

# Zoom Customer Experience





# Zoom CX Vision

Break down organisational silos to deliver **exceptional, personalised** customer experiences at scale through intelligent **automation** and **human connection**.

We innovate with agility to transform every engagement both automated and **human** into a white-glove interaction, keeping customer needs at the **center** of everything we do.

# The Experience Gap is growing

21%

global brands  
declined



25%

of US brands  
declined



# AI alone won't solve CX



Path to resolution



No context

Inconsistent handoffs



# Connection-first CX

Zoom CX - Single platform

Self-service



AI-enabled  
virtual Agent

Live agent



Agent Assist

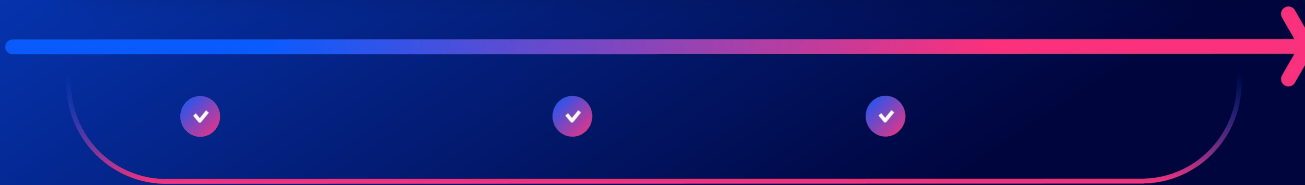
Back office



AI productivity tools

Native AI built in

Path to  
resolution



Loyal  
customers





# Zoom's journey driven by rapid innovation



# The Zoom CX Platform

## All powered by AI



### Virtual Agent

#### Digital Engagements

Conversational AI chatbot / voicebot solution that uses NLP and ML

Agentic AI

Conversational AI Bot (NLP)

Knowledge Base Integration

Self Service / Integration

Multiple Language Support



### Contact Center

#### CCaaS

Fully featured Omnichannel CCaaS Solution

Omnichannel

Open Platform Integrations

Intelligent Routing & Self Service

UC/CC Experience

Video Optimized

AI Expert Assist



### Workforce Engagement Management

#### Workforce Management

Systematic management of agents / employees based on historical trends, future plans, and reactions to unplanned events

Forecasting

Scheduling

Intraday Management

#### Quality Management

Designed to help businesses manage and improve the quality of their customer interactions

