



# Business Catalog

We deliver a suite of outsourcing solutions to complement any business operation.





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For more information, please contact the Sales Team:

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# **Our Services**

**KM<sup>2</sup> Solutions**



## CORE SERVICES

- Accounts Receivable Management
- Customer Acquisition
- Customer Sales
- Customer Care
- Customer Retention
- Product Support
- Third-Party Verifications
- Payment Services
- Appointment Setting
- Back Office



## Why KM² Solutions?

KM² Solutions is an award-winning BPO with over two decades of experience operating an exclusively nearshore strategy throughout the Caribbean and Latin America. The company provides clients with a host of outsourcing solutions, including customer care, receivables management, technical support, sales & marketing, data analytics, and back-office processing. KM² Solutions maintains PCI DSS compliance, completes an annual SOC 2 audit, and has a Compliance Management System that aligns with the FDIC.

# ACCOUNTS RECEIVABLE & COLLECTIONS

KM² Solutions provides high-quality, cost-effective receivables management services. We help clients acquire new customers, support existing customers, and help prevent accounts from slipping into delinquency.

- We support top Fortune 500 companies in industries such as Financial Services, Technology, Retail/eCommerce, Utilities & Energy, Communications & Media, Cable & Wireless, Travel & Hospitality, Healthcare, Consumer Packaged Goods, and Automotive.
- We support customers of all credit rankings, from high-quality to subprime.
- KM²'s pricing is up to 50% lower than the typical domestic contact center cost.
- We outperform in all key receivables management metrics, including Right Party Contact, Promises to Pay, Kept Rate, Dollars Collected, Average Handle Time, and Calls per Day.
- All our contact center locations are in regions with extensive service sectors, which allows for multilingual, high-quality collections practices, even when curing highly delinquent accounts.
- **KM² Locations:**

- Barbados
- Colombia
- Dominican Republic
- Grenada
- Honduras
- Saint Lucia



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## CORE SERVICES

- Data Entry
- Data Mining & Analytics
- Order Processing
- Document Verification
- Document Digitization
- Document Management
- Audio and Video Transcription
- Photo Retouching
- Translation Services
- Web Research
- Content Moderation
- Billing and Invoicing



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# BACK-OFFICE PROCESSING

At KM² Solutions, our agents are highly trained to perform all back-office functions. We provide everything from transcription services and data entry to application processing and document management. Also, with our extensive experience working for credit providers and related industries, KM²'s verification services are of the highest standard.

- We support top Fortune 500 companies in industries such as Financial Services, Technology, Retail/E-Commerce, Utilities and energy, Communications and media, Cable and wireless, Travel and hospitality, Healthcare, Consumer Packaged Goods, and Automotive.
- KM²'s pricing is up to 50% lower than the typical domestic call center agent cost.
- We outperform in all key back-office metrics, including Case Completion Rate, Error Rate, Case Quality Score, and Average Handle Time.
- All our contact center locations are in regions with high multilingual literacy rates; therefore, we can provide back-office functions with the utmost attention to detail.
- **KM² Locations:**

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# BILINGUAL SUPPORT & TRANSLATION SERVICES

## KEY ADVANTAGES

- Personalised Service
- Enhance CX
- Lower Abandon Rate
- Minimize Attrition
- Reduce Handle Time
- Improve Conversion
- Retain Existing Customers
- Increase Brand Loyalty
- Cost Savings



KM<sup>2</sup> Solutions specializes in high-level Bilingual Support. With over 14% of the U.S. population speaking Spanish at home, and that number growing, KM<sup>2</sup> can meet this increasing demand for bilingual support across its full range of products and services.

All of our bilingual agents, whether in Customer Care, Collections, or Sales, are equally proficient in English and Spanish, allowing customers to interact at a higher level than other nearshore alternatives.

### Active Translation Services

KM<sup>2</sup> Solutions also provides Active Translation Services. Our Bilingual (English/Spanish) Agents can be 100% trained on a client's products and services, allowing them to perform real-time, in-call translation for customer/client calls. This service can reduce handle time for bilingual transactions by over 66% on average.



Most of our bilingual employees come from Immersion School systems, which means they speak English in schools from an early age. Not only are they bilingual, but their English proficiency and communication skills are of the highest caliber. Translation services are just one of many tailored services KM<sup>2</sup> provides to our clients. We can offer customized solutions to meet any client's needs.

## Why KM<sup>2</sup> Solutions?

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## CORE SERVICES

- Customer Service
- Customer Retention
- Customer Acquisition
- Sales and Upsells
- Account Management
- Welcome Calls
- Claims/Loan Processing
- Reservation Management
- Scheduling
- Technical Support
- Live Chat
- Email Support



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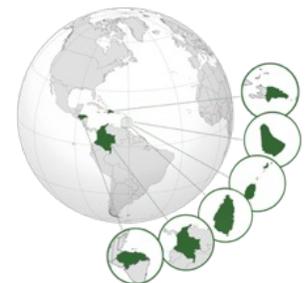
## CUSTOMER CARE

KM² Solutions provides customer care and relationship management services to clients of all types. In doing so, KM² helps companies improve customer satisfaction while reducing costs and increasing revenue.

- We support top Fortune 500 companies in industries such as Financial Services, Technology, Retail/E-Commerce, Utilities and energy, Communications and media, Cable and wireless, Travel and hospitality, Healthcare, Consumer Packaged Goods, and Automotive.
- KM²'s pricing is up to 50% lower than the typical domestic contact center cost.
- We outperform in all key customer service metrics, including First-Contact Resolution, Average Handle Time, Service Level, and C-SAT (Customer Satisfaction Score).
- All our contact center locations are in regions with extensive service sectors, providing multilingual agents who are not only professional but highly skilled in quality customer care and support.

### KM² Locations:

- Barbados
- Colombia
- Dominican Republic
- Grenada
- Honduras
- Saint Lucia

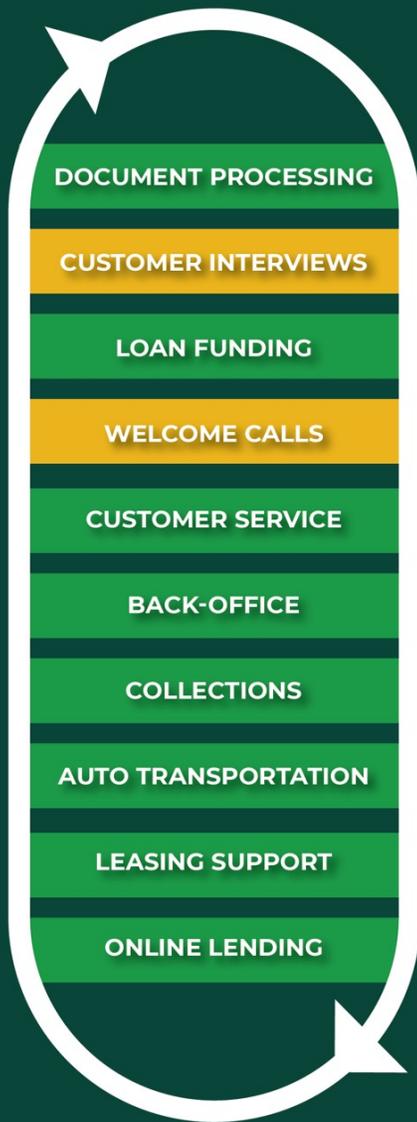


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## AUTO FINANCE LIFECYCLE



# CUSTOMER INTERVIEWS & WELCOME CALLS

KM² Solutions supports the entire Auto Finance Lifecycle in an omnichannel environment. Two of the key customer interactions that occur are Customer Interviews and Welcome Calls.

