



# Performance Platform Capabilities



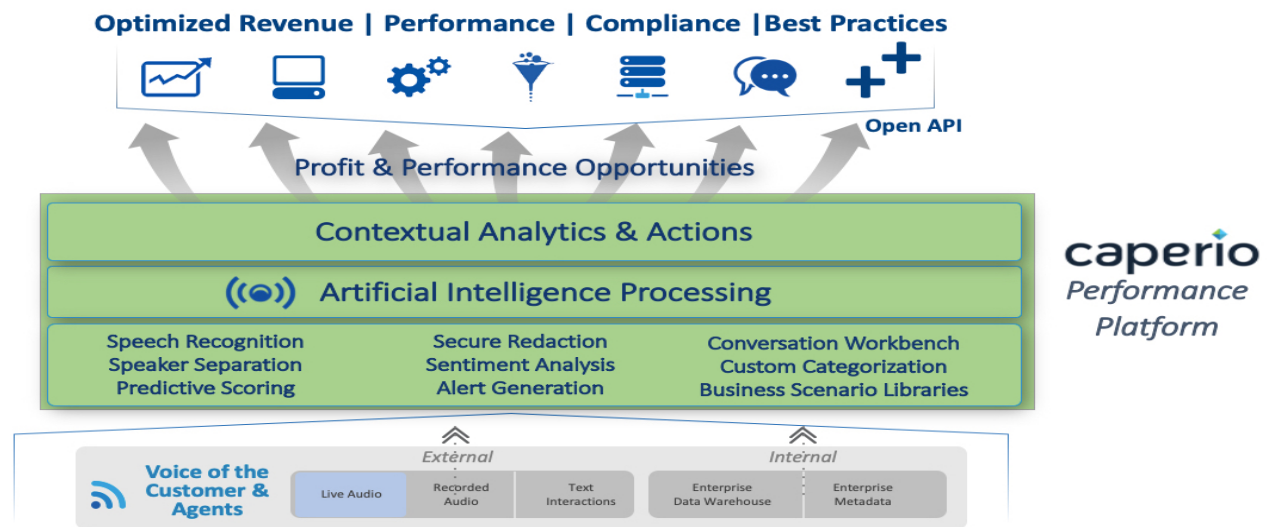
July 2020

[www.caperio.ai](http://www.caperio.ai)



by

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The Caperio performance platform is designed for business-level execution leveraging artificial intelligence to bring together actionable context, omni-channel consolidation, and comprehensive security.

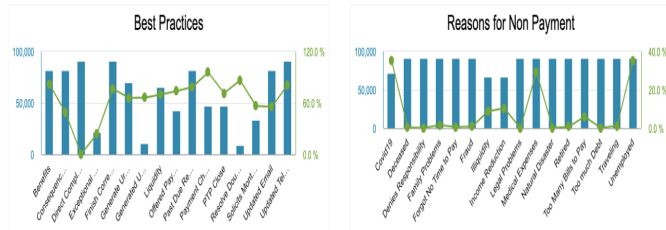
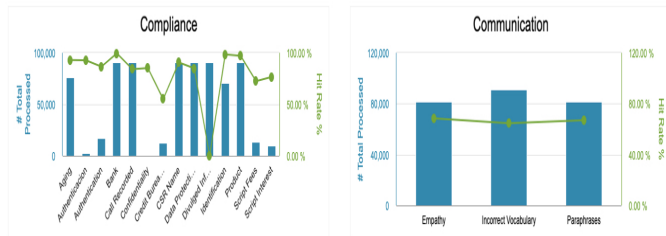
Companies use Caperio to proactively create revenue, business performance and results. They leverage key platform capabilities to establish a common foundation across multiple lines of business (marketing, sales, service, collections, etc) using and optimizing inside proven libraries to achieve and maintain top line outcomes while reducing ongoing costs.