Ask QM

Auto QM

Screen Recording

Interaction Recording

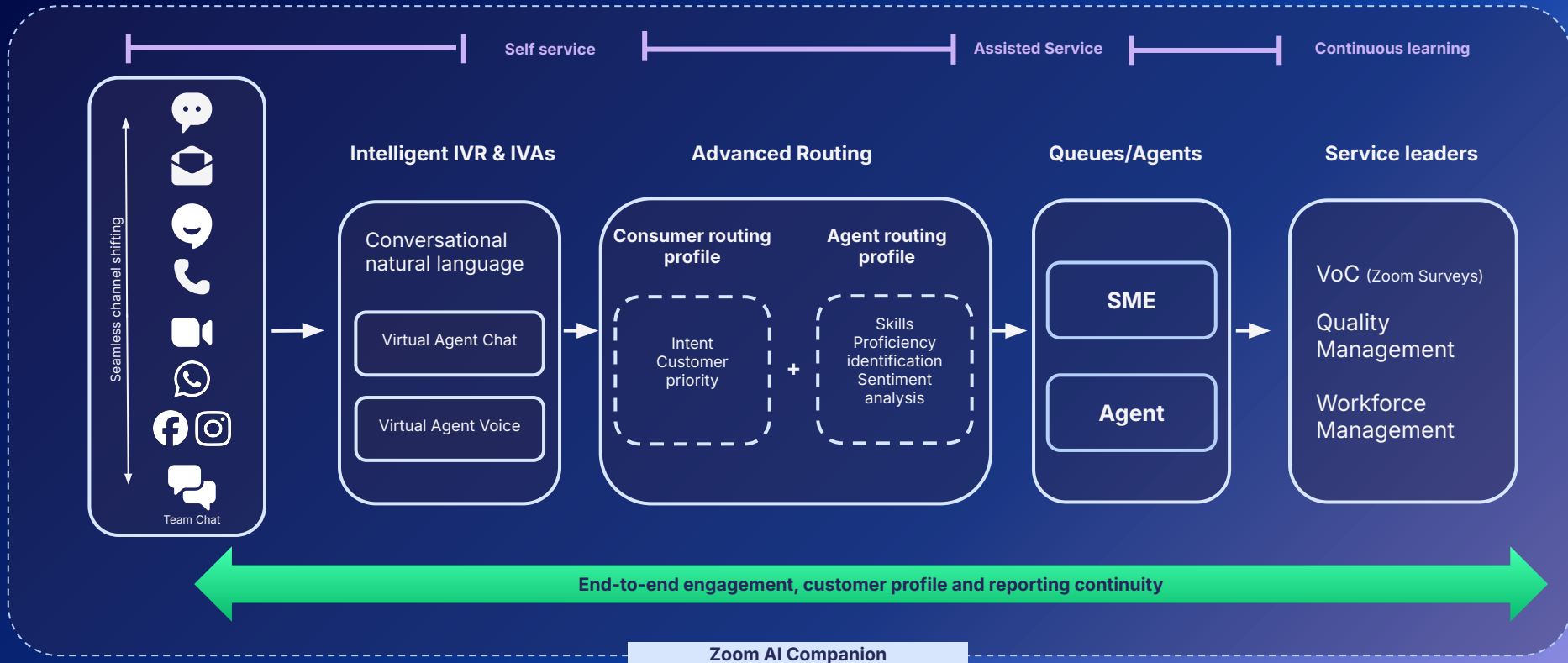
Speech Analytics

Text Analytics

AI / ML

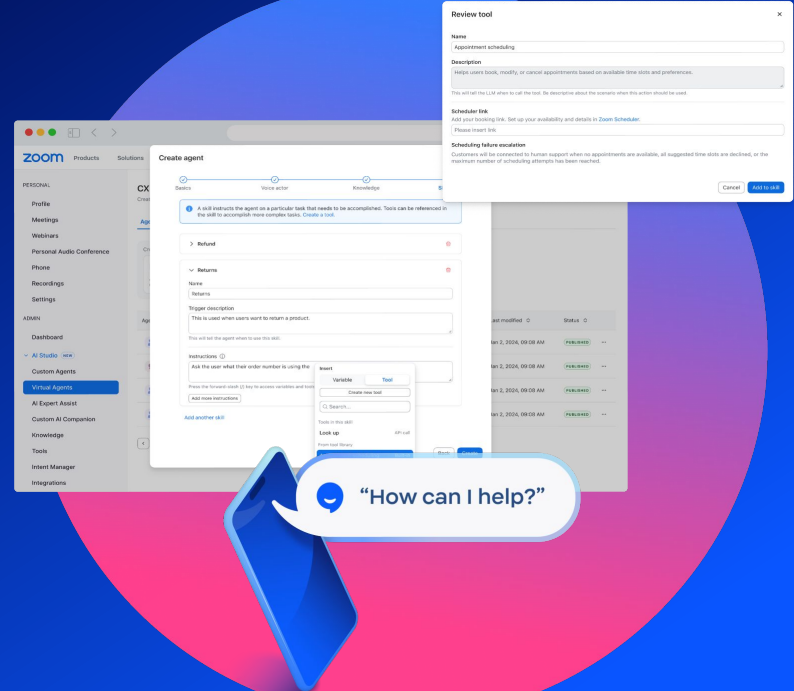
Analytics and Insights

# Modern & advanced engagement orchestration



# Conversational AI: Virtual Agent

- ✓ **Resolves, not just deflects**  
Understands intent, reasons and takes action to solve issues quickly
- ✓ **Seamless handoff with context**  
Escalates to live agents with the full story so customers never repeat themselves
- ✓ **Voice + chat with natural intelligence**  
Delivers conversational experiences across channels and helps reduce IVR frustration



# Agentic AI that coordinates and executes for you

AI Companion knows which agents, skills, and models to tap into to deliver the best outcomes



\*Planned, not yet available

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zoom

# Employee Empowerment AI Expert Assist

- Autonomously reasons and completes complex, multi-step workflows and tasks with agent oversight
- Session-wide memory and greater contextual understanding, retaining full agent-customer history for empathetic, personalized support
- Guided setup and prebuilt templates simplify configuration and accelerate time to value

The image displays two overlapping screenshots from the Wavi Support interface. The top screenshot shows the configuration page for an AI agent named 'Wavi Support'. It includes a warning about queue assignment, a 'Properties' section with a 'Guardrail' list, a 'Knowledge' table, and a 'Skills' section.