Typically, the **Prefunding Customer Interview** (“CI” or PFCI”), occurs during the pre-funding/originations phase and under the lender’s Loan Originations group, which typically handles all functions prior to and including the approval of the loan.

**Welcome Calls** are typically a function of Loan Servicing and are handled by Customer Service agents within that group once the loan has been funded.

### These initial types of contact include:

#### CUSTOMER INTERVIEWS

- Potential customers may be asked to validate:
  - Best contact information
  - Vehicle Information / Details (Make/Model, Year, Options, etc.)
  - Payment Information (Sale Price, Down Payment, etc.)
  - Employment / Income Information
- An agent can instruct potential borrowers to follow up on any discrepancies found with information in an application.

#### WELCOME CALLS

- Congratulate the Customer on New Vehicle Purchase
- Verify Customer Information
- Verify Payment Terms
- Verify Insurance
- Verify Payment Due Dates
- Educate the Customer on how to make the first payment
- Provide various contact channels for future customer needs

Calls are typically outbound. Agents may handle inbound on a call-back basis.



## KEY METRICS

- Calls Per Hour
- Average Handle Time (AHT)
- Queue Cleared
- QA %
- Service Level %
- Adherence %
- Productivity %
- Abandon Rate
- Wrap Time



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## Loan Originations

### Prefunding/Originations Functions

- Document Processing
- Verification of Employment
- Income Verification
- **Prefunding Customer Interview ("CI" or "PFCI")**
- Loan Funding

## Loan Servicing

### Customer Service Functions

- **Welcome Calls**
- General Customer Service
- Title Management/Support
- Extensions Processing
- Credit Bureau Dispute Processing
- Loan Admin/Back Office Support
- Total Loss Claims Processing

### Collections Functions

- Early Stage (Typically <30 DPD)
- Mid-Stage (30-60)
- Late-Stage (60-90+)
- Reinstatements - Loss Mitigation

## Customer and Client Benefits:

- Builds brand awareness/loyalty and creates a connection between lender and borrower: This call is typically a customer's first touch point with the lender.
- Opens line of communication with Customer and Client: Assures lender has accurate and up-to-date customer contact information and highlights available channels of communication available to the borrower.
- Protects Customer's and Lender's Investment: Validates the vehicle being funded (on paper) matches the actual vehicle being delivered.
- Reduces the possibility of delinquency: Explains/sets up payment options, including auto-pay, and re-confirms payment details for the customer.

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## CORE SERVICES

- Technical Support
- Customer Inquiries
- Product Support
- Software Application Support
- Account & Billing Support
- Issue Resolution
- Access Management
- Remote Support
- Escalation Handling
- Feedback Collection



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# HELP DESK SUPPORT

KM² Solutions offers assistance and support services for end users who may experience issues or require help with products, services, or systems. From answering queries, troubleshooting technical problems, assisting with software or hardware issues, offering guidance on product usage, and more.

## Key components of help desk support can include:

- **Technical Support:** Providing solutions to technical problems related to software, hardware, or other IT-related issues.
- **Customer Service:** Addressing customer inquiries and concerns, offering information and assistance to improve customer satisfaction.
- **Omnichannel Support:** Deliver support across all channels, such as phone, email, live chat, and social media, to ensure accessibility and convenience for users.
- **Specialized Knowledge:** Deploy teams with specialized knowledge and skills tailored to the products or services they support, ensuring high-quality service.
- **Scalability:** Help desk services can be scaled up or down based on the client's demand, providing flexibility and efficiency in managing support needs.

KM² Solutions' help desk support allows clients to focus on their core operations while ensuring their customers receive professional and timely assistance. Additionally, it can enable businesses to leverage the expertise and technology of specialized service agents to enhance the overall customer experience.

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## HELPDESK METRICS

- New Ticket Volume
- Volume by Channel
- Support Tickets Solved
- Response Time
- Wait Time
- Resolution Time
- Backlog
- Predicted Backlog
- Ticket Distribution



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# IT & TECHNICAL SUPPORT

KM² Solutions provides a suite of services for outsourced IT & Helpdesk support. From basic services such as route desk to fully integrated systems admin and field support, our highly trained specialists can complement internal and external client teams at every level.

We work closely with our clients to identify pain points and provide comprehensive solutions while excelling in all key metrics. We can integrate seamlessly within client-side operations to provide best-in-class technical support.

## The 3 Levels of Support:

### Level 1: Route Desk

- Order Taking – Create Ticket, Forward to Tech

### Level 2: Service Desk

- Complete Tickets - Take call, remote in, fix basics.

### Level 3: System Admin

- Full System Admin - Desktop Support, Field Support, Facilities Management & HR Issues

## KM² Locations:

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- Colombia
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## CORE SERVICES

- Call Monitoring
- Email Monitoring
- Chat Monitoring
- Text Monitoring
- Data Entry Monitoring
- Process Monitoring
- QA Monitoring
- Compliance Monitoring



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# PROCESS MONITORING

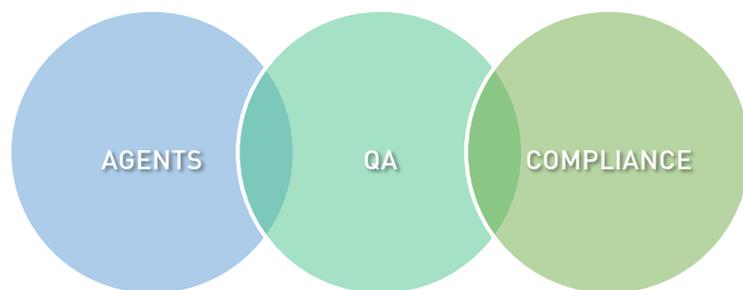
At KM² Solutions, we constantly monitor our internal teams' interactions and processes to ensure quality and compliance at every level. Our dedicated teams of skilled professionals are also available to clients as a resource to assist with their needs internally and externally.

We work closely with our clients to determine that their activities, resources, and behaviors are managed efficiently and effectively. From agent call monitoring to auditing for regulatory violations, we check all processes and generate actionable results.

### The 3 Main Audit Areas:



### The 3 Main Audit Groups:



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## CORE SERVICES

- CSAT Scores
- Net Promoter Score
- First Call Resolution
- Average Wait Time
- Average Handle Time
- Clarity and Tone
- Care and Understanding
- Procedure Adherence
- Compliance Adherence



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# QUALITY MONITORING

As a premier nearshore outsourcing company, KM² Solutions' success is rooted in the quality and competency of all our customer contact representatives. To successfully achieve this, we have developed a stringent monitoring process to ensure quality at every interaction.

KM² Solutions is now extending this service to our clients internally and externally. Our team can lead the monitoring of quality audits throughout a client's organization. We can work independently or alongside a client's internal quality group to ensure that benchmarks are fairly set, assessments are calibrated, and analysis is objective. Leveraging an outside team for quality monitoring also helps uncover potential compliance issues that an internal group or a group monitoring only one team may miss.

## The 5 Elements of Call Quality:



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## CORE SERVICES

- Lead Generation
- Cross-Selling & Up-Selling
- Loyalty Management
- Appointment Scheduling
- Win-Back Programs
- Customer Surveys
- Customer Acquisition
- Customer Retention
- Outbound Sales
- Subscription Management
- Social Media Marketing



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## SALES & MARKETING

KM² Solutions has over 15 years of experience in supporting sales and marketing campaigns for global businesses. Our agents are highly trained in sales and negotiation techniques. We work closely with your brand to drive it forward and give you the freedom to focus on your core operations.