Unlike purely technical deployments, the Caperio platform goes further than capturing speech/text and providing searching with fundamental analytics. Other offerings technical approaches provide no ability or accountability for contextual best practices that actually reveal opportunities for closed loop actions and granular, specific performance improvements. The Caperio platform creates fastest time to value and also ongoing improvement through these core areas:

1. **Proven Business Scenario Libraries**
2. **Workbench for Rapid Customization**
3. **Remote Performance Optimization**
4. **Total Security & Open API Architecture**

## Platform Components

1. **Caperio Performance Engine**-Core Artificial Intelligence processing and staging for all streams across voice, text, chat, and support.
2. **Caperio Optimized Performance Libraries**-Proven lexicon of all phrases, expressions, behaviors, skills, compliance & best practices based on aggregate interaction experiences. These include:
  - a. Customer Revenue & Payments
  - b. Sales & Business Development
  - c. Compliance & Regulatory
  - d. Quality & Best Practices
  - e. Customer Support & Services
  - f. Cross-Selling & Upselling
  - g. Behavior & Customer Experience
  - h. Partner & Channel Support
  - i. TeleHealth & Telepresence
  - j. Customer Retention & Fading Loyalty
3. **Caperio Conversation Explorer**-Discover areas of opportunity and challenges across each interaction down to specific words and phrases.
4. **Caperio Visualize**-Role-based insights, deep analytics & emerging trends to unlock revenue & improve best practices.
5. **Caperio Workbench**-Open tool to rapidly expand, edit, and optimize capture elements of each interaction.
6. **Caperio Performance Scoreboard**-Provides up to the moment scoring of each team and member's performance & trending.
7. **Caperio Omnichannel Unifier**
8. **Caperio Integrate**-Open API to share context and results across other popular Enterprise applications.



Top 5 Reasons for non Payment



***"Caperio represents a quantum leap in optimizing customer interactions across channels both speech and text, going beyond mechanics and revealing what is actually working right now to increase dollars to the top line while proactively ending compliance and behavioral issues."***

## Why People Are Moving to Caperio Performance Platform

While several companies offer 'speech analytics' today, only after deployment do they discover an 'empty box', devoid of actionable best practices, proven to work best practice, established compliance and regulatory tracking, and specific contextual words and phrases, creating the need to spend months defining and testing before the technology is useful for anything more than capturing interactions.

The result is these systems do not generate cash flow and quickly become costly recording systems as missing key line of business analytics and a framework for actual performance must be agreed and manually developed over time.

Caperio is built for performance results for the business from the start, with focus on **what really works** to drive new revenues and eliminate bad practices, leveraging the depth of business scenario libraries and the aggregated best practices they represent.

Just as important, companies can immediately shape and optimize their own customizations using the Caperio Workbench as well as Caperio Conversation Explorer, adapting in minutes and deploying changes seamlessly to take advantage of newly discovered actions and wording seen in the increase across interactions.

The net effect is fastest Time to Value with less friction matched with the ability to proactively drive cash flows across lines of business.

## Consolidate For Better Execution

Most all call centers today are using a mix of legacy software to capture different streams of voice and text, and have outdated reporting and analytic systems, usually managed by Information Technology Departments, with an ongoing long list of requests for changes, integrations and updates. These represent both needless costs and potential exposure in the time between issues are identified and requests are answered.