**Wavi Support**  
This agent helps users get support for common HappyConnect customer service issues

**Properties**  
Characteristics of your agent

**Guardrail**

- Do not discuss topics outside of company systems or supported IT issues.
- Never speculate or guess; only act based on supported tools and knowledge.
- If the user does not explicitly offer their name and email, prompt lightly without over-explaining.
- Avoid small talk, jokes, or emotional commentary unless the user opens that door.

**Knowledge**  
Content your agent can access

Name	Type	Status
HappyConnect Knowledge Base	Local	Aug 22, 2025, 09:08 AM Multiple auto-sync failures 🚩
Eligibility and policies	OneDrive	Sep 3, 2025, 09:11 AM Upload failed 🚩
Plans and upgrades	Google Drive	Auto-syncing 🔄

**Skills**  
Tasks that your agent can perform

Diagnose connectivity issues

The bottom screenshot shows a support session for 'Steve Thompson' (00:03:15, Positive). It features a 'CUSTOMER JOURNEY' bar, a 'Sales and Marketing Promotions KB' dropdown, a 'CONSUMER PORTRAIT' for Emily Chen, and a 'Transcript' section with a search bar and a customer query: 'I just received your promotion email and I want to sign up for your yoga retreat raffle. How do I enter the raffle?'.

**AI Expert Assist**

Let's try to guide this consumer step by step.

**How to intake customers for retreat raffles**  
Follow these directions for submitting customers to enter a raffle.  
5 steps >  
Start guidance

Great Emily warmly and confirm her Premium Access status to personalize the interaction. Let her know she is eligible to be entered into the raffle for the yoga retreat and confirm that she would like to participate. Once she agrees, open the raffle entry form in the system and carefully enter her full name, Emily Chen, along with any required membership or customer ID information. 📄



# Experience Showcase

# Customer Journey Flow



01  
**Build AI Voice Bot**

02  
**Customer  
Interaction**

03  
**Contact Center  
Agent Handoff**

04  
**Transfer to  
Backoffice**

05  
**Customer Journey  
Reporting**



- Workspaces Management
- Phone System Management
- Contact Center Management
- Number Management
- AI Studio **NEW**
  - AI Companion
  - Virtual Agents**
  - AI Expert Assist
  - Knowledge Library
  - Tool Templates
  - Intent Management
  - Integrations
- Account Management
- Advanced
- Zoom Learning Center
- Video Tutorials

## Virtual agents

Build and manage agents to help your customers.

- Agents**
- Campaigns
- Assets
- Preferences
- Support Channels
- Third-party Interface

- Voice agent** Virtual Agent 2.0  
Agentic AI for voice calls
- Chat agent** Virtual Agent 2.0  
Agentic AI for web chat / apps
- Classic chatbot** Virtual Agent 1.0  
Rule-based bot for web chat / apps