- We support top Fortune 500 companies in industries such as Financial Services, Technology, Retail/eCommerce, Utilities & Energy, Communications & Media, Cable & Wireless, Travel & Hospitality, Healthcare, Consumer Packaged Goods, and Automotive.
- KM²'s pricing is up to 50% lower than the typical domestic contact center cost.
- We outperform in all key sales and marketing metrics, including Pitches Set, Pitches Kept, Conversion Rate, Average Sales Price, Acquisition Cost, Customer Lifetime Value, and Average Handle Time.
- All our contact center locations are in regions with extensive service sectors, allowing for the highest quality, multilingual customer interactions.

### KM² Locations:

- Barbados
- Colombia
- Dominican Republic
- Grenada
- Honduras
- Saint Lucia



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## CORE SERVICES

- Asset Tracking
- Contract Verification
- Picture Verification
- Application Verification
- Address Verification
- Employment Verification
- Claims Processing
- Name/ID Verification
- Content Moderation
- Fraud Prevention



## Why KM² Solutions?

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# VERIFICATION & AUTHENTICATION

KM² Solutions offers a suite of robust verification and authentication solutions as part of our back-office processes. Our highly skilled, highly trained agents harness state-of-the-art technology and custom software solutions to perform standardized processes to ensure the accuracy of information across a raft of customer interactions.

From asset tracking to visual verification, our staff and systems allow us to authenticate our client's customers' correspondence at every step to prevent fraud and seamlessly manage our client's interests.

### Client Example 1:

A well-known finance company relies on KM² Solutions to manage its client's auto inventory. This requires a three-step verification process.

- Audit Function I/O – Confirm Asset Location
- Picture Verification – Visually Inspect Asset & Authenticate
- Payment Distribution – Issue Remunerations

### Client Example 2:

A well-known auto finance company relies on KM² Solutions for its employment verification process:

- Verify Name/ID/Address Details
- Verify Employment History and References
- Submit to Client for Processing

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# **Our Technology**

**MM<sup>2</sup>Solutions**



# AI SIMULATION COACHING



## KEY FEATURES

- AI-Driven Simulations
- Instant Feedback
- Performance Scoring
- Behavioral Analytics
- Skill Tracking
- Personalized Coaching Paths
- Seamless Integration

## BENEFITS

- Faster onboarding
- Faster ramp-up
- Scalable agent training
- Improved training consistency
- Reduced supervisor coaching
- Higher agent confidence
- Stronger CX performance

KM<sup>2</sup> integrates Zenarate, an AI-powered simulation coaching platform that allows agents to learn by doing before ever handling a live customer interaction. Instead of relying solely on classroom training, Zenarate recreates real customer conversations in a natural voice or chat environment.

Agents practice real scenarios, receive immediate feedback, and build confidence before going live. The result is faster ramp-up, stronger performance, and more consistent customer experiences across every program.

### ✓ 56% Faster Time to Proficiency

Agents reach operational readiness significantly faster through repeated real-world practice scenarios.

### ✓ 32% Reduction in Early Attrition

Simulation-based training improves confidence and preparedness, helping reduce new-hire turnover.

### ✓ 20% Increase in QA Scores

Agents develop stronger behaviors and call control before handling live interactions.

By embedding Zenarate into the training process, KM<sup>2</sup> accelerates skill development and shortens ramp time for new agents. Simulation-based learning allows teams to practice real customer scenarios, receive immediate feedback, and refine key behaviors before handling live interactions.

## Why KM<sup>2</sup> Solutions?

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# AI VOICE OPTIMIZATION

## krisp

### KEY FEATURES

- AI Accent Conversion
- AI Acoustic Optimization
- AI Voice Translation
- Agent Assist
- Enterprise-Grade Compliance

### BENEFITS

- Clearer conversations
- Reduced repetition
- Faster call resolution
- Higher customer satisfaction
- Consistent voice experience

KM² agents deliver empathy and expertise in every call, but when it comes to regional accents, there can sometimes be room for improvement. Krisp's AI Accent Conversion solves that challenge. The result is natural, clear, and human conversations that build stronger customer trust and eliminate communication barriers.

#### ✓ **Real-Time Accent Neutralization**

AI automatically smooths regional accents while preserving the speaker's natural voice.

#### ✓ **AI-Powered Noise Cancellation**

Background noise from home offices, call centers, and remote environments is removed instantly.

#### ✓ **Acoustic Optimization**

Voice signals are enhanced for clarity, making conversations easier to understand on both sides.

#### ✓ **Improved Customer Understanding**

Clearer communication reduces repetition, lowers average handle time, and improves first-call resolution.

#### ✓ **Higher CX Performance**

Improved clarity contributes to stronger CSAT, FCR, and NPS outcomes.

Krisp enables KM² Solutions to deliver a consistent voice experience across distributed teams and multilingual environments. By improving voice clarity and reducing communication friction, Krisp supports better customer outcomes while helping agents perform at their best in every interaction.

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# INTELLIGENT RECRUITING



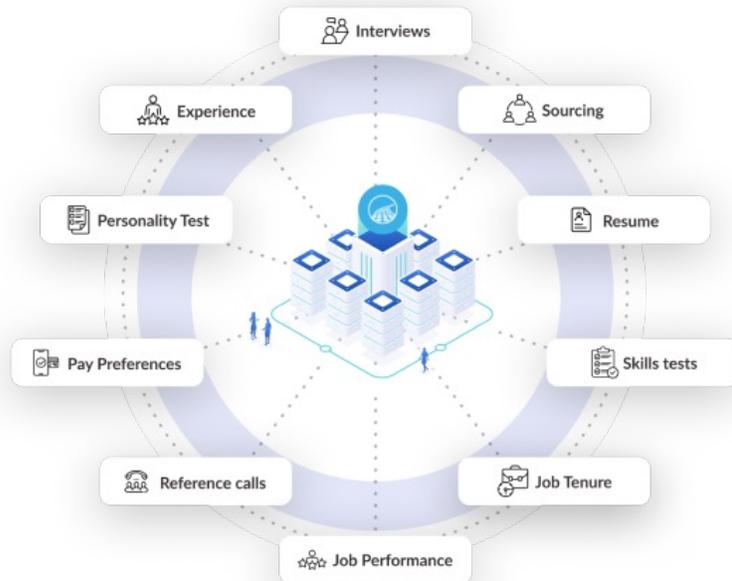
## KEY ADVANTAGES

- ✓ **33%** Turnover Reduction
- ✓ **29%** Performance Increase
- ✓ **61%** Time to Hire Reduction
- ✓ **41%** Quality of Hire Increase

## TOOLS

- Sourcing
- Screening
- Assessments
- Automation
- AI
- Scheduling
- Interview
- Workflows
- Scorecards
- Communication
- Reporting & Analytics
- Integrations
- Offers

At KM², we know how important it is to scale rapidly across multiple sites at any given time. We aim to fill classes at a target rate of two weeks on client request. This means that we need to source many candidates at the highest level at all times. KM² Solutions utilizes JourneyFront, an Intelligent Hiring Suite designed to empower strategic talent acquisition. This data-driven hiring process optimizes speed and quality and delivers real results while reducing the time to hire, increasing the quality of hire, and reducing turnover.



### Screening & Ranking

Screening and ranking tools streamline KM² Solutions' recruitment process, ensuring that only the most qualified candidates advance through each stage. By leveraging data-driven insights, these tools help identify applicants who best fit our culture and performance criteria, reducing the time spent on manual evaluations.