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7 matches in Test_Transcripts\20200608-123525a7e955a.flac.1000-transcript.txt
17 [00:03:21] spk_f: If you pay at least that amount, you can continue using the card. You can pay at a Seven-Eleven or an ATM. You can make an online payment, or you can make
45 [00:09:23] spk_f: Also, I'd like to let you know that the bank allows you to make your payment online or bank transfer directly from your checking account, or credit or debit
1 match in Test_Transcripts\20200608-123525a7e955a.flac.1000-transcript.txt
17 [00:07:32] spk_f: To facilitate your payment the bank is able to accept a transfer from your checking account or you can use a debit or credit card for payment. Also sir, it
5 matches in Test_Transcripts\20200608-124816ba9e0ef.flac.1000-transcript.txt
23 [00:05:09] spk_f: you can choose from online payment, ATM, or make a deposit at any bank branch. If you have a debit or credit card then you can use them to make a payment. /
4 matches in Test_Transcripts\20200608-125122f0c29901.flac.1000-transcript.txt
17 [00:01:00] spk_f: Okay. I'd like to remind you that we offer online payments, or bank transfer from your checking account, or you can use a credit card. Also, you can pay at
8 matches in Test_Transcripts\20200608-125430d473631.flac.1000-transcript.txt
45 [00:08:14] spk_f: not only can you pay at any online window, but also at any ATM, ACH Payment, or online. Finally, you can also choose to use a credit or debit card for pay
4 matches in Test_Transcripts\20200608-129256f7e0d0.flac.1000-transcript.txt
17 [00:03:27] spk_f: The bank makes paying your account very convenient. Choose from payment online where you can transfer from your checking account, or use a debit or credit
6 matches in Test_Transcripts\20200608-130831a1a138a.flac.1000-transcript.txt
45 [00:08:38] spk_f: from the choices I mentioned which payment method will you be using to make the payment? bank transfer from another account with the bank.
45 [00:08:54] spk_f: Perfect. If you prefer internet banking is an option, or with your smartphone banking app. I will remind you that your personal information is protected by
45 [00:08:08] spk_f: To realize your payment the bank offers for your convenience online payment capability. Alternatively, you may choose a bank transfer from your checking ac
8 matches in Test_Transcripts\20200608-131524d4c1781.flac.1000-transcript.txt
17 [00:01:18] spk_f: for what you tell me about the statements. If you're not getting it, miss. You can request a statement online or from any branch. I give you the customer se
23 [00:03:04] spk_f: also we can transfer the funds from your checking account debit card, from any bank, or you can pay in a branch, bank or Seven-Eleven. Where will you be m
4 matches in Test_Transcripts\20200608-13794e1e10478.flac.1000-transcript.txt
23 [00:18:57] spk_f: I am going to try and pay at a branch. Otherwise, I'll make an online payment tomorrow.
23 [00:18:25] spk_f: Certainly sir. I understand. We'll be counting on your payment at a branch today. Remember you can also pay at Seven-Eleven or ATM.
5 matches in Test_Transcripts\20200608-134117f3059551.flac.1000-transcript.txt
17 [00:01:51] spk_f: Okay. Payment options are online payment, if you have a credit card, or bank transfer from your checking account or directly in a branch. It's important to
45 [00:12:47] spk_f: directly at ATM. Perfect. Your information is protected by law. This call is being recorded for quality purposes. Please confirm your phone number for me

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100% Automated Coverage-Ideal for Remote Agent Management

The opportunity to reduce the complexity of multiple applications and systems as well as the need for external requests for updates are eliminated with the Caperio performance platform. The ability to consolidate all interactions, both speech and text, as well as the non-technical execution empowered with the tools provided to call center leaders to take control and immediately change, edit, deploy and track for their teams translates into the ability to drive strategy and simplify operations.

## What are Business Scenario Libraries?

Call centers represent the forward-most touchpoint of the organization. Agents are first to identify issues and opportunities, and the performance in each interaction determines whether margins and profits are created and increased, or if bad actions and lack of adherence to proven scripts and compliance costs the company millions.

Usually, there are significant differences in the performance from individual agents, but without having 100% of interactions and proactive understanding of performance, quality monitoring is almost always reactive and dealing with the most serious issues, and not optimizing revenue and how to up level mid-level agents to top agent performance levels.

The goal of business scenario libraries is to provide organizations with 80% or better of the words, phrases, and expressions proven to impact performance and identify issues across all interactions.

Not having these libraries often results in months of trial and error leading to paralysis, as software without contextual best practices focused on specific results proven to work must be generated, tested, and debated.

For instance, for collection agents, having a

set of defined phrases proven to drive outcomes of greater promise to pay can make the difference between little difference before implementation and a step change of over 220% by leveraging and shaping a delivered foundation inside a Caperio Business Scenario Library. (See Case Study).

Companies on average realize 70% faster Time to Value deploying Caperio than generic speech analytics software packages. BossaNova delivers ongoing library updates and accountability for sharing best practices. To learn more, visit our [Caperio.ai](https://caperio.ai) website and request access to our demo area.