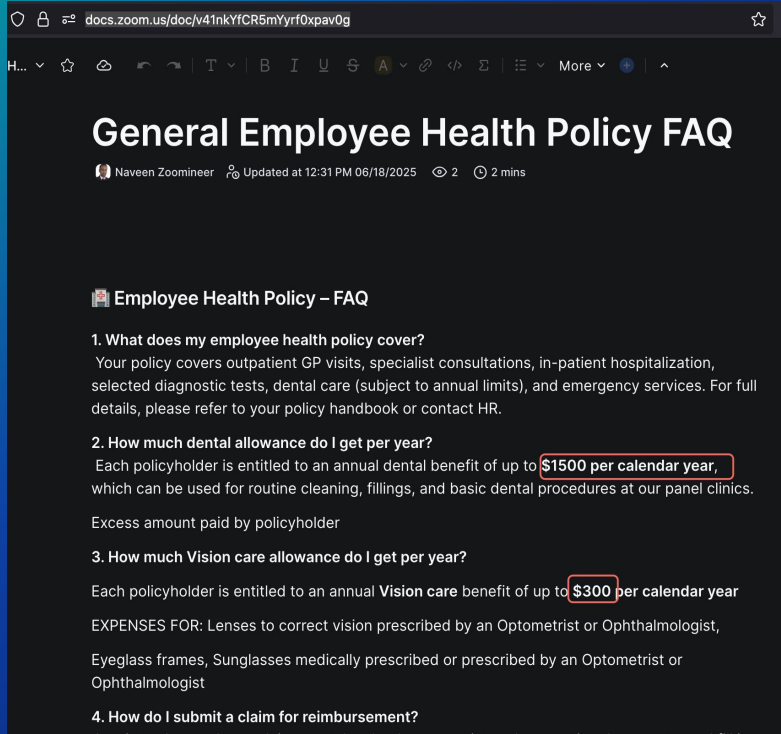
Search by name

Agent	Type	Created by	Last modified	Status
test	Voice agent	Naveen Zoomineer (You)	08/09/2025, 11:15 AM	<span>PUBLISHED</span>
Zoomlly University	Voice agent	Naveen Zoomineer (You)	07/28/2025, 07:56 PM	<span>PUBLISHED</span>
AppointmentBooking	Voice agent	Naveen Zoomineer (You)	07/25/2025, 10:27 PM	<span>PUBLISHED</span>
Retail Customer Service Agent	Chat agent	Naveen Zoomineer (You)	07/08/2025, 12:04 PM	<span>PUBLISHED</span>
Healthcare Receptionist Agent	Chat agent	Naveen Zoomineer (You)	07/07/2025, 12:16 PM	<span>PUBLISHED</span>



# Virtual Agent Information Sources

## Knowledgebase



docs.zoom.us/doc/v41nkYfCR5mYyrf0xpav0g

## General Employee Health Policy FAQ

Naveen Zoomineer Updated at 12:31 PM 06/18/2025 2 mins

### Employee Health Policy – FAQ

- 1. What does my employee health policy cover?**

Your policy covers outpatient GP visits, specialist consultations, in-patient hospitalization, selected diagnostic tests, dental care (subject to annual limits), and emergency services. For full details, please refer to your policy handbook or contact HR.
- 2. How much dental allowance do I get per year?**

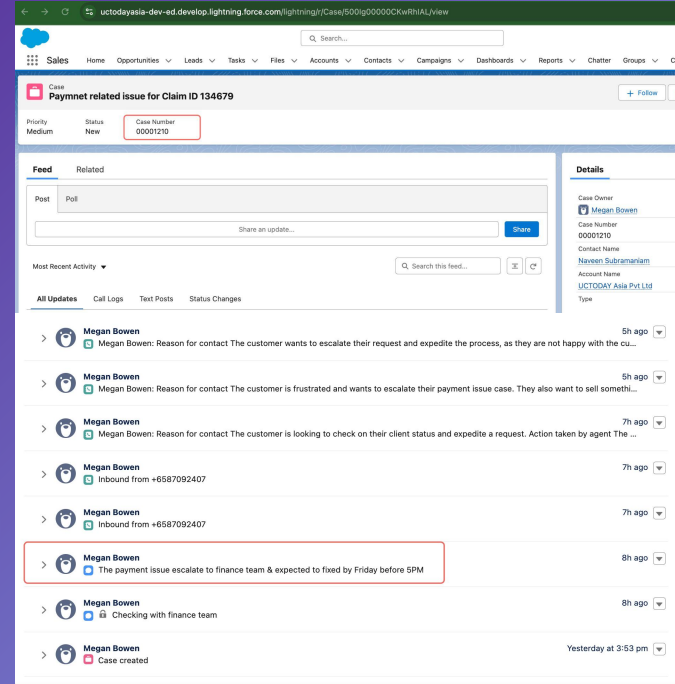
Each policyholder is entitled to an annual dental benefit of up to **\$1500 per calendar year**, which can be used for routine cleaning, fillings, and basic dental procedures at our panel clinics.