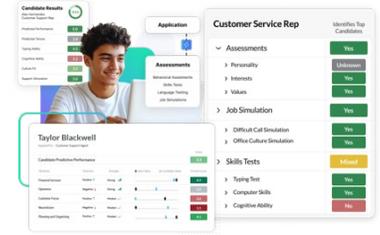
## ASSESSMENT TYPES

- Behavioral Assessments
- Job Simulation
- Skills Tests
- AI-Powered Language Tests
- Realistic Job Previews

*“Journeyfront’s data-driven assessments analyzed existing top-performing employees to refine the hiring process, resulting in a 93% increase in new employee retention.”*

### Predictive Assessments

A suite of predictive assessment tools allows KM² to quickly identify candidates for each role. Integrating assessment results with predictive analytics can significantly increase candidate predictability. Customized assessments based on our data from current and past employees ensure that all recommendations are as relevant as possible.



### Advanced Interview Tools

Advanced interview tools enhance KM² Solutions’ recruitment process by standardizing interviews, ensuring consistency, and reducing bias. These tools provide structured questions tailored to the specific competencies required for each role, enabling recruiters to assess candidates’ skills and cultural fit objectively. Real-time feedback and scoring features streamline decision-making, ensuring faster and more accurate hiring.



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# OMNICHANNEL CX

## zoom

### KEY FEATURES

- AI Expert Assist
- Omnichannel customer engagement
- Zoom Virtual Agent (AI chatbot)
- Integrated Quality Management
- Workforce Management & Forecasting

### BENEFITS

- Faster issue resolution
- Improved agent productivity
- Better workforce visibility
- Consistent omnichannel CX delivery
- Scalable cloud infrastructure

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KM² Solutions utilizes Zoom Contact Center, a modern omnichannel platform that combines unified communications with powerful contact center capabilities. The platform enables KM² to manage voice, chat, SMS, video, and digital interactions from a single integrated environment.

By centralizing communication channels and operational tools, Zoom Contact Center allows agents to engage customers more efficiently while giving supervisors greater visibility into performance and service quality.

#### ✓ **Unified Omnichannel Engagement**

Agents manage voice, chat, SMS, and video interactions from a single platform.

#### ✓ **AI-Powered Agent Assistance**

Real-time guidance and knowledge retrieval help agents resolve customer issues faster.

#### ✓ **Integrated Quality Management**

Built-in analytics and evaluation tools improve oversight and service consistency.

#### ✓ **Workforce Optimization**

Forecasting and scheduling tools ensure the right staffing levels to meet customer demand.

Zoom Contact Center enables KM² to deliver flexible, scalable CX operations across global teams. By combining advanced communications technology with powerful operational tools, KM² helps clients improve service quality, increase efficiency, and deliver consistent customer experiences across every interaction channel.

For more information, please contact the Sales Team:

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 [salesteam@km2solutions.com](mailto:salesteam@km2solutions.com)



# PERFORMANCE OPTIMIZATION & EMPLOYEE ENGAGEMENT

## touchpointone

### KEY ADVANTAGES

- Custom KPI's & Metrics
- Analytic & Quality Modeling
- Messaging & Alert Engine
- Evaluations & Surveys
- Reporting & Trending
- Gamified Rewards/Incentives
- Attrition Tracker

### SUCCESS METRICS

- Increased Attendance
- Employee Satisfaction
- More Dollars Per Contact
- Improved CSATs
- Bonus Percentage Increases
- Reduced Agent Attrition



### Why KM² Solutions?

KM² Solutions is an award-winning BPO with over two decades of experience operating an exclusively nearshore strategy throughout the Caribbean and Latin America. The company provides clients with a host of outsourcing solutions, including customer care, receivables management, technical support, sales & marketing, data analytics, and back-office processing. KM² Solutions maintains PCI DSS compliance, completes an annual SOC 2 audit, and has a Compliance Management System that aligns with the FDIC.

Our client's success depends on the exceptional performance of our people. By utilizing the Acuity Performance Management Platform, we can optimize people, processes, and technology to enhance the employee experience, strengthen culture, and drive better overall performance while reducing attrition.

Through the Acuity dashboard, we can gain access to workflows, immersive data, gamification, and e-learning features that we can use to advance skills while gaining valuable intelligence that empowers supervisors and stakeholders to deliver data-driven coaching and tailor professional development to enhance performance.

### Acuity Features:



- AI-Powered Data & Analytics
- Web-Based Dashboards
- Gamification & Communications
- Voice of the Employee (VoE), Pulse Surveys, Quality Monitor
- Performance Pay, Incentives

Companies with highly engaged workforces outperform their peers by 147% in earnings per share, report 23% better employee turnover rates, and are 12 times more likely to have strong business results.

Acuity can be integrated efficiently and securely with existing systems and data. It can also be tailored based on a client's specific needs, improving agent attrition rates and attendance scores and delivering real bottom-line benefits.

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# **Our Industries**

**KM<sup>2</sup>Solutions**



## CORE SERVICES

- Customer Acquisition
- Verifications
- Originations
- Loan Processing
- Customer Care
- Receivables Management
- Technical Support



## Why KM² Solutions?

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# INDUSTRY EXPERIENCE: AUTO FINANCE

KM² Solutions offers a full suite of services catered to the Auto Finance Industry that help clients dramatically improve all points along the customer lending cycle. Our toolkit allows clients to outsource key functions across their entire portfolio. This drives value to their bottom line while ensuring accuracy, security, and best-in-class experiences for the customer. This solution is relied upon by some of the largest Auto Finance lenders in the industry.

## Auto Finance Features:

- We manage every touchpoint across the customer lifecycle, including Loan Verification, Processing, Customer Care, and Accounts Receivable Management.
- When all these processes are managed by a trusted partner, clients' time can be better spent focusing on their core business.
- KM²'s pricing is over 50% lower than the typical domestic contact center cost.
- We consistently outperform in all key metrics across the board, ensuring customer satisfaction.
- Our proven acquisition strategies and data-driven retention models maximize potential revenue opportunities at every interaction.
- Our flexible technology platform allows seamless integration with any client system.
- All of our contact center locations are in regions with extensive service sectors, which allows for multilingual, high-quality collections practices, even when curing highly delinquent accounts.

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## CORE SERVICES

- Customer Care
- Customer Acquisition
- Customer Retention
- Help Desk/Troubleshooting
- Technical Support
- ID & Password Reset
- Activation Support
- Upsell & Cross-Selling
- Billing & Payment Inquiries
- Issue Resolution
- Third-Party Verification
- Social Media Management
- Content Moderation
- Account Management



## Why KM² Solutions?

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# INDUSTRY EXPERIENCE: COMMUNICATIONS & MEDIA

KM² Solutions offers innovative outsourcing solutions for the communications and media industry, which help drive efficiencies, reduce costs, and improve performance. In an increasingly transformative landscape, access to cutting-edge technologies and innovative solutions is critical to delivering enhanced customer experiences and maintaining a competitive advantage.

KM² leverages two decades of experience across all major verticals and the latest in AI-driven advanced technologies to ensure superior, insight-based service to its clients and their customers. With a broad geographic footprint and multilingual capabilities, KM² can also meet market growth needs while offering the best in business continuity and redundancy.

## Key Advantages:



### Customer Satisfaction & Retention

From Customer Care to Technical Support, KM² agents excel at Level 1 Tech Support, upsell, cross-sell, retention, and issue resolution.



### Technology & Innovation:

KM² is at the forefront of employing best-in-class technologies like AI, data analytics, and automation to improve service delivery and reduce human error, resulting in smoother and higher-value customer interactions.



### Performance & Optimization:

We achieve and maintain operational efficiency through optimal workforce management. Ensuring that the correct number of agents with the right skill sets are staffed at the right time allows us to meet our clients' demands while maintaining operational efficiency.