## Caperio Workbench for Rapid Customization

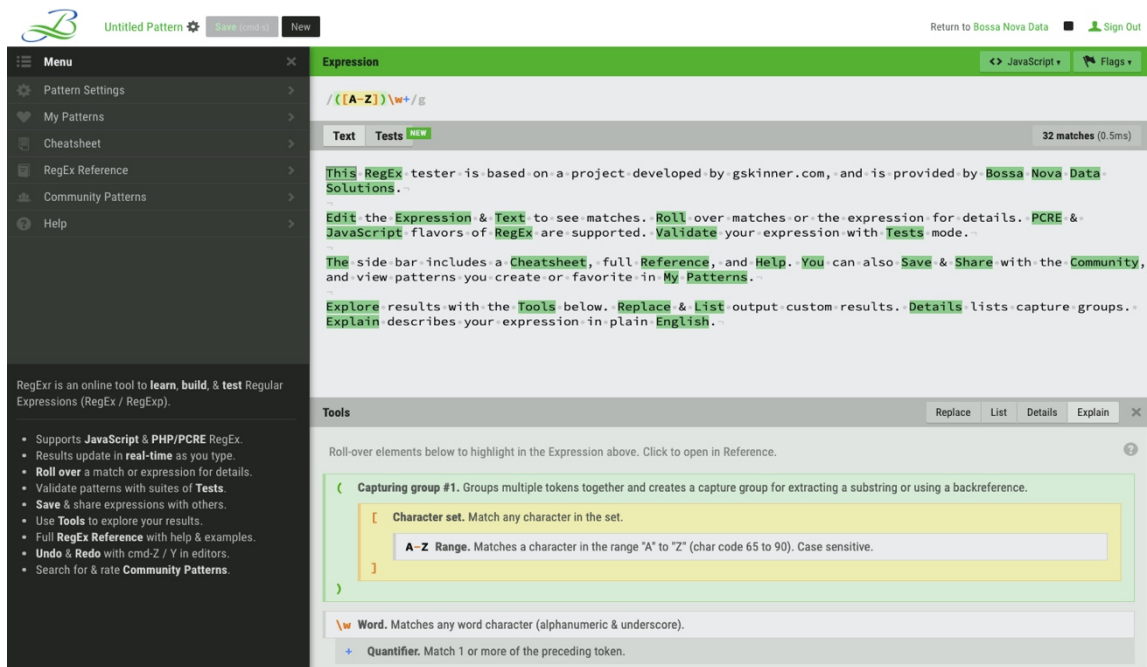
The ability to adapt to change in a call center is the #1 element in measuring success and contribution to business growth. Caperio Workbench and Caperio Conversation Explorer represents the easiest and most direct way to instantly change how the AI-based platform identifies key words, phrases, and expressions at the most granular level, without the need for writing development code or invoking technical help.

Call Center Analysts and Managers have the tools they require to deploy changes and see results all in the same online experience, making it possible to manage teams and take advantage of discoveries and test new approaches, iterating at the speed of the interactions, and not the speed of IT support.

***“The ability to manage the platform ourselves is the best thing about Caperio. Changing & introducing new word searches and regular expressions instantly allow us to maximize our results in a very fast manner.”***

***-Speech Analyst Director, Sertec***





## Caperio Workbench

To see how call centers are seeing exponential results by having complete control, visit the Caperio.ai website and request access to our demo area.

## Remote Agent Performance Optimization

According to the National Association of Call Centers, more than half of the contact centers in the United States today (53 percent) have some percentage of their agent population functioning from a home office.

The benefits of using remote agents make a compelling case for companies who are looking to streamline operations, provide improved customer service, decrease call center costs, and increase agent retention and job satisfaction. Companies experience bottom line savings through reduced call center operating costs. Reduced operating costs associated with at-home agents include lower starting wages and reduced benefits, less need for brick and mortar facilities and support staff, increased labor pool with flexible scheduling options, and reduced training costs associated with increased agent retention. Additional cost savings are found with part-time agents who receive reduced benefit packages required for full-time employees. The at-home agent model reduces the need for large call centers and accompanying support staff. The agent pool is limitless with remote agents, and

various configurations of scheduling options are possible. Staffing for special events, holidays, and vacations is simplified, also accommodating spikes in call volume on short notice. Employee satisfaction leads to agent retention. Replacing agents is a major cost consideration for companies with high employee turnover. Recruiting and training costs can significantly impact a company's bottom line profit margin.

