

:talkdesk®

Electric & Gas Industries

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EGIA Discovery Report

Document Overview

The purpose of this document is to outline the Talkdesk implementation project and function as the blueprint for configuration efforts. Talkdesk will only build the functionality and scope documented within this Discovery Report upon receipt of EGIA acceptance. The Discovery Report acts as a bridge between the business solution outlined in the Statement of Work (SOW) and the technical solution contained within the requirements and attached documents below. Refer to the overseeing SOW and Master Service Agreement (MSA) as the governing documents above this report.

EGIA Goals and Success Criteria

The Talkdesk implementation project will be based around the following business goals and Critical to Quality (CTQs) objectives:

- *Successfully replace intent-based Autopilot with Agentic AI Autopilot without disruption to existing contact center operations*
 - *Key Success Indicators:*
 - *Agentic AI Autopilot is live and handling interactions as designed*
 - *Comparable or improved containment rate versus the intent-based Autopilot*
 - *Accurate handoff to live agents when required*

Project Delivery

Client Name	Electric & Gas Industries Association (EGIA)
Production Talkdesk Domain	https://egiaproduction.mytalkdesk.com/
Talkdesk Primary Resources	Samantha Sanchez - Project Manager Danielle Abbott - Sr Solutions Consultant

Client Key Stakeholder(s) &
Discovery Report Owner

Clinton Cramer - Director - IT Program Management
Eddie Javaid - Chief Technology Officer

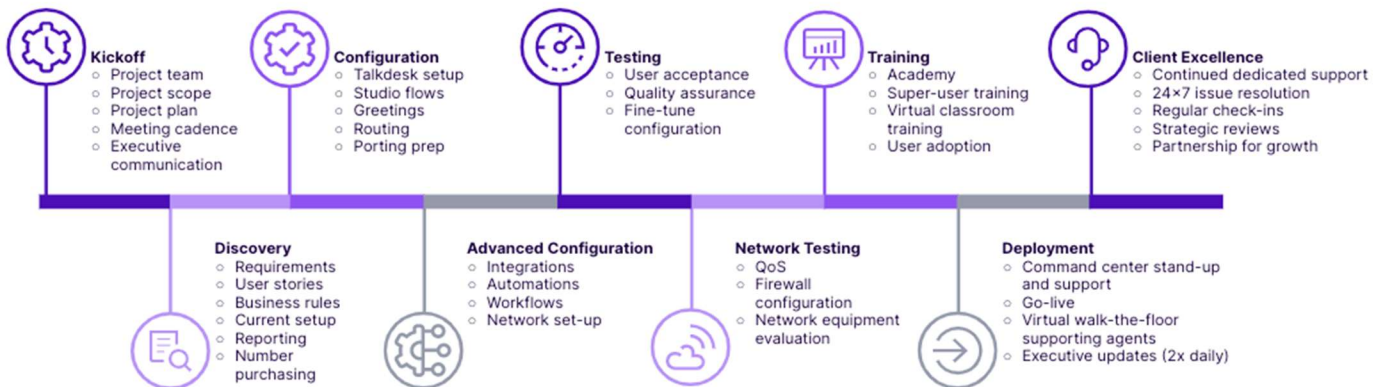
Products Being Deployed

- Agentic Autopilot (FAQ)

Integrations Overview

- Salesforce Standard Integration

Talkdesk Implementation Workflow



Functional & Technical Requirements

Agentic Autopilot (Voice)

Talkdesk will configure seven (7) Agentic Autopilot Flow to intelligently route inbound calls to the appropriate AI or live resource based on caller intent. The AI will handle natural language interactions to identify the reason for the call and direct accordingly.

Note: All calls and messages will first be handled by Agentic AI. Interactions will only be routed or escalated to Live Agent Ring Groups when the AI cannot resolve the inquiry or when the caller specifically requests an escalation, regardless of business hours, after-hours, or holiday schedules

Talkdesk will configure one (1) Agentic Autopilot, assuming the following scope:

- Agentic Autopilot Goals:
 - Provide General information (FAQs)