For more information, please contact the Sales Team:



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## SUCCESS METRICS

- First Call Resolution
- Average Handle Time
- Items Per Purchase
- Customer Satisfaction Score
- Call Abandonment Rate
- Customer Loyalty
- Net Promoter Score
- Compliance Rate
- Order Accuracy Rate
- Order Fulfillment Time
- Revenue Per Call



## Why KM² Solutions?

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# INDUSTRY EXPERIENCE: CONSUMER PACKAGED GOODS

In the fast-paced Consumer Packaged Goods (CPG) sector, efficiency, cost management, and customer satisfaction are critical for success. KM² Solutions can significantly bolster a CPG company's operations, presenting an attractive avenue for enhanced competitiveness and growth by offering a blend of operational efficiency, cost management, and strategic advantages.

Here are some of the key advantages of partnering with KM² Solutions for your CPG outsourcing needs:

### **Cost Reduction:**

Outsourcing non-core tasks to KM² can lead to substantial cost savings on labor, infrastructure, and operational overheads.

### **Operational Efficiency:**

KM² has specialized knowledge and tools that can streamline business processes, ensuring tasks are completed quickly and accurately.

### **Technology Adoption:**

KM² is at the forefront of employing modern technologies like AI, data analytics, and automation.

### **Enhanced Customer Experience:**

KM² can significantly enhance the customer experience by providing high-quality, round-the-clock support.

### **Increased Sales:**

KM² agents are adept at cross-selling and up-selling ensuring maximum revenue per transaction while reducing abandon rate and improving customer loyalty.

For more information, please contact the Sales Team:

 (262) 385-0955  
 [salesteam@km2solutions.com](mailto:salesteam@km2solutions.com)



## CORE SERVICES

- On-Peak/Off-Peak Support
- Flexible Staff Scheduling
- Rapid Scale-Up/Scale-Down Capability
- 24/7/365 Customer Care
- Receivable Management, Billing, Collections
- Self-Service Capabilities
- Omnichannel Routing
- 12 Nearshore Locations
- Bilingual/Multilingual Support



## Why KM² Solutions?

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# INDUSTRY EXPERIENCE: ENERGY & UTILITIES

KM² Solutions delivers reliable, scalable outsourcing services for the Energy and utilities sector. These services help drive operational efficiency while reducing costs and enhancing customer service for our clients and their customers.

KM² has over 20 years of experience providing award-winning contact center and back-office services such as customer care, billing, collections, reporting, retention, sales, and support for Fortune 500 companies.

KM² can help energy and utility providers optimize efficiencies while meeting all regulatory requirements through cutting-edge PCI-compliant technology and exceptional human resource capabilities.

## KM² Solutions Provides:



### Top Technology:

We leverage key technologies such as Self-Service, Automation Technologies, and Artificial Intelligence (AI) to streamline business processes, drive better performance, and improve the overall customer experience.



### Bilingual Support:

With over 12% of the U.S. population speaking Spanish at home, and that number growing, KM² specializes in high-level Bilingual Support and can meet this increasing demand across its full range of products and services.



### Security & Compliance:

As a trusted partner, KM² Solutions adheres to strict regulatory compliance protocols to ensure our outsourcing services for energy companies are always protected.

For more information, please contact the Sales Team:



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### CORE SERVICES

- Accounts Receivable Management
- Customer Acquisition
- Customer Sales
- Customer Care
- Customer Retention
- Product Support
- Third Party Verification
- Payment Services
- Appointment Setting
- Back Office



### Why KM² Solutions?

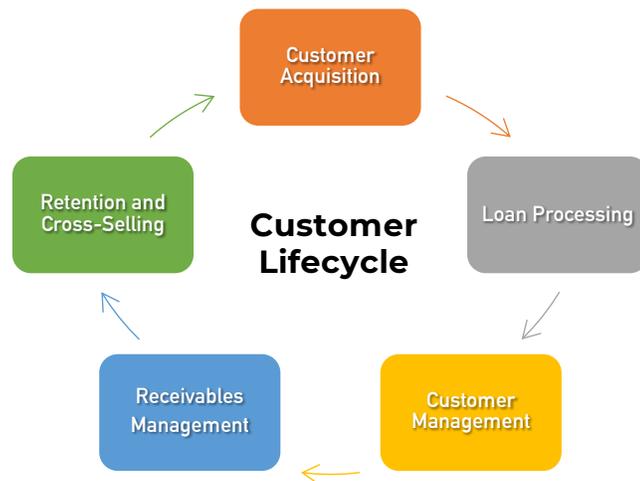
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## INDUSTRY EXPERIENCE: FINANCIAL SERVICES

KM² Solutions diligently works with its partners to provide cost-effective, custom-tailored solutions, maximizing efforts to achieve desirable results. We help our clients acquire new customers, optimize the way they support existing customers, and prevent their customers from slipping into delinquency. Our financial services include everything from telesales, loan origination, retention, care, and support through first-party collections and recovery.

KM² offers clients a full suite of solutions with end-to-end care and support. We handle everything with the quality and dedication you would expect from an award-winning industry leader.

We deliver high-quality, multilingual services from best-in-class locations at half the cost of a US-based provider. We outperform in all key metrics, including First-call Resolution, Customer Retention Rates, Agent Response Time, and Agent Efficiency.



For more information, please contact the Sales Team:

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 [salesteam@km2solutions.com](mailto:salesteam@km2solutions.com)



## CORE SERVICES

- Customer Care
- Remote Care & Monitoring
- Emergency Care Triage
- Activations
- Claims Management
- Insurance Verification
- Patient Scheduling
- Appointment Setting
- Reminders
- Billing/Account Management
- Collections
- New Member Acquisition
- Lead Generation/Enrollment
- Surveys



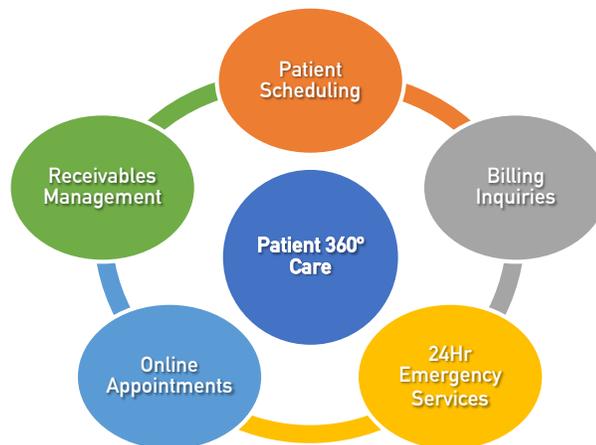
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# INDUSTRY EXPERIENCE: HEALTHCARE SOLUTIONS

KM² Solutions provides best-in-class, cost-effective solutions for all your healthcare outsourcing needs. We enhance the client/patient experience and resolve issues in a friendly and timely manner.

From government organizations and major employers to healthcare providers, pharmacies, and manufacturers, we work to meet your needs. We are HIPAA Compliant and adhere to the highest standards within the industry's regulatory framework.



KM² has deep expertise in inbound & outbound healthcare solutions. We support:

- Daily, weekly, and seasonal volume management.
- Easy to staff, scalable solutions.
- Direct access to international teams.
- Bilingual staffing for Spanish language support.
- Increased sales, average order value, and bundled services.
- Emphasis on patient satisfaction and return visitors, increasing the lifetime value of each customer.

We outperform in all key metrics, including first-call resolution, patient retention rates, agent response time, and agent efficiency.