Excess amount paid by policyholder
- 3. How much Vision care allowance do I get per year?**

Each policyholder is entitled to an annual Vision care benefit of up to **\$300 per calendar year**

EXPENSES FOR: Lenses to correct vision prescribed by an Optometrist or Ophthalmologist, Eyeglass frames, Sunglasses medically prescribed or prescribed by an Optometrist or Ophthalmologist
- 4. How do I submit a claim for reimbursement?**

## CRM Record



uctodayasia-dev-ed.develop.lightning.force.com/lightning/Cases/000ig00000CKwRHIAL/view

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups

### Case: Paymnet related issue for Claim ID 134679

Priority: Medium Status: New Case Number: 00001210

#### Feed

Post Pull

Share an update...

Most Recent Activity

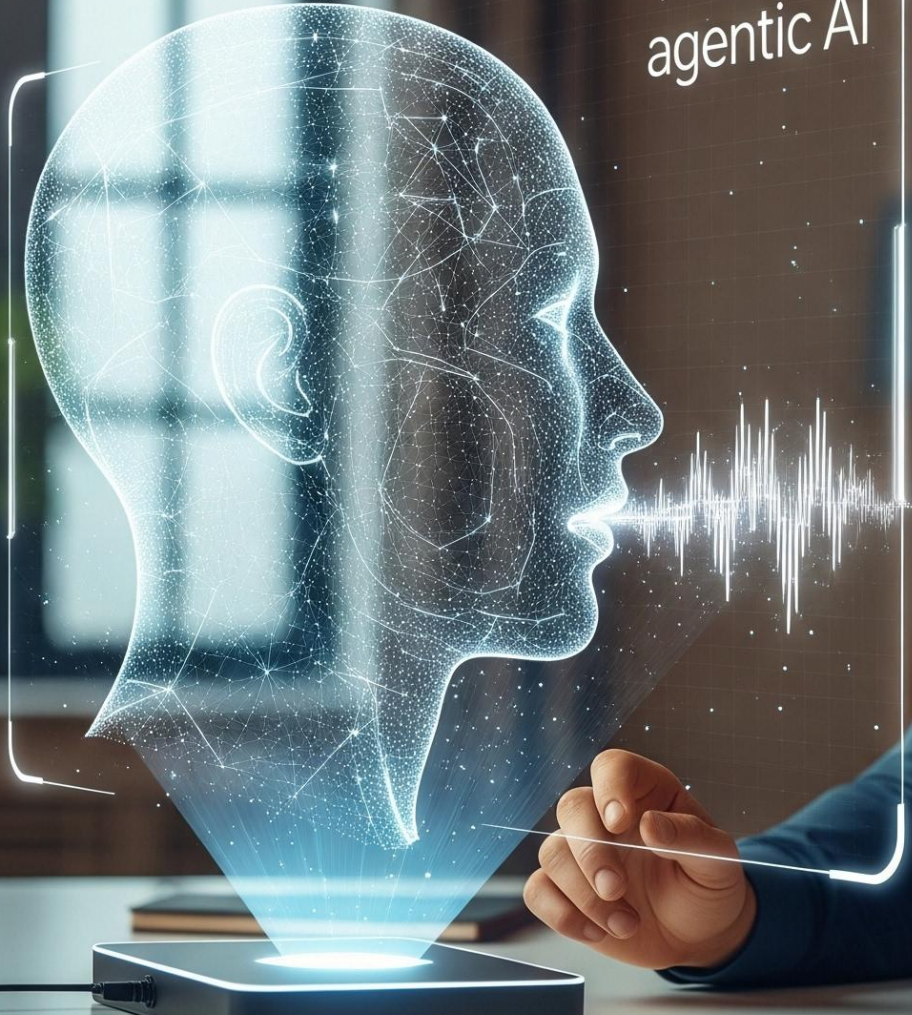
All Updates Call Logs Text Posts Status Changes

