



# Intrado CX

# Mosaic Playbook

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# Overview

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Mosaic is the industry-leading customer experience growth enabler. It delivers exceptional and flexible personal experiences across all channels when you want and need to engage with your customers.

With digital conversations powered by artificial intelligence, Mosaic enables customers to converse dynamically and naturally—as they normally would—with an Intelligent Virtual Assistant that 'understands' dynamic human conversational dialogs.

This playbook explains the value proposition that Mosaic delivers through its expansive functionality and advanced technology. Additionally, an improved and enhanced service delivery model to initially design the customer experience as well as to continuously adjust and improve.



# Mosaic Value Proposition



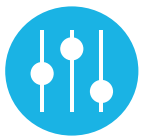
# Customer Experience and Loyalty

Mosaic enables personalized and easy experiences across all channels for your customers when they contact you. Like having your best employee engaged on every interaction to answer questions and facilitate transactions. This is accomplished through identification, personalization & prediction, and intelligent conversation.



## Identification

Mosaic can quickly identify your customers, based on their phone number, account number, and other methods, allowing you to quickly access relevant information about your relationship with them (subscriptions, account status, pending orders, appointments, etc.).



## Personalization & Prediction

Once your customer is identified, Mosaic offers experiences that are personal. We do this by thinking for the customer, by predicting why they are contacting you in the first place, or better yet, reaching out to them proactively. By knowing when a customer typically pays a bill, schedules an appointment, or refills a prescription, Mosaic quickly identifies the common reasons why each unique customer is reaching out, and identifies opportunities to proactively engage to enrich your relationship and brand experience.



## Intelligent Conversation

If a transaction is presented in the form of a conversation, the customer will feel as if they are in control of the conversation and are getting what they need quickly and efficiently, as Mosaic's Intelligent Virtual Assistant (IVA) understands dynamic human dialogs, speech or typed. The customer can speak or type in a natural conversational way and quickly get from initial contact to solved resolution.



This customer experience drives loyalty, as the customer feels the company knows who they are and can solve their requests efficiently. This means the customer will stay with them longer, spend more, and will often refer other customers to boot!

# Cost Reduction

Mosaic lowers costs by ensuring customer service outcomes are solved by the Intelligent Virtual Assistant at a higher rate than previous technologies.

Mosaic provides several cost reducing features, including automating transactions, providing a start-continue-finish customer journey, and transitioning callers from higher cost channels to lower cost channels.



## Automating Transactions

Mosaic enables organizations to automate transactions in new ways that have not been done before. AI-powered advanced conversational automation will relieve the burden placed on the contact center, meaning less people are needed, and those who are needed are focused on the most challenging tasks.



## Start-Continue-Finish Customer Journey

By taking information about the relationship that an organization has with that customer, Mosaic can predict what the customer is trying to accomplish and can therefore quickly create the steps the customer needs to take through the interaction with the virtual assistant.

If handing this information off to the contact center is needed, agents will be more effective with the time they have, as Mosaic can route an inquiry most suited to specific agents. The contact center agent can then pick up where the IVA left off, enabling a start-continue-finish transaction, as opposed to a start-restart interaction.



## Transitioning to a Preferred Lower Cost Digital Channel

With Mosaic's digital transformation capability of voice to digital channel adoption—technology will drive cost reduction and improved experience by meeting your customers where they want to be. With digital chats, combining automation and agent support, contact center agents can support more conversations simultaneously. In addition to agents processing more conversations, improvements in customer experience / Net Promoter Scores\* is common.

\*A Net Promoter Score (NPS) is the percentage of customers rating their likelihood to recommend a company, a product, or a service to a friend or colleague.



## DID YOU KNOW?

By providing the right agent with transaction information already obtained, this can **reduce the average call length by 15-40%**. Faster resolutions result in happy customers with a reduced cost to serve!

# Revenue Generation

Mosaic makes it easier to order, buy, resolve inquiries, and do business. This is done by capturing both new and improved revenue through the transaction and by enabling channel of choice.



## Selecting the 'Right' Agent

While having your best employee engaged in every interaction may provide a best-in-class customer experience, there are instances where this person may not have the knowledge needed for a specific customer need.

Because Mosaic has information about your customer, such as personal information, common reasons for calling, and what they are looking to buy, it can route transactions to the 'best fit' contact center agent when needed.

Let's take the example of a customer from the Phoenix, AZ area who is inquiring about a purchase from a major satellite TV provider. While any given contact center employee might assist with this transaction, it may be even better if the selected agent has knowledge of competitive offerings specific to the Phoenix area and may be more persuasive to this caller.

Using information gathered by Mosaic, the 'best' agent will be contacted faster, improving crucial close rates, reducing handle times, and increasing customer satisfaction.