- Understand the caller's / written message's intent and identify/respond in the contact's language.
- FAQ detection based on the use of Search Knowledge component with content configured in the Talkdesk Knowledge Management.
- Includes External Sources with a web crawler of up to ten (10) seed URLs, with up to two (2) page levels deep, and up to one hundred (100) links per page.
- Talkdesk will provide testing support and prompt fine-tuning for up to ten (10) FAQs per Agentic.
 - Client is responsible for testing additional Q&As configured in the solution.
- If the FAQs do not resolve the question, Talkdesk will escalate the conversation to a Studio Flow for basic routing to a Ring Group or an Agent.
 - Includes up to one (1) Action path to be used for escalations.
- Talkdesk's Responsibilities:
 - Configuration of the AI Agent Orchestrator prompts (Name, Description, and Instructions)
 - Context variables creation and description (as applicable)
 - Configuration of up to one (1) AI Agent(s) for specific instructions (as applicable).
 - Configuration of up to ten (10) Knowledge Management Cards or External Sources (PDF files / Web Crawler URLs);
- Client's Responsibilities:
 - Client will be required to build, manage and maintain the external articles accordingly or can use the Talkdesk Knowledge Management product as an in-house knowledge solution for the FAQs.
 - Client is responsible for providing the descriptions (ie. instructions to the LLM model) for the Automation Goal, Variables, and Actions.
 - During the testing phase and after going live, Client will be responsible for fine tuning descriptions as required.
 - For the API calls mentioned above, assume the Client will provide REST APIs that meet the minimum requirements for the use case. See Talkdesk Connections integration assumptions in Section V.
 - Product is part of a Preview program, not all features and functionality will be available.
 - Note: Any Autopilot integrations, advanced features, or experiences beyond the above scope are not included in this engagement. Additional requirements will need a Change Order.

Agentic Virtual Agent (Voice)

- AI Model Name: Agentic Autopilot (FAQ)

- Language: English

Goal:

Identify the purpose of the call, answer general questions and/or provide rebate statuses and rebate information.

Flow Experience / Features:

- Main Agent: Gather purpose of call
- Rebate Agent: Collect customer details (Phone number, zip code, last 6-digits of rebate number or/full reservation number). Identified via Data Dip for rebate status check
- FAQ Agent: For general FAQs regarding rebates and general rebate information. Reference Knowledge Management (KM) to resolve common inquiries.
- Escalation Agent: Escalate to the appropriate live agent if KM does not resolve the issue. Ensure routing logic adheres to business hours
- Provide fallback or error handling to guide callers with alternate options when necessary

Routing Conditions

- Escalations will route to the appropriate ring groups based on DNIS dialed (Social or not) and several other indicators, such as Turf Check, Commercial or Residential check, Turf or Device Check.
 - See EGIA Rebate Autopilot (JSON) for details.

Integrations & APIs

Standard Talkdesk Integrations

Salesforce

- Talkdesk will assist in Talkdesk for Salesforce integration with the following functionality:
 - Contact Sync
 - Contact Pop for known contacts
 - Talkdesk will provide configuration support and guidance for up to two (2) Standard Automation(s) based on available Talkdesk events. Client is responsible for configuring any additional automations.
 - Click-to-call extension
 - Omnichannel for Agent Status Sync
 - Relate To widget enablement to allow agents to relate calls to Salesforce objects

- Assumes integration into one (1) Client's Salesforce Org.
 - If integration to additional Salesforce Orgs are needed, a Change Order will be required.

Business Continuity Planning

Client will be responsible for incorporating Business Continuity protocols following the guidelines provided by Talkdesk in the Whitepaper: [Business Continuity Planning](#)

User Stories & Acceptance Criteria

[User Story Guide](#) outlining all defined user stories and acceptance criteria for the following personas (see relevant tabs):

- a. Audience/Callers (Studio Flows)
- b. Agents
- c. Managers/Supervisors
- d. Administrators
- e. Client Defined User Stories

Training

Training Requirements

- **Number of Training Credits Available: 1**
 - *Each training credit is valid for (1) session up to two (2) hours in length, valid for any combination of training sessions outlined in the SOW.*
- Trainings that will be delivered in this project/phase:
 - (1) Agentic AI Training Session
 - Focuses on deep dive Agentic AI functionality & Management
 - Targets the 'trainer' Administrator audience

Implementation Workbook & Supporting Documents

[EGIA Rebate Autopilot](#)
[EGIA - Agentic Agent Discovery Form](#)

Deployment Plan - Key Milestones

[Project Plan Access](#)

Milestone	Target Completed Date
Kick Off:	Line three
Discovery:	Line three
Core Configuration:	Line three
Client UAT:	Line three
Training:	Line three
Go Live:	Line three

Travel & Billing

All work will take place remotely unless otherwise specified in the SOW or agreed upon in writing by all parties involved. Any additional travel will incur additional costs billable to EGIA as travel expenses.

Out of Scope

- Refer to the SOW for out of scope items

Key Assumptions

EGIA

- Client is responsible for testing, validating, and controlling network performance for office environments and remote agents.
- Client is responsible for adhering to the Talkdesk system requirements and network settings.

- Client will provide sufficient resources to complete deliverables by the agreed upon project plan milestones/deadlines.
- Client will adequately train and prepare agents before Go Live to ensure a seamless transition for the end users.
- Client will agree to the requirements and technical configurations outlined within this Discovery Report in writing before Talkdesk will configure the solution.
- Any work (custom or configuration) on the non-Talkdesk side will be Client's responsibility.

Talkdesk

- Talkdesk will provide (up to) 2-3 weeks of post Go Live support per the SOW.
- Talkdesk will provide the Client with agent training and Support articles relevant to the implemented products.
- Talkdesk will provide a Go Live checklist prior to deployment to help ensure a seamless transition.