For more information, please contact the Sales Team:

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 [salesteam@km2solutions.com](mailto:salesteam@km2solutions.com)



## CORE SERVICES

- Customer Care
- Sales
- Appointment Scheduling & Reminders
- Repair Triage
- Technical Support
- Help Desk and General Inquiries
- Emergency Service
- Warranty Sales & Support
- Repair & Replacement
- Claims Management



## Why KM² Solutions?

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# INDUSTRY EXPERIENCE: HOME SERVICES

KM² Solutions has expertise in outsourcing for Home Services companies and supports some of the leading U.S. home services brands. Our flexible solutions can meet the need for seasonal ramps, and our omnichannel delivery means we can reach your customers at any touchpoint of their choosing. KM² addresses the challenges facing the home services industry at less cost and with better performance.

## Common Challenges:

- Building brand loyalty
- Timely follow-through on administrative functions
- Omnichannel delivery for communicating with prospects and customers - Voice, Live Chat, Email, Social Media
- Knowledgeable agents with superior communication skills
- Capacity and scalability to ramp up staff during peak hours/seasons.
- Scheduling follow-up to reduce late or missed appointments.

KM² Solutions leverages top technology to streamline business processes, drive better performance, and improve the overall customer experience. We offer Bilingual Support and adhere to strict regulatory compliance protocols to ensure our outsourcing services and clients are always protected.

## Services Supported:

- Home Security
- Home Automation, IOT
- HVAC, Electrical & Plumbing
- Cleaning Services
- Salon & Beauty Services
- Moving & Storage
- Major Appliances
- Pest Control
- Landscaping
- Windows
- Flooring
- Painting & Decorating
- Shades & Blinds
- Roofing

For more information, please contact the Sales Team:

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### 'TIER ONE' SERVICES

- Customer Care
- General Inquiries
- FNOL
- Catastrophe Support
- Claims Management
- Policy Management
- Commission Management
- Access Issues
- Billing Inquiries
- Credits/Refunds
- Select Policy Changes
- Pay Plan Changes
- Other Back-Office Support



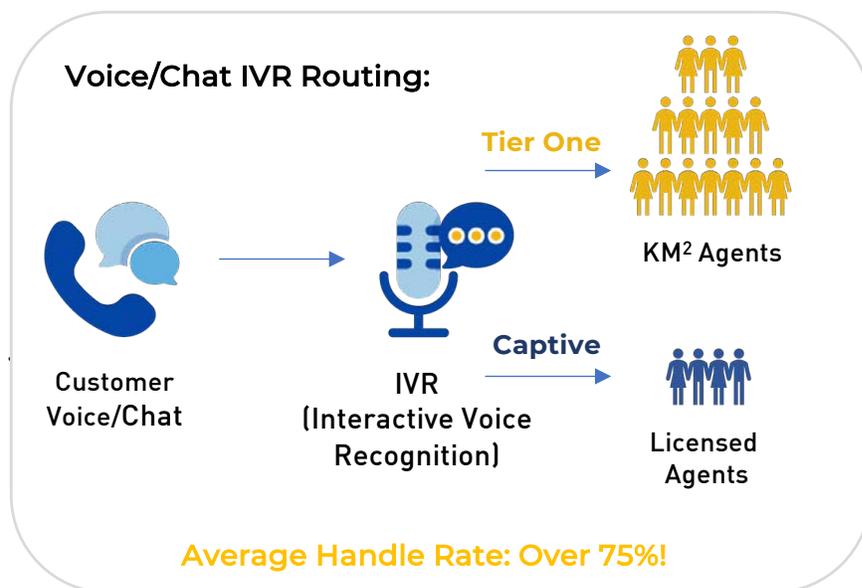
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## INDUSTRY EXPERIENCE: INSURANCE

KM² Solutions provides best-in-class outsourcing services for some of the biggest names in the U.S. insurance industry. Whether it be policy management, managing claims, or bundling services, insurance companies require a personal touch at every interaction to enhance customer experience and drive brand loyalty.

KM² can manage all 'Tier One', In-Scope Bilingual Voice and Chat transactions. Automatically filtered through Interactive Voice Response (IVR), all Out-of-Scope requests transfer directly to an internal licensed rep or local insurance agent. On average, more than 75% of all incoming Voice and Chat transactions fall In-Scope and can be handled directly by KM² agents.



KM² manage complex tasks while driving performance, cutting costs, and improving customer service standards so clients can focus solely on regulatory or state-specific tasks that require licensed agent interaction.

For more information, please contact the Sales Team:

(262) 790-2656  
salesteam@km2solutions.com



## CORE SERVICES

- Customer Support
  - Lead Qualification and Management
  - Appointment Setting and Calendar Management
- Property Management
  - Tenant and Resident Support
  - Assistance
  - After-Sales Support
  - Multilingual Support
  - Concierge Services
- Marketing and Sales Support
  - Survey and Feedback Collection



## Why KM² Solutions?

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# INDUSTRY EXPERIENCE: REAL ESTATE

KM² Solutions offers a comprehensive suite of services tailored specifically for Real Estate companies. These services cover all aspects of client interaction, from support to management, ensuring a seamless and efficient customer experience.

## CORE SERVICES INCLUDE:



### Customer Support

KM² handles inquiries about property listings, availability, pricing, and more. KM² can assist with lead qualification, managing the sales funnel, and setting up appointments for property viewings, open houses, and other meetings, ensuring seamless scheduling and communication between clients and agents.



### Property Management

KM² handles tenant and resident support, including addressing queries, processing maintenance requests, and coordinating services. After-sales support can assist with ongoing needs such as document processing and lease management. Additionally, multilingual support capabilities allow companies to cater to a diverse clientele.



### Marketing & Sales Support

KM² contributes to marketing and sales by supporting email campaigns, conducting follow-ups, and collecting valuable data and feedback through electronic surveys.

By partnering with KM² Solutions, Real Estate companies can concentrate on their core business activities, knowing that their clients receive responsive and comprehensive support. This strategic outsourcing allows you to maximize your resources and focus on what you do best.

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## CORE SERVICES

- Retail Banking Deposits (Savings, Checking, Prepaid)
- Credit/Debit Card Services
- Lending (Auto, Home Equity, Secured Installment)
- Mobile Banking
- Money Transfer Products
- Digital Wallet & P2P Payment Support
- Fintech Customer Support (Neo-banks, Embedded Finance Apps)
- Customer Onboarding
- Fraud Management
- Cross-Sell / Up-Sell
- Technical Support
- Small Business Support
- Wealth Management
- Collections (First-Party)
- Dispute Resolution
- Back-Office Processing
- Loan Origination & Administration
- Account Maintenance & Verifications
- Compliance and KYC Screening

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# INDUSTRY EXPERIENCE: RETAIL BANKING

KM² Solutions supports leading financial institutions and cutting-edge FinTechs with tailored, high-impact solutions across the evolving banking spectrum. From account opening to collections, we optimize every customer touchpoint with care, compliance, and performance. Our banking experience spans technical support, fraud prevention, mobile banking assistance, and end-to-end loan services.

We partner with our clients to enhance customer satisfaction, improve operational efficiency, and reduce costs through multilingual support from nearshore locations. With proven success in managing sensitive transactions and regulatory processes, KM² is your trusted partner in delivering a seamless and secure banking experience.

## Customer Lifecycle Expertise

Our teams are trained to manage complex customer interactions and regulatory standards with accuracy and empathy. From digital onboarding and mobile deposits to card issuance and dispute processing, KM² ensures your customers receive world-class service every step of the way.