# Revenue Generation

Continued



## Channel of Choice

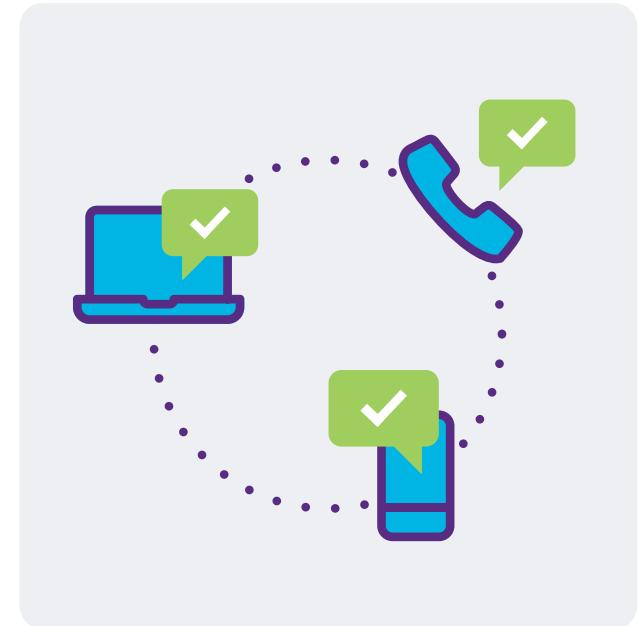
Mosaic offers a true channel of choice experience, allowing customers to swap between communication modes based on needs and preferences.

A customer may begin by reaching out via the web, which leads to a phone call, and then ends with a text. Channel of choice drives revenue by interacting with the customer where they are, allowing them to buy right now. All the while, never having to 'start over' on their journey from initial contact to purchase or resolution.



## Adding Offers

Mosaic can add targeted buying opportunities to transactions. For example, a customer who performs a transaction with a cable company can receive an offer at the back end of the transaction to buy more channels or services.



## DID YOU KNOW?

Intrado helped a leading pharmacy generate more than 8 million incremental prescription fills to keep their patients safe and healthy. This was done by optimizing proactive text messaging and voice messaging. **In the United States, prescription drugs cost on average \$1,200 per person per year.**

Source: [www.bloomberg.com/quicktake/drug-prices](http://www.bloomberg.com/quicktake/drug-prices)



# Debt Collection

Mosaic enables faster and more efficient collection, so debt does not have to be relinquished to an agency.

If a customer falls behind on a payment, Mosaic can communicate with the customer via voice or text message as a reminder. Customers can pay some or all their bill, promise to make a payment, and even schedule a payment on a date that is most convenient for them. This proactive engagement will enable the customer to quickly and conveniently pay, pre-or post-delinquency.



## DID YOU KNOW?

In one instance for a leading entertainment provider, enabling customers to pay their bill via SMS using their credit card on file reduced delinquency rates among their customers by 18%, avoiding costly 3rd party debt collection.



# Speed to Value

Mosaic allows organizations to realize value at an accelerated pace. Due to the enterprise-grade performance and outcomes built into Mosaic, organizations can see decreased costs and increased revenue within weeks as opposed to months and quarters. This is accomplished with Mosaic's "configure vs. develop" capabilities, pre-built interaction modules, and the expertise of our customer experience experts.



## Built-In Functionality

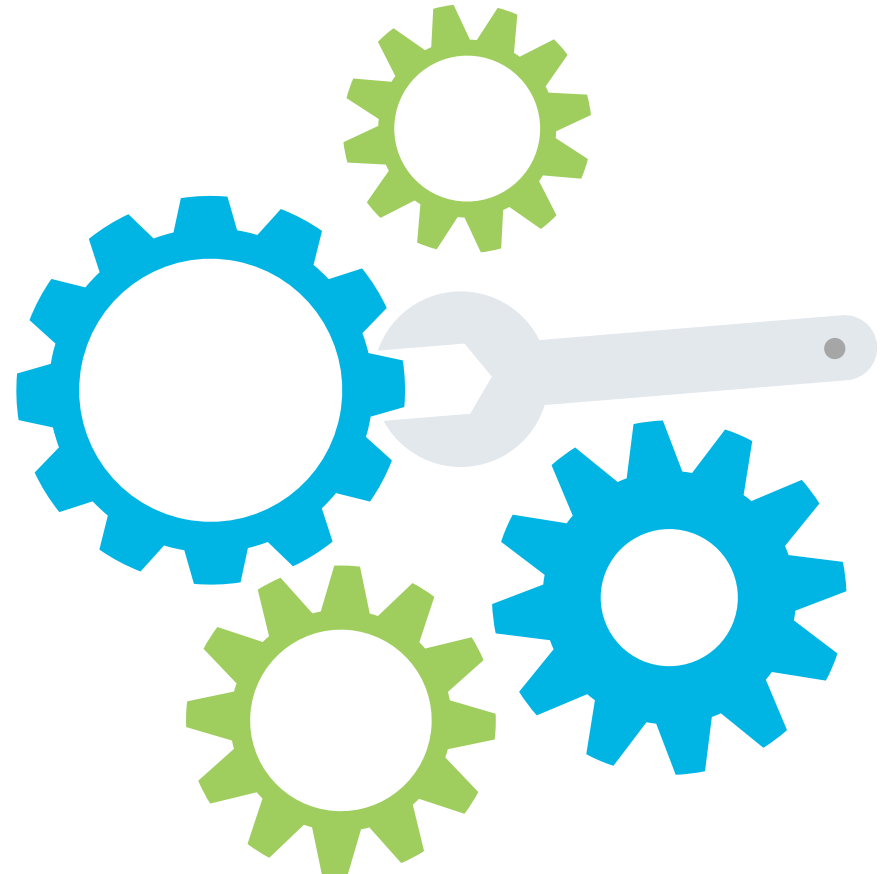
Multiple industries can be served immediately by simply pulling a lever. Where business rules differ (such as accepting late payments or not accepting late payments), these rules are configured in Mosaic to tailor the instance that is provided to the customer at go-live.