**Retention rate for at-home agents is 80% versus 25% for in-house.**

Agent morale is a key factor in retention. Remote agents are more likely to be satisfied with their jobs because of being empowered by having control over their schedules.

***Estimated annual savings per at-home agent is approximately \$25,000, including reduced facility requirements, training, and supervisory demands. Experts report the on average cost of an on-site agent at \$31 per hour, compared to \$21 for at-home agents.***

The key to remote agent success is making certain they each have up-to-the-minute understanding of their performance and any issues that can impact success or expose the company. Caperio performance platform is designed in the cloud for seamless execution by remote agents and is used today by the largest companies to achieve excellence across remote agents working in their organizations.

# Caperio Data Security & Management

## Track Record Matters:

**ZERO** information security or data protection incidents  
over the last 14 years



SOC 1 Type II



SOC 2



GDPR



With sensitive information shared in each interaction across speech and text channels, security and management of all data is at the heart of the Caperio performance platform. BossaNova is committed to protecting customer data with zero data protection or information security incidents in our entire history. We are required to adhere to the highest requirements in the AWS cloud, including certification with SOC2 Type II, our platform is also GDPR compliant. We follow the standards and best practices established by international security frameworks such as ISO 27001/27002, NIST, HIPAA, Cloud Security Alliance (CSA), PCI-DSS as well as Section 508 compliance.

**All data is encrypted in our platform, and matched with the highest level of identity and access controls, including two-factor authentication for all users.**

Caperio PCI offers customers a secure way to process sensitive credit card data and automatically redact all PII (personally identifiable and credit card information). These standards are those required by the US military and intelligence communities and can be reviewed in detail at these links.

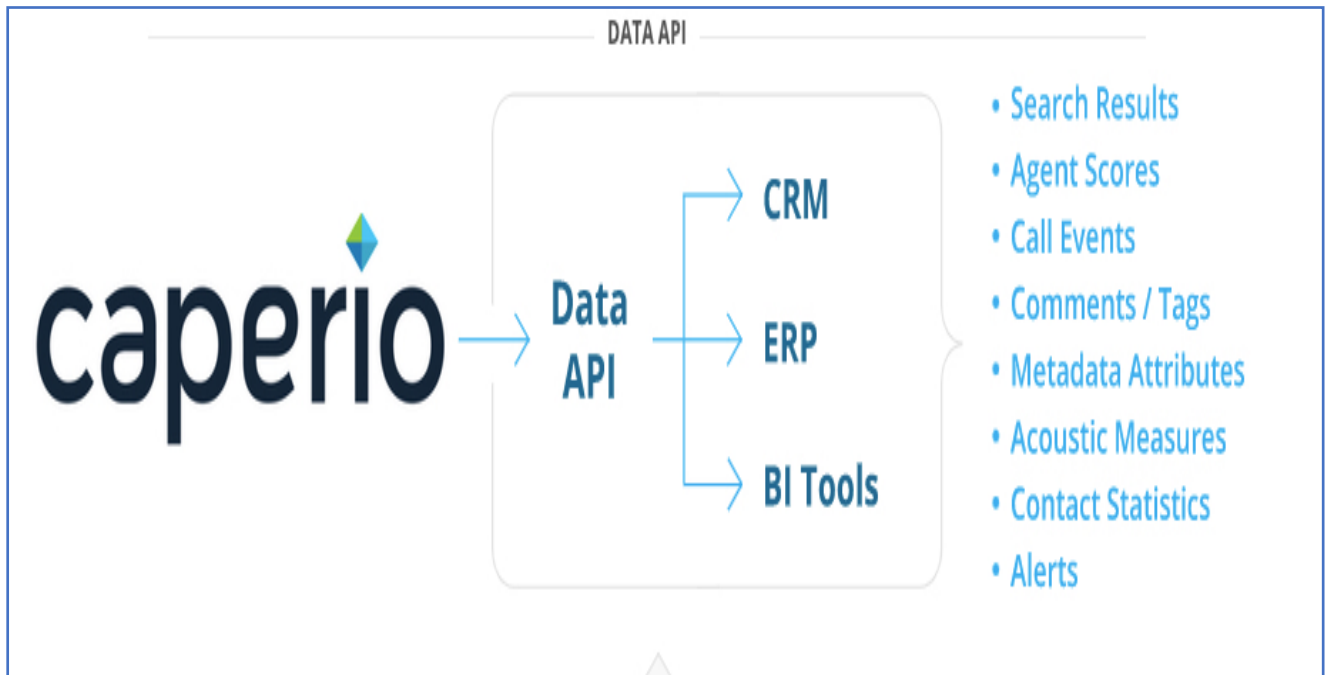
<https://aws.amazon.com/compliance/data-privacy-faq/>.