For more information, please contact the Sales Team:

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### CORE SERVICES

- Customer Service Support
- Sales Support and Real-Time Sales Guidance
- Order Enquiry, Taking and Processing
- Order Tracking and Status Enquiry
- Product Returns
- Product Exchanges
- Complaint Management
- Payment/ Billing Support



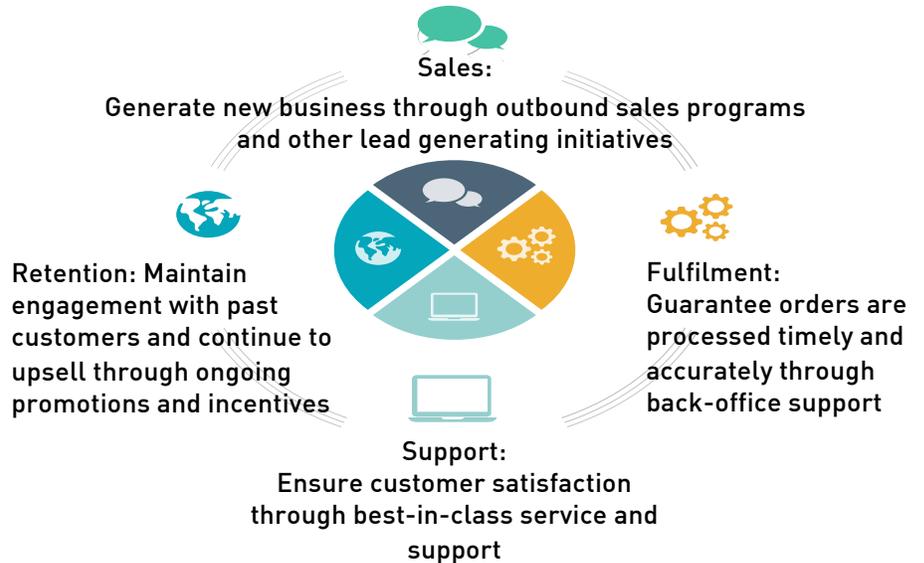
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## INDUSTRY EXPERIENCE: RETAIL & ECOMMERCE

KM² Solutions strives to deliver a seamless shopper experience, helping our retail and eCommerce clients make the most of every relationship across whichever channels are most relevant to the client’s customers. Our Retail and eCommerce service experts have extensive experience meeting and exceeding key metrics for inquiries related to customer service, direct response, technical support, catalog orders, and eCommerce. Our proven track record includes increasing average order value, conversion rates, and, most importantly, customer satisfaction.

- 100% increase in Retail/E-commerce seasonal staffing flexibility.
- Cost-effective, high-quality services delivered from best-in-class locations.
- Accent-neutral bilingual support.
- We outperform in all key metrics, including AHT, calls per hour, hold time, wrap-up time, NPS, and service level metrics.



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## CORE SERVICES

- Help Desk Support
- IT & Tech Support
- Customer Care
- Sales & Retention
- Back Office
- Content Moderation
- Dispute Resolution
- Data Collection
- Data Evaluation



## Why KM² Solutions?

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## INDUSTRY EXPERIENCE: TECHNOLOGY

KM² Solutions partners with Technology companies in both consumer and enterprise domains, providing significant cost and operational efficiencies while delivering innovative solutions to meet the evolving needs of the Technology sector. Here are some key advantages of partnering with KM² Solutions for your Technology outsourcing needs.

- **Service & Performance:** Our highly skilled agents can be trained to perform specialized technology functions that lead to higher-quality outcomes.
- **Operational Efficiency:** By streamlining processes and adopting best practices leveraged across our broad vertical experience, we can optimize workflows, reduce redundancies, and eliminate inefficiencies.
- **Expertise:** KM² has access to a pool of highly specialized talent, allowing technology companies to leverage skills and knowledge that may not be available elsewhere.
- **Scalability & Flexibility:** We have the agility to allow our clients to quickly scale their operations up or down without the associated logistical and financial burdens.
- **AI, Innovation & Continuous Improvement:** KM² is at the forefront of employing modern technologies like AI, data analytics, and automation.
- **Market Expansion Support:** Our broad geographic footprint and multilingual support options facilitate easier entry into new markets.
- **Security & Compliance:** KM² adheres to strict standards for data security, privacy, and compliance with international regulations.

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 [salesteam@km2solutions.com](mailto:salesteam@km2solutions.com)



## CORE SERVICES

- Inbound/Outbound
- Customer Care
- Technical Support
- Service-to-Sales
- Sales
- Cross-Sell/Up-Sell
- Product Lines & Bundles
- Retention Desk
- Accounts Receivable
- Billing



## Why KM² Solutions?

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# INDUSTRY EXPERIENCE: TELECOM

KM² Solutions has deep industry experience in outsourcing for Telecom, Wireless, and broadband providers. We offer skilled human resources and harness cutting-edge technology to improve productivity and profitability while delivering an exceptional customer experience.

Our highly trained, well-educated, bilingual agents are skilled at Customer Care, Sales, Support, and Back-Office services and possess a strong affinity for Tech and North American user habits. We align with your company's culture and provide customized solutions to meet your needs.

### KM² Advantages for Telecoms:

- Innovative tools, products, and services
- Excellent risk mitigation and business continuity
- Flexible scheduling, rapid scalability, and workforce optimization
- Best-in-class technology and robust network infrastructure
- Colocation facilities in Miami, Florida, and Columbus, Ohio
- Full bilingual support

With 12 state-of-the-art contact centers in 6 nearshore countries, KM² offers telecom companies the desired flexibility and scalability while maximizing redundancy and business continuity in a fully regulated environment.

For more information, please contact the Sales Team:

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 [salesteam@km2solutions.com](mailto:salesteam@km2solutions.com)



## CORE SERVICES

- Customer Acquisition
- Customer Retention
- Customer Attrition
- Sales and Marketing
- Reservations
- Loyalty Management
- Guest Profiling and Segmentation
- Cross-Selling
- Upselling
- Financial Analytics and Reporting



## Why KM² Solutions?

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# INDUSTRY EXPERIENCE: TRAVEL & HOSPITALITY

KM² Solutions is an industry leader in helping travel, leisure, and logistics firms achieve operational efficiency and best-in-class customer service. Through operational expertise and key technologies, our tailored suite of outsourcing solutions can complement any hospitality operation and ensure long-lasting customer experiences. We aim to ensure client success by building strong customer loyalty and engagement programs while enhancing the customer experience.

- Operate in locations with strong travel & hospitality sectors and agents with deep industry experience.
- Operational efficiency and an increase in customer satisfaction and loyalty.
- Cost-effective, high-quality Travel & Hospitality services delivered from best-in-class multilingual locations.
- Dealing with a Mix of Users – Frequent Business Travelers and the Infrequent Traveler. Flexibility to handle differing needs.
- We outperform in all key metrics, including First-call Resolution, Customer Retention Rates, Agent Response Time, and Agent Efficiency.

## GUEST RELATIONS



For more information, please contact the Sales Team:

 (262) 385-0955  
 [salesteam@km2solutions.com](mailto:salesteam@km2solutions.com)

# **Our Operations**

**KM<sup>2</sup> Solutions**



# COMPLIANCE

## FUNDAMENTALS

- Employee Training
- Strict Access Policies
- Proximity Card-Based Access Control System
- Video Surveillance
- Secure Connections
- Disabled Ports
- Internet Access Restricted
- Clean Desk Policy

## CMS GOALS

- Policies and Procedures
- Training
- Monitoring
- Consumer Complaint Response

At KM<sup>2</sup> Solutions, we pride ourselves on maintaining the highest standard of integrity in serving our clients. We perform with strict adherence to our clients' guiding principles and values.

We take extra care to protect each of our clients' reputations and brands. Regular monitoring and audits are conducted to ensure compliance with all industry acts and standards, including FDCPA, HIPAA, TCPA, FCRA, TCFAPA, and PCI DSS.