We must move at the speed our clients expect us to move to support their business and their customers.



## Integration Expertise

When integrating with legacy systems (such as a unique CRM), because of our extensive experience, this work is performed faster so the benefits of Mosaic can be realized sooner.



# Experience that Guarantees Business Outcomes

With 30 years of experience in deploying over 4,000 applications across multiple industries and channels, our experience in designing human machine interfaces, managing the implementation, and driving optimal performance ensures customers will interact and stay in the transaction—producing desired outcomes.



## Initial Consulting

An initial consult may include a review of current business challenges, assessing the performance of current systems, and advising on best practices and outcomes the customer should consider implementing, including economic impacts.



## Implementation Management

As the engagement progresses, design and product experts can create an experience that is the right one for all users. In conversational design, experts can type the way people talk, creating dialogs. Implementation and configuration experts can customize Mosaic and ensure all legacy systems connect properly to our cloud-based technology to run as expected. All of this is orchestrated using Agile methodologies, which delivers a quick initial deployment with incremental improvements along the way.



## Performance Management

Once live, Success Coaches can assess performance based on data and KPIs and recommend changes that can be quickly implemented. Typically occurring monthly, these experts can report on the current state and recommend meaningful changes to continually improve the implementation.



### DID YOU KNOW?

Intrado supports pay-for-performance client engagements. To ensure delivery of agreed business outcomes, pricing can be aligned to actual outcomes.

## Build Once, Deploy Everywhere

Mosaic provides the capability to activate customer interaction channels quickly.

A self-service application deployed in the voice channel can quickly be configured and enabled in the SMS channel. As any new channels are used, the personalized experience continues, providing the same customer experience regardless of channel.

Additionally, by expanding channels using Mosaic, the number of call center technologies involved in the various handoffs are reduced, further reducing complexity, costs, and improving efficiency.

This capability adds clear value to transactions such as voice of the customer surveys which can be handled in the voice, SMS or other digital channels.



### DID YOU KNOW?

Through our relationship with a leading entertainment provider, we allowed customers to buy pay-per-view using text messaging. Revenues improved, and household spend for those using the service increased as well. This effort generated over \$54M of new revenue per year.



# Mosaic Capabilities and how we Deliver: Features, Benefits, and Business Outcomes

The Mosaic Digital Conversation Platform delivers a complete solution that includes additional foundational technology required for Virtual Assistant Orchestration.