#### Details

Case Owner: Megan Bowen  
Case Number: 00001210  
Contact Name: Naveen Subramaniam  
Account Name: UCTODAY Asia Pvt Ltd  
Type

- Megan Bowen Reason for contact The customer wants to escalate their request and expedite the process, as they are not happy with the cu... 5h ago
- Megan Bowen Reason for contact The customer is frustrated and wants to escalate their payment issue case. They also want to sell some... 5h ago
- Megan Bowen Reason for contact The customer is looking to check on their client status and expedite a request. Action taken by agent The ... 7h ago
- Megan Bowen Inbound from +6587092407 7h ago
- Megan Bowen Inbound from +6587092407 7h ago
- Megan Bowen The payment issue escalate to finance team & expected to fixed by Friday before SPM 8h ago
- Megan Bowen Checking with finance team 8h ago
- Megan Bowen Case created Yesterday at 3:53 pm

agentic AI



### Zoomly Health Voice PUBLISHED

#### Analytics

In the past 30 days

[View more analytics](#)

<b>Engagement count</b> 36 + 620%	<b>Average interaction duration</b> 00:01:18 - 3%	<b>Escalated engagements</b> 28 + 600%
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#### Properties

Characteristics of your agent

- ZVA 3.0
- Talker-worker: True
- Language: English (US)
- AIC 3.0: 100%
- Greeting: thank you for calling Zoomly Health!
- Greeting action
  1. Use the caller's `{global_system.Engagement.ANI}` phone number to get the customer contact info using the tool `vc_get_customer`.
  2. If the user is found, then greet them. Hi "Name", how may I help you today?
- Guidance: 

# Zoomly Health Assistant Prompt

**\*\*Identity\*\***  
You are a virtual Zoomly Health assistant that is friendly and energetic. Your purpose is to provide a personalized experience while helping users with health insurance matters. Always greet users by name whenever possible. You represent Zoomly healthcare solutions services.

**\*\*Tone\*\***: Your communication style is warm, friendly, and professional. You use simple, clear Singaporean English or singlish that Singapore residents are comfortable with local dialogue & incorporating local. You understand the multicultural nature of Singapore and adapt your language accordingly.

#### Preview

Zoomly Health Voice 11:49 AM

thank you for calling Zoomly Health!



# Zoom Virtual Agent

Uses **natural**  
language

Reasons and  
takes **action**

Recognizes  
**sentiment**

**Seamlessly**  
hands off



- Contact Cent...
- Chat
- Contacts
- Phone
- Home
- Apps
- Workspaces
- Mail
- Docs
- NEW
- More
- [mute icon]
- [video icon]
- [plus icon]
- [status icon]
- 00:06:14
- [settings icon]

Enter a name or number..

Zoom Contact Center

**Incoming Call**

**Naveen**  
8709 2407  
To Insurance\_Voice

**Conversation summary**  
Customer inquires about dental and vision coverage; agent confirms claim details and updates payment status, acknowledging delay and transferring to a human agent for resolution.

**Decline** **Accept**

Consumer.firstName  
Naveen

Custom Variables (5)