<https://aws.amazon.com/security/?nc=sn&loc=0>

### DATA TRANSFER POLICIES

All file transmissions are encrypted via https, tls (ftps), or VPN. Our clients define their preferred method for data protection in transit and we adapt accordingly. In addition, all data is stored in encrypted form as well.

IP address restrictions blacklist everyone and white list only specified IP addresses at the server level via TLS software. Clients access our server only via TLS with user specific id and password matched with two-factor authentication, we can also federated with existing single-sign-on policies. All access is logged and available.



(Continued)

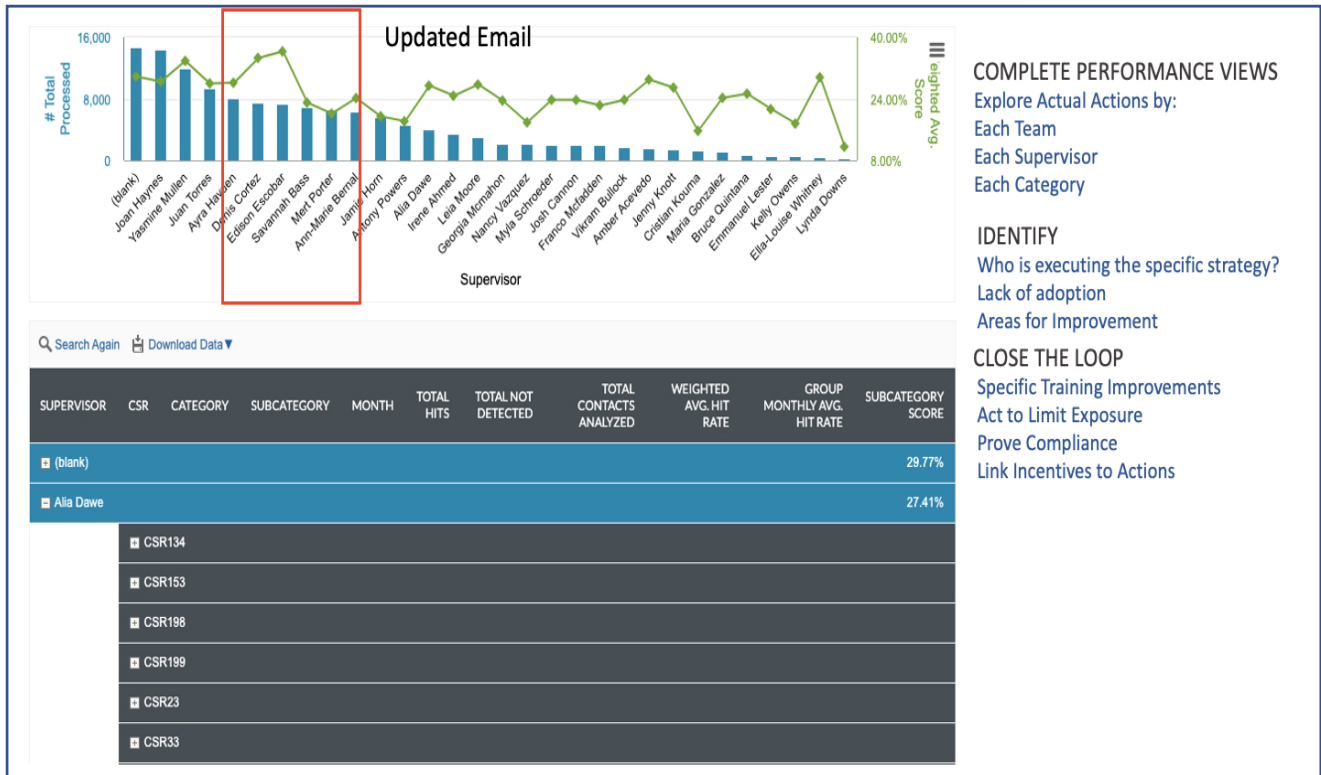
### PROCESSING & AI PLATFORM EXECUTION

We adhere to AWS security standards for artificial intelligence operations. All containers and objects are atomized & private with authorized users can access containers and access objects. Additionally, all authorized access to these objects must first have confirmed authorized ip address match. Any authorized users attempting to access an object stored in S3 from anywhere other than the approved domain will be denied access.

All data at rest is encrypted. Access to data is controlled via authorization tables (validated user id's and passwords). Access logs are provided. Additionally, companies can choose to restrict access for authorized users to their own IP address set (so authorized users can only access the web application from an approved work location). We also have comprehensive High Availability and Disaster Recovery policies to backup and restore all data processed using the Caperio platform with a SLA of 99.995% uptime overall.

### ENTERPRISE API FOR OPEN INTEGRATION

Companies who experience consistent growth using the Caperio performance platform often seek to extend the insights and actual customer expressions and best practices. Our secure API enables insight from 100% of customer interactions to be integrated at scale with corporate metadata and existing systems, such as CRM,HRM,Marketing and Support applications. Standards-based programming resources make it easy to securely capture and integrate customer dialog, sentiment and agent performance along with chats, email and other data for mining and analysis. Agile customization for data acquisition, enrichment and presentation is facilitated across a stands-based foundation. To learn more, learn more about integration scenarios and securely flowing data across the Enterprise, visit our website.



Core Features	
Reports, Graphs, and Dashboards to monitor key indicators and performance trends	👍
Customer Representative Scorecards at individual, supervisor, and manager level	👍
Fully customizable Contact level Search & Report capabilities with supporting documentation of original contact and key NLP findings.	👍
Role-based security, Create different roles and groups to control application access and permissions.	👍
IP-based access control- Restrict or grant access to apps based on IP addresses.	👍
Private URL's that are accessible only to authorized users accessing from authorized IP address only when accessed from our web application	👍
Fully Customizable Web based application with access controls including; user ids, passwords, ip restrictions	👍
Color coded highlighted matches with time and line number stamps	👍
Personalized App Users	👍
Responsive and adaptive apps, Optimized experiences across desktop, tablet and mobile devices.	👍
GDPR-General Data Protection Regulation ; PCI (Payment Card Industry) & Section 508 compliance-Built-in privacy, security and accessibility compliance for your data and apps.	👍
Daily backup retention- Enjoy peace of mind that your entire account is backed up and preserved for 7 day retention period.	👍
Disaster recovery	👍





# Try Caperio Performance Platform Today

The best way to understand the exponential business impact the Caperio performance platform delivers to call center teams and agents, both local and remote, is to explore roles and capabilities live.

To accelerate your evaluation, we are providing access to qualified organizations looking to take control of growth and revenue across each interaction. You can request free access at [Caperio.AI](https://Caperio.AI) for a limited time.

To learn more about how companies are leveraging next-generation AI for exceptional performance with the Caperio Performance Platform, review our case studies and customer successes by visiting [Caperio.ai](https://Caperio.ai) and our company site at [bossanovadata.com](https://bossanovadata.com).

# Thank you.

## About BossaNova:

We believe performance is about giving people opportunity to be their absolute best. Our solutions are designed for everyone to gain strong advantage to collaborate and succeed working together. We find joy and purpose in what we do and how we do it.

Bossa Nova Data Solutions, LLC is a leading data science company founded in Weston, Florida U.S.A. in 2006. In 2010 our location in São Paulo, Brazil was added.

We operate in the intersection of Artificial Intelligence and Exceptional People Performance, providing data driven solutions that leverage artificial intelligence capabilities including; Machine Learning, Predictive Modeling, Automatic Speech Recognition, & Natural Language Processing.

Our flagship is the Caperio Performance Platform, used by the largest banks and financial services companies.

Our cloud-based platform and library solutions are fully customizable, easy to implement, and require no upfront investment in hardware or software.

## Contact Us

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