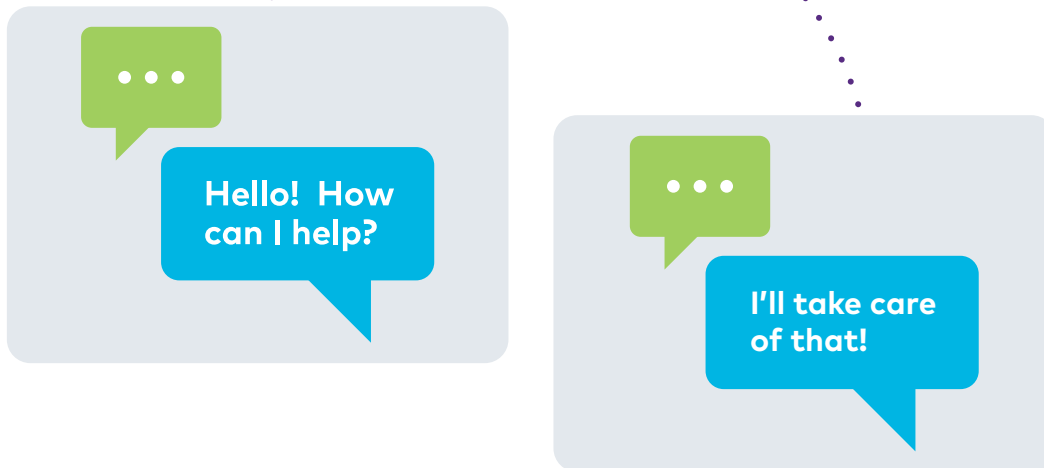
# Intelligent Virtual Assistant

Mosaic delivers conversational automated Intelligent Virtual Assistants to answer common questions, perform transactions, and get customers the help they need accurately, quickly, and efficiently.

Conversational AI-powered virtual agents engage customers with personal, conversational speech in real-time: "Hello! How can I help?"

Mosaic caches both conversation and intent within the conversation, allowing other modules to leverage this information in resolving standard issues right away: "Let me take care of that."

When needed, human agents are engaged: "I'll transfer you to a specialist."



## BENEFITS

- ✓ CE&L (Customer Experience and Loyalty)
- ✓ CR (Cost Reduction)
- ✓ RG (Revenue Generation)
- ✓ BODE (Build Once, Deploy Everywhere)

# All Channel Enablement

Mosaic provides enablement across voice and digital channels. Meeting customers where they are at any time, reducing frustration, and improving their experience.

**This is enabled by several technologies:**



## Mosaic Voice Gateway

The Mosaic Voice Gateway enables your customer phone calls to connect with Mosaic seamlessly and safely. It is a scalable, reliable, standards-based voice gateway.



## Mosaic Digital Gateway

The Mosaic Digital Gateway provides access to digital channels, including native support for 2-way communications via SMS.



## Persona Enablement

Record, edit, and implement high-quality, professionally recorded audio or text-to-speech to deliver a persona that aligns to your brand.



## BENEFITS

- ✓ CE&L (Customer Experience and Loyalty)
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- ✓ STV (Speed to Value)
- ✓ BODE (Build Once, Deploy Everywhere)

# Personalization

With Mosaic's foundational functionality powering the customer experience—once we quickly know who is calling or texting—personalization can begin immediately.

Once the customer is identified, using Machine Learning, Mosaic can quickly predict why the customer is reaching out, providing faster resolution by the virtual assistant.

Personalization of the brand, or how the organization wants the customer to identify them, starts from the beginning, so messaging is consistent regardless of channel.

All of this happens in a fraction of a second behind the scenes with predictive intent engines. Learning over time, these engines detect customer patterns to predict why the customer is contacting your organization. This can include things such as the language they are speaking, the type of account they have, common reasons why the customer calls, and relevant events in your relationship with them.



## Data to Enhance Predictability

To continuously improve predictive intent, we leverage partnerships to enhance existing data in an organizations' CRM. This can ensure, for example, that the customer's address and phone number is current, or the mobile phone you are texting is still owned by the intended recipient. With near real-time machine learning, it only takes minutes to update customer data needed for predictive intent. This makes the next call more relevant—in recent tests, predictive intent accuracy went from 45% to 70%.



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- ✓ ETGBO (Experience That Guarantees Business Outcomes)



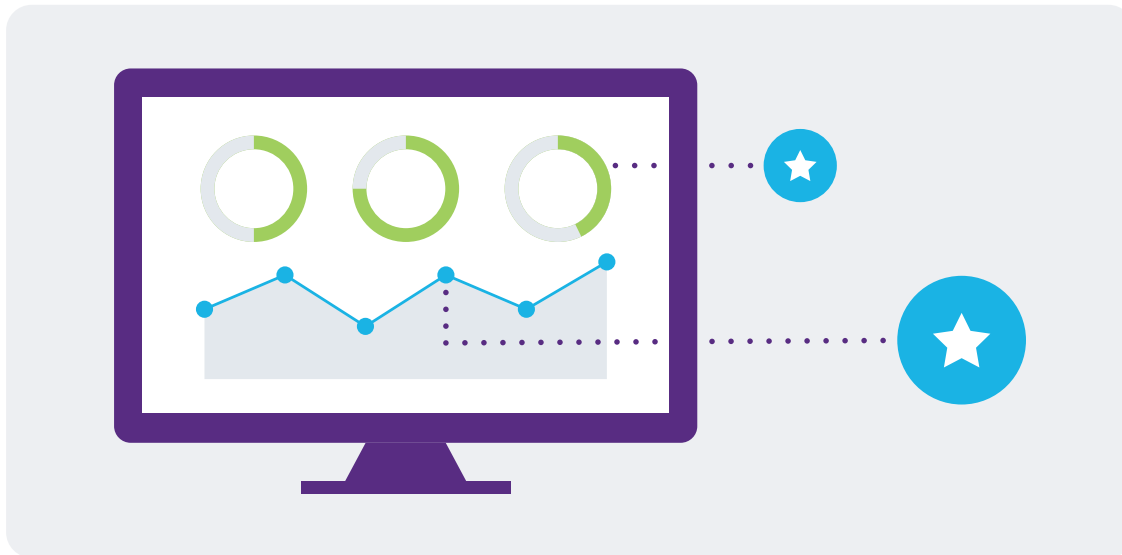
# Reporting & Analytics

Mosaic provides you the power to monitor platform level metrics, perform analysis of application performance, and uncover areas of opportunity.

