact center manager is certain that his agents are achieving 100% compliance, and are not at risk for litigation when it comes to the TCPA (Telephone Consumer Protection Act). The contact center manager checks the filters and statistical reports every day to monitor the filter and assure their agents are staying on script.

### Segmenting Calls by Home Owners vs. Renters

In addition to the primary objectives, the company appreciates the power of CallFinder to categorize calls by caller-type; home owners as opposed to home renters. They can sort calls easily by creating searches based on terminology agents use as part of the script to identify the qualified leads and focus on those that will be more likely to convert into an appointment. The company knows that if a caller is renting their home, they are not a viable lead due to the modifications that are necessary to install their products, such as stair climbers and walk-in tubs. The available statistical summary for each defined search also provides the director of operations and the contact center manager with data they need to keep a pulse on the market and their marketing efforts to ensure they are targeting home owners versus renters.

The contact center manager explained that he has been working in contact centers and with contact center managers for years. “I always wanted access to a technology like CallFinder’s, but either we didn’t have the budget, or we didn’t want to settle for an inferior solution. Once the director of operations told me he was working with CallFinder to implement their call recording and speech analytics solution, I was excited. Having the ability to search calls for certain phrases and variations on those phrases is huge.”

### The CallFinder Experience

According to the both the directors of operations, “We have been working with CallFinder since September 2013 to use their call recording and analytics solution to monitor levels of script compliance, appointment setting success rates, and identify training opportunities for our agents. Our experience so far has shown that not only is the technology easy to implement and start using to mine for keywords and phrases, CallFinder also has a finely tuned and exceptional on-boarding process.”

He goes on to say, “The CallFinder specialists we work with are highly professional, enthusiastic and intelligent, and they have our full confidence. We work with many cloud-based technology providers and the CallFinder team easily outshines them with their attention to detail and accessibility. I know they are committed to working with us to identify our goals for the technology, and put it to work to for us so we can effectively analyze thousands of conversations that we’re having every day with our customers.”



“I always wanted access to a technology like CallFinder’s, but either we didn’t have the budget, or we didn’t want to settle for an inferior solution. Having the ability to search calls for certain phrases and variations on those phrases is huge.”

**CONTACT CENTER MANAGER**  
Home Care Products Industry



## Future Expectations for CallFinder

The contact center manager was heavily involved in the onboarding process for CallFinder, and he is the primary user of the solution, although there are other managers in the company's contact center operations who are creating and modifying searches for their own unique needs.

For him, "CallFinder is one of the view windows I have up on my screen every moment of the day. I monitor our searches so that I can take action and work with our agents to improve the experience we provide to our callers, and help them improve their close rates."

According to him, "There are companies out there that are just waiting for a solution like CallFinder to integrate into their contact centers so they can monitor and improve their performance. CallFinder can get them there."

**Contact us to learn more about easily assessing agent performance with automated quality scoring from CallFinder.**

# Pricing Model

How CallFinder's Services Are Priced

## CallFinder Pricing

Commitment/ Hours Per Month	Monthly Fee	Excess Rate Per Hour
200	\$799	\$3.50
300	\$1,149	\$3.25
400	\$1,399	\$3.00
600	\$1,799	\$2.50
1,000	\$2,499	\$2.00
2,500	\$4,999	\$1.50
5,000	\$7,499	\$1.00

⚠️ 100 hours per month available with 2-year term commitments

## Agent Commission

We're proud to have Five9 as a strategic partner in our efforts to provide businesses with professional speech analytics and call quality monitoring solutions. As part of our partner relationship, we are prepared to commission Five9 generated sales of the CallFinder solutions at a rate of 15% so long as the end customer remains active.

As a benefit of our partner relationship, our marketing and sales teams will support your selling strategies, and our product and services teams are ready to assist with integration and implementation.



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# Competitive Landscape

Compare Analytics Platforms

	CallFinder	Verint	NICE	CallMiner	Calabrio	Interactive Intelligence
Flexible and scalable cloud-based delivery	✓	✗	✗	✓	✗	✗
Near real-time indexing & analyzing of calls	✓	✓	✓	✓	✓	✓
Phonetic indexing engine with search speed rivaling speech-to-text engines	✓	✗	✓	✗	✓	✓
Simple integration with CRM & lead management systems	✓	✗	✗	✗	✗	✗
Designed for beginners & tech-savvy users	✓	✗	✗	✗	✗	✗
Speech to Text Engine LVCSR	✗	✓	✓	✓	✓	✓
Email Analytics	✗	✓	✓	✓	✓	✓
Chat analytics	✗	✓	✓	✓	✓	✓
Customized & pre-defined data reports	✓	✓	✓	✓	✓	✓
Full support during onboarding & training	✓	✗	✗	✗	✗	✗
Low per-hour charge to analyze recordings	✓	✗	✗	✗	✗	✗
No per-seat license costs	✓	✗	✗	✓	✗	✗
No IT resources necessary to operate	✓	✗	✗	✗	✗	✗
No capital expense for licenses or software	✓	✗	✗	✓	✗	✗



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# Contact Us

Get In Touch With The CallFinder Team






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