### The Five Functions of our Compliance Department:

- 1) Identification:** Identify the risks that an organization faces and advise on them.
- 2) Prevention:** To design and implement controls to protect an organization from those risks.
- 3) Monitoring and Detection:** To monitor and report on the effectiveness of those controls in the management of an organization's exposure to risks.
- 4) Resolution:** To resolve compliance difficulties as they occur.
- 5) Advisory:** To advise the business on rules and controls.

### Compliance Management System (CMS):

An effective CMS is commonly comprised of three interdependent elements.



For successful management of compliance responsibilities and risks

## Why KM<sup>2</sup> Solutions?

KM<sup>2</sup> Solutions is an award-winning BPO with over two decades of experience operating an exclusively nearshore strategy throughout the Caribbean and Latin America. The company provides clients with a host of outsourcing solutions, including customer care, receivables management, technical support, sales & marketing, data analytics, and back-office processing. KM<sup>2</sup> Solutions maintains PCI DSS compliance, completes an annual SOC 2 audit, and has a Compliance Management System that aligns with the FDIC.

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# HR-DRIVEN EMPLOYEE ENGAGEMENT TOOLS

## KEY ADVANTAGES

- Voice of the Employee Channels (Surveys, Round Tables)
- Real-Time Feedback Loop via KM² Connect
- Structured Performance Reviews
- Individualized Coaching via Acuity
- Escalation Access to HR Leadership
- Suggestion & Innovation Capture Tools

## SUCCESS METRICS

- Improved Agent Retention
- Higher ESAT Scores
- Increased Coaching Effectiveness
- Reduced Escalations
- Enhanced Client Outcomes



KM² Connect

## Why KM² Solutions?

KM² Solutions (KM2 Solutions) operates contact centers throughout the Caribbean and Latin America. The company provides clients with a host of different solutions, including customer care, receivables management, technical support, sales and marketing, data analytics, and back-office processing. KM² Solutions maintains PCI DSS compliance, completes a SOC 2 audit annually, and has a Compliance Management System that meets the FDIC standards.

At KM² Solutions, we believe that engaged employees are the cornerstone of exceptional service delivery. That's why we've built a suite of HR-driven tools designed to promote open communication, continuous feedback, and performance growth across all levels of our organization.

### Open Dialogue & Continuous Feedback

- Round Table Meetings: Regular sessions that give employees a voice on workplace issues and opportunities.
- Annual Employee Survey: Gathers actionable insights on engagement, leadership, and satisfaction.

### KM² Connect: Unified Employee Experience Platform

- Suggestion Box: A platform-wide channel for sharing ideas and raising concerns.
- Ask HR: Direct line to Local HR for support or escalation to Corporate HR as needed.

### Transparent Evaluation & Coaching

- Annual Performance Evaluations: Structured appraisals conducted within our HRM system to ensure fairness, growth, and goal alignment.

### Performance Optimization Platform (Acuity)

- Delivers daily and monthly coaching for agents, Team Leads, Supervisors, and Program Managers.
- Manages structured performance improvement plans (PIPs) and reinforces accountability through regular reviews.

By empowering employees with transparent communication tools, consistent performance feedback, and active listening mechanisms, KM² strengthens its culture of trust, accountability, and high performance.

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# ONBOARDING & IMPLEMENTATION

## BENEFITS

- Reliable Technology
- Integrated Systems
- Enhanced Scalability
- Accurate Reporting
- Effective Training
- Faster Ramp Time
- Business-Wide Continuity
- Customized Solutions
- Strong Client Relationship

## THE KM² ADVANTAGE

### WHY IS IT IMPORTANT?

First impressions count. Designing and implementing a successful onboarding process streamlines time consuming tasks and ensures complete readiness and total satisfaction from day one.

### Why KM² Solutions?

KM² Solutions is an award-winning BPO with over two decades of experience operating an exclusively nearshore strategy throughout the Caribbean and Latin America. The company provides clients with a host of outsourcing solutions, including customer care, receivables management, technical support, sales & marketing, data analytics, and back-office processing. KM² Solutions maintains PCI DSS compliance, completes an annual SOC 2 audit, and has a Compliance Management System that aligns with the FDIC.

KM² Solutions values creating strong client relationships from the very beginning. Our onboarding process is designed to seamlessly integrate a client's systems with our own and quickly ready the project for operation. Furthermore, this process identifies key contacts within both organizations and establishes a communication dynamic going forward. We tailor all specifications and requirements to meet the unique needs of each project.

### The onboarding process consists of a 3-phase plan:

- 1) **Contract Execution:** The initial scope of work has been clearly defined in the MSA and SOW and approved by all parties involved.
- 2) **Identifying Key Leaders:** The internal project team has been identified, and their roles and responsibilities have been assigned and communicated.
- 3) **Project Implementation Plan:** The hardware, technology, supporting documents, and processes are assigned to both KM² and our client's team to ensure project success. This 5-step method includes:
  - **HR & Recruiting:** Defining the hiring plan, job descriptions, schedules, and due dates.
  - **Training:** Timeline, training material, staffing.
  - **Testing:** IT planning, configuration and testing, operational, and system testing.
  - **Reporting and Billing:** Production reports, custom reports, define invoicing methods, and frequencies.
  - **Go Live:** Account creations, training class, and production floor readiness, ongoing support, and project closure.

Depending on the project, the client onboarding process may take up to 45 calendar days.

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# PERFORMANCE MANAGEMENT

## PM TOOLS

- Call Recordings
- Live Monitoring
- Quality Worksheets
- Coaching Sessions
- Skill Testing
- 360 Degree Feedback

## PM KEY GOALS

- Maintain Accurate Reporting
- Identify Performance Outliers
- Determine Root Cause of Performance Outliers
- Effective Skill Training
- Eliminate Critical Errors
- Achieve Optimal Performance

KM<sup>2</sup> Solutions' goal is to deliver complete customer satisfaction with every interaction. We constantly evaluate our agents' performance to ensure we successfully meet the needs of each individual client. Performance Management is key for maintaining high levels of customer experience by aligning employees, resources, and systems to meet business goals.

Client satisfaction is our benchmark for success. By understanding a client's needs, goals, and expectations, we can provide the right people in the right position with the right skills and the best technology. Plus, in sharing best practices, we improve performance and productivity, which is essential for the success of the project.

### Issue Resolution Process

Performance Management ultimately begins by hiring the right people, but when issues arise, it is critical to identify and repair them with a measured response. Once potential issues have been identified, steps must be taken to minimize their impact on the project.

|          |  |
|----------|--|
| Analyze  | •Ongoing analysis of all KPIs and individual performance against team            |
| Identify | •Identify and confirm performance issues and accountable individuals             |
| Coach    | •Develop performance enhancement plans and coach to specific skills              |
| Review   | •Test for skill comprehension and monitor individual for performance improvement |

KM<sup>2</sup> Solutions' strategies focus on people, strict management disciplines, and excellence in operations, enabling everyone to achieve solid overall performance and exceed expectations.

## Why KM<sup>2</sup> Solutions?

KM<sup>2</sup> Solutions is an award-winning BPO with over two decades of experience operating an exclusively nearshore strategy throughout the Caribbean and Latin America. The company provides clients with a host of outsourcing solutions, including customer care, receivables management, technical support, sales & marketing, data analytics, and back-office processing. KM<sup>2</sup> Solutions maintains PCI DSS compliance, completes an annual SOC 2 audit, and has a Compliance Management System that aligns with the FDIC.

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# QUALITY ASSURANCE

## QA SCORECARD

- Agent Satisfaction (ASAT)
- Agent Greeting
- Address the Customer
- Establishing Rapport
- Customer Satisfaction (CSAT)
- Professional Tone
- Clear Dialect
- First Call Resolution (FCR)
- Displays Empathy