This helps organizations to better understand what customers are contacting them about, and if there are opportunities for improvement—such as to open more channels or introduce new self-service enhancements.

The ability to self-serve, build reports to suit an organizations' specific needs—such as segmenting calls—will enable you to spot trends so levers can be pulled to add value.

Additionally, our CX Success Coaches will use analytics to make ongoing recommendations as a part of our continuous improvement cadence.



## BENEFITS

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Monitor platform level metrics, perform analysis of application performance, and uncover areas of opportunity.

## Contact Center Integration

Mosaic supports contact center integration with contact center providers to allow for a clean transition from our virtual agent to the best fit contact center agent (when needed).

Relevant foundational information is passed along with the white glove hand-off customers deserve—including who the customer is, why they called, intent, and relevant account & transactional information. This allows routing to send the customer to the right agent.

Although Intrado can integrate with any contact center software, we have strategic partnerships with leading Cloud providers for optimal integration. Next generation cloud contact center platforms enable your business to operate more effectively, so you can sell more and service better.



A blue rectangular box containing a bar chart icon with an upward arrow and the word 'BENEFITS' written vertically. To the right of a vertical line are three bullet points, each with a checkmark icon.

- ✓ CE&L (Customer Experience and Loyalty)
- ✓ CR (Cost Reduction)
- ✓ ETGBO (Experience That Guarantees Business Outcomes)

## Outbound Messaging

Mosaic enables channel of choice management for customers, allowing them to tailor what messages they receive on which channels, like voice or text.

Messaging is automated and proactive. AI and ML capabilities trigger the best next action proactively, leading to the messaging. For example: A customer is due for a prescription refill. The likelihood of a customer refilling based on an automated reminder text improves dramatically.

To continuously improve communication with customers, Mosaic will determine if customers respond more quickly to a text than to a phone call and move towards leveraging that channel going forward.



A blue rectangular box containing a bar chart icon with an upward arrow and the word 'BENEFITS' written vertically. To the right of a vertical line are four bullet points, each with a checkmark icon.

- ✓ CE&L (Customer Experience and Loyalty)
- ✓ CR (Cost Reduction)
- ✓ RG (Revenue Generation)
- ✓ BODE (Build Once, Deploy Everywhere)

# Collaborative & Consultative Enablement Services

We deliver a market leading customer experience with a unique focus on continual improvement and lifecycle management to drive next best actions. With 30 years of longevity, focus, and breadth across industries, Intrado can leapfrog steps in a deployment and partner with you long after deployment for continued success.



Rapid onboarding and activation supporting initial speed to value.



Unique focus on business outcomes backed by continual improvement.



Ongoing success management with monthly recommendations and program enhancements.



Strong vertical expertise in financial, insurance, healthcare, pharmacy, travel & hospitality, retail, communications, education, entertainment, utilities, and telecommunications.



Mosaic virtual assistant evaluation & consulting, application development and ongoing lifecycle management services.



## BENEFITS

- ✓ CE&L (Customer Experience and Loyalty)
- ✓ CR (Cost Reduction)
- ✓ RG (Revenue Generation)
- ✓ STV (Speed to Value)
- ✓ BODE (Build Once, Deploy Everywhere)

# Security & Compliance

Mosaic is fully secure and compliant with several information security regulations, including:



Financial / Credit Card Industry



Telecom Regulations



Healthcare (HIPAA) and Personal Data



Information Security



Outbound Calling & Texting (TCPA)

We have unique solutions to safeguard both the infrastructure you rely on for automation, as well as the interactions managed by your contact center employees and outsourcers.



## BENEFITS



CR (Cost Reduction)



ETGBO (Experience That Guarantees Business Outcomes)

Intrado maintains these compliance guardrails so an organization can run its business.

# Secure Agent Payments

Intrado partners with leading security enablers to reduce fraud and compliance risk for contact center operations from PCI (Payment Card Industry) where payment transactions and other sensitive personal information is being handled.

Your agents remain in touch with their customers while payments are being made via the contact center, however, when customers enter their payment information, agents do not hear any sensitive information or see the information on their screen.