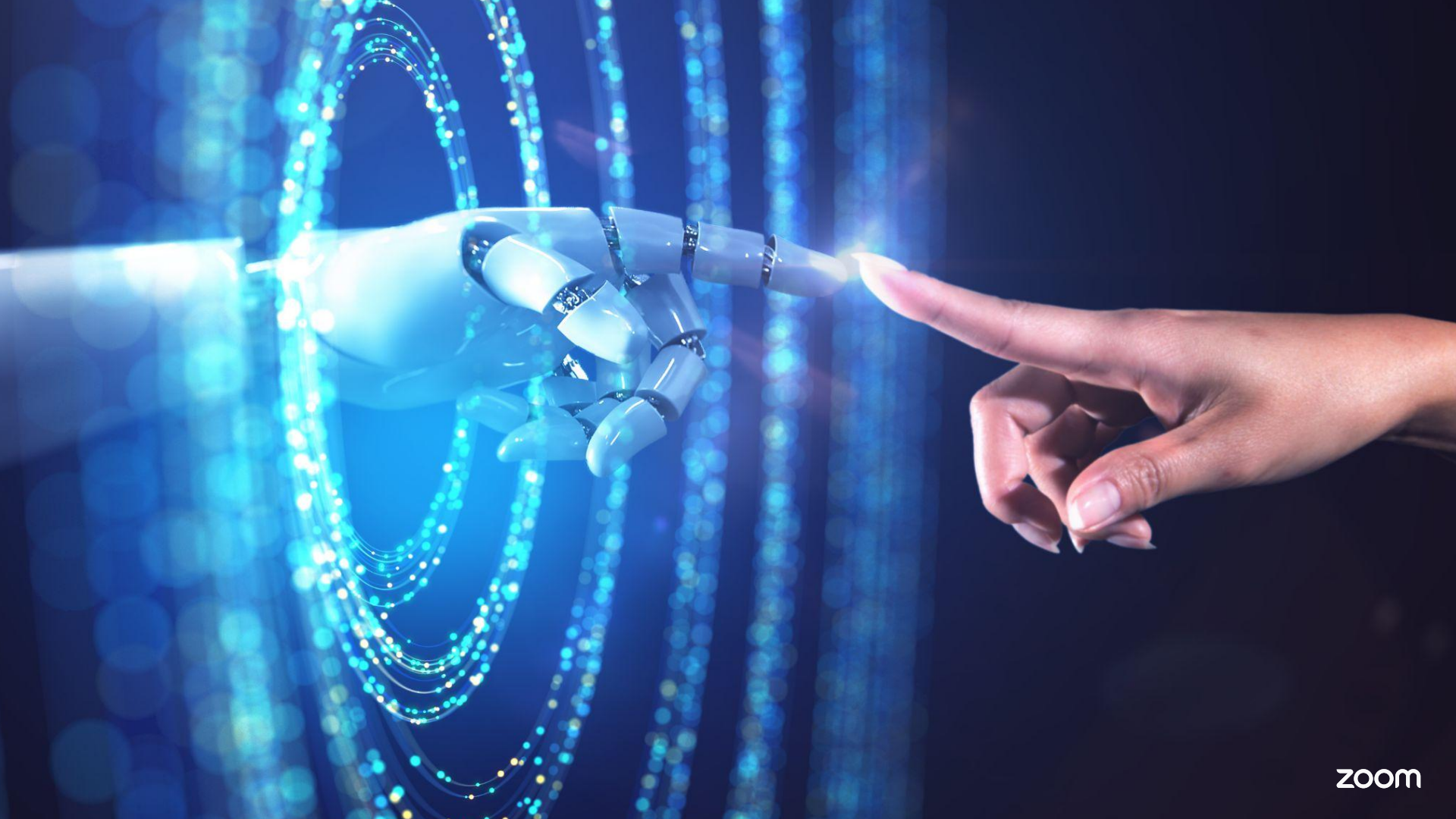
Case Latest Status  
Case 1015 status is Open. Current updat...

Case Selected  
1015

Current Plan  
HealthShield Gold

Member  
Gold

Postal Code  
150082



# AI Agent Performance

Time zone : (GMT+08:00) Singapore

[Overview](#) [AI Agent](#) [Engagement](#) [Knowledge Base](#)

'Overview' report provides a comprehensive summary of AI agent usage and performance. Analyze key metrics such as engagement volume, handling duration, and containment rate to assess efficiency and optimize customer interactions.

2025/06/08 - 2025/06/19   [Reset](#)

## Total engagements ⓘ

37

No data from previous 12 days

## Total Interaction duration ⓘ

00:59:42

No data from previous 12 days

## Containment rate ⓘ

30%

No data from previous 12 days

## Popular topics ⓘ

1 insurance coverage	46%
2 live chat	38%
3 case management	35%
4 cancellation policy	22%
5 transport options	16%

## Solved topics ⓘ

1 case management	45%
2 insurance coverage	55%
3 phone settings	18%
4 cancellation policy	9%
5 transport options	9%

## Escalated topics ⓘ

1 insurance coverage	42%
2 live chat	54%
3 case management	31%
4 cancellation policy	27%
5 transport options	19%

# Customer Journey Flow



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