After the payment information is entered, the agent will be contacted via a token, so they stay on the transaction all the way through, with no call transfers, and the payment is completed without sensitive data being exposed to the agent.

Mosaic leverages brand personalization to consistently manage the messaging, so customers are comfortable through the transaction.



## BENEFITS

- ✓ CE&L (Customer Experience and Loyalty)
- ✓ CR (Cost Reduction)
- ✓ R&FM (Risk and Fraud Mitigation)



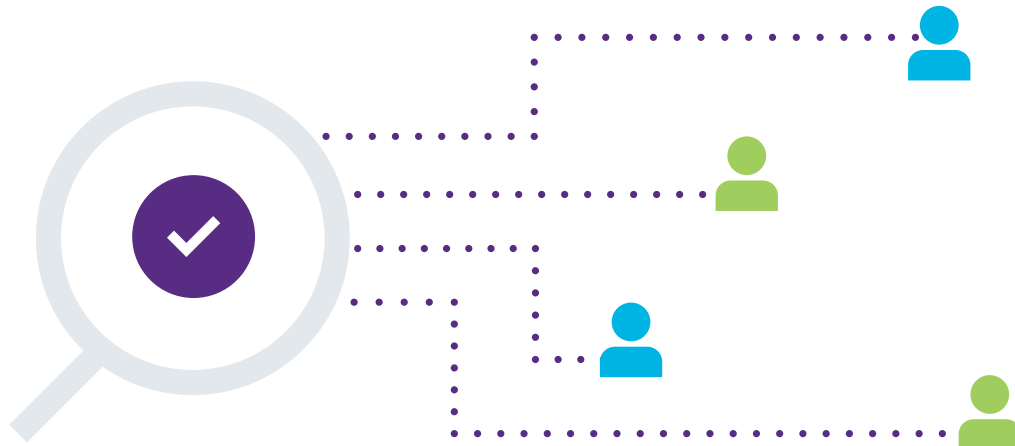
# Advanced Customer Identification

Mosaic has the unique ability to automatically match inbound customers and prospects using their phone number with client-specific information, such as account number, from a matched record in a client's customer database.

Mosaic can identify and contain more customers by linking phone numbers to a customer record **even when the inbound phone number isn't in the CRM.**

Advanced identification saves customer frustration, as typically when a phone number is not located, the call is transferred to an agent. Additionally, Mosaic offers a secure service with the only input being a phone number and the return being already identified information.

This service improves customer self-service opportunities and cost savings from reduced agent need to solve common customer inquiries.



## BENEFITS

- ✓ CE&L (Customer Experience and Loyalty)
- ✓ CR (Cost Reduction)
- ✓ RG (Revenue Generation)
- ✓ STV (Speed to Value)

Mosaic can identify and contain more customers by linking phone numbers to a customer record.

# Smart, Predictive Outreach

We know the best time to contact your customers. With phone call answer rates averaging 25-30%, intelligent predictive outreach can increase contact rates by 30% or more.



This is because Intrado has access to information as to when a customer is active on their phone and can advise the best time window to reach out to that customer, enabling business outcomes.



## BENEFITS

- ✓ CE&L (Customer Experience and Loyalty)
- ✓ RG (Revenue Generation)
- ✓ CR (Cost Reduction)
- ✓ STV (Speed to Value)

# Voice of the Customer Insights

With traditional VOC surveys, businesses will typically ask customers things they believe are most important to the business. Mosaic voice of the customer insights allows customers to share what is important to them as a customer.

**Your customers can provide open-ended responses which are transcribed in real-time, which provide for three key benefits:**

- 1 Our AI-driven application can immediately uncover themes and dynamically choose to ask follow-up questions when appropriate to gather further details behind customer sentiment.
- 2 Open-ended, automatic transcription is fed directly into our analytics platform, uncovering deeper insights into customer experience themes and opportunities.
- 3 Lower costs with greater speed to value, as compared to sending audio files to a human-transcription service.

Actionable insights are delivered immediately, as opposed to days and weeks.

Learn how you can better serve and improve your relationship with your customers. What likes, dislikes, and improvements might your customers be sharing with others?



## BENEFITS

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Mosaic voice of the customer insights allows customers to share what is important to them as a customer.



# Human Insights Usability Testing

Human Insights testing quickly and cost effectively delivers feedback on your application design, brand impression, and customer experience using crowdsourced users to test the designs and customer journeys.

This improved user testing builds a profile based on the testing results, which provides valuable information on how to adjust things like your website, for example, if a tester has critical feedback.



Provides feedback on your customer experience, applications, and brand in hours—80% completion within 2 hours.



Quick and cost-effective focus groups, including both agent and customer perspectives.



Ability to recruit your ideal testers, customers and potential customers based on over 1M participants.



## BENEFITS

- ✓ CE&L (Customer Experience and Loyalty)
- ✓ RG (Revenue Generation)
- ✓ CR (Cost Reduction)

## Cloud Contact Center

Intrado partners with leading cloud contact center providers for optimal call center integration. Although Mosaic will integrate with any contact center, some customers may not have an optimized contact center platform in place—down to the actual phones.

Intrado can introduce great options for your next generation cloud contact center, enabling your agents to be more effective, so they can sell more and service better.

This brings the tools and platform for everything downstream of Mosaic, with a best-in-class partner who can leverage the Mosaic IVA.



### BENEFITS

- ✓ CE&L (Customer Experience and Loyalty)
- ✓ RG (Revenue Generation)
- ✓ CR (Cost Reduction)

## Orchestration Tools

Our vision for development orchestration is that clients will build their own applications using the Mosaic framework. These tools will eventually allow your developers to create new automated customer interaction flows, where pre-configured functions will enable increased self-service.



# Designing the Experience

Intrado designs with a consumer centric focus. It is an organic, careful approach that leverages interviews, usability expertise, and best practices. There has been a long history leveraging technology to assist in design and execution.

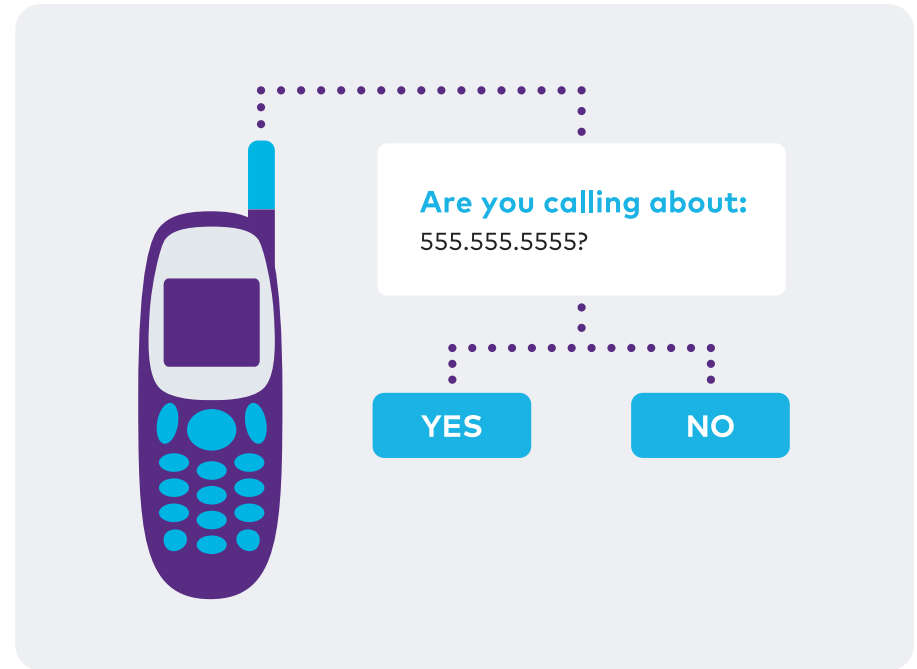


# History of CX Design



## Phone Tree and Touch Tones

Beginning in the late 1970s, a “verbally interactive telephone interrogation system with a selectable variable decision tree” enabled companies like movie theaters and the Zoo to use phone menus to give out directions, list movie times, and to act as a switchboard.

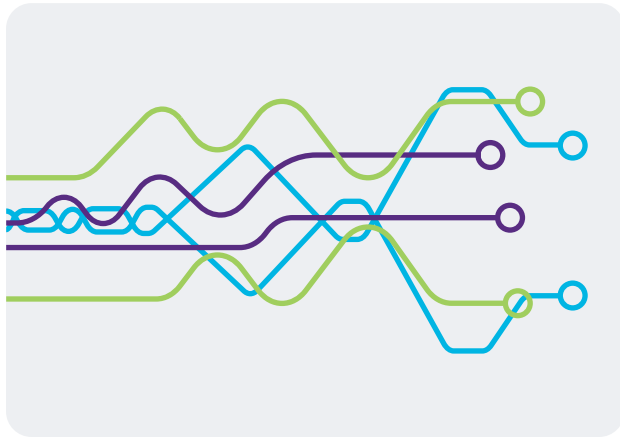


## Directed Dialogue Speech

Directed dialog is an IVR format with a tree-like structure. Callers answer yes/no questions or speak anticipated responses to specific questions to move the interaction forward. Directed dialog has been around for years and is still commonly used in IVRs.

# Modern Conversational Design

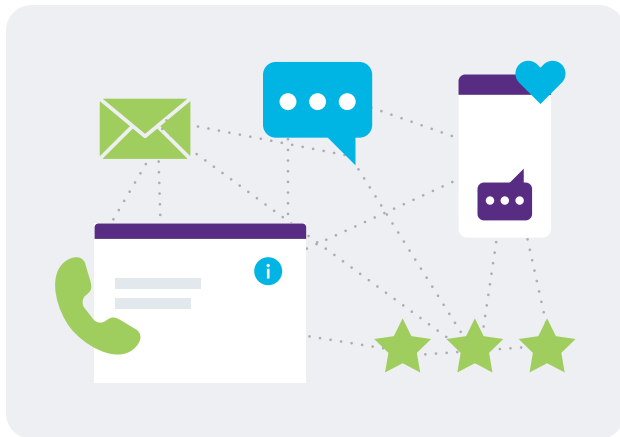
Computers are mimicking human cognition and intelligence to greater extents, and even though artificial intelligence and machine learning continue to evolve, they are extensively used to enhance customer experience today.



## Natural Language Understanding, Artificial Intelligence and Machine Learning

NLU, AI and ML are producing big improvements in quality and responsiveness by automating many manual tasks. Mosaic leverages these technologies where they can be most useful right now: enhancing, not replacing, the human face of the contact center.

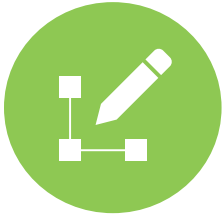
Our solutions can quickly answer questions, perform transactions, and route customers to the most knowledgeable, capable people to resolve customer issues while providing enhanced insight to customer service agents, shortening the time it takes to resolve issues.



## All Channel Design

Customer experience that reaches across all the channels through which a customer interacts with a brand, including voice, SMS, mobile apps, websites, email, and social is key to an effortless, consistent, and positive transaction through all channels, or omnichannel.

# Executing the Design



## Self-Managed Applications

Allows customers to leverage the Mosaic platform APIs at their discretion to deploy their applications, send & receive calls and text messages, and manage the day-to-day activities; ensuring updates are implemented and channel improvements are configured.



## Hybrid

Driven by Success Coaches, the hybrid execution model takes on a more consultative, business-like approach where coaches sit with the customer, continuously advising on the best design, functionality, and services for customer-developed applications.



## Platform Updates

Updates are configured, delivered quickly, and with high quality. Think "configure" vs. "develop". These include leveraging pre-built customer interaction modules, dialog scripting updates, broadcast messaging changes, and functionality that is adaptive to the way customers interact with your business.



## Channel Expansion

Leveraging our build once, deploy everywhere value proposition, Mosaic provides channel enablement across voice and digital channels—based on the customer's preferred channel.

To provide maximum reach beyond the telephony experience, Mosaic's omnichannel capability can be quickly leveraged to deploy messaging on voice and SMS today, with MMS, social, messenger apps, and next gen services in the future (RCS, vSMS).

# Executing the Design Continued



## Lifecycle Managed

Fully hands on, implemented, and consultative, Intrado ensures that your applications are maintained and updated with current controls and functionality. With Intrado's experts managing the IVA, our customers' business can focus on its core competencies, while Intrado manages and continually improves the virtual assistant capabilities.

### Intrado's standard Lifecycle Management package includes:

- Designated Success Coach
- Application performance reviews
- Quarterly business reviews
- Consultation on application performance improvements
- Business as usual, non-project-related intake requests
- Subject matter expertise with regards to application operation, reporting and analytics

- **Continuous Improvement:** Utilizing a collaborative and consultative approach, Intrado delivers a market-leading customer experience with a unique focus on continual improvement to drive next best actions. To help ensure client continuous improvement, Success Coaches will play a key delivery role.

Success Coaches are responsible for the execution of a variety of client engagement functions to improve client capabilities and to support successful fulfillment of client business goals. Additionally, they investigate any client issues that could negatively impact success, and coordinate remediation plans with internal stakeholders, while ensuring adherence to established policies and procedures.

- **Analytics:** Intrado designers are trained in conversational design practices and user testing processes to create the most ideal CX design for clients. Intrado Data Science powers our ability to monitor platforms, perform modifications based on outcomes, and continually optimize.

## About Intrado CX & Mosaic

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Intrado CX/Mosaic is an intelligent consumer-driven conversational platform using our AI powered Virtual Assistant (IVA). This creates a natural self-service experience that delivers proven outcomes through unique integrations and robust business orchestration to support CPaaS (manage on our own) or with our experts.

Mosaic Digital Conversation Platform supports customers where they are, to efficiently manage costs and deliver satisfying customer experiences by leveraging artificial intelligence (AI) to deliver outcomes that are easy to implement, change and measure.

Learn more at [www.intrado.com/customer-experience](http://www.intrado.com/customer-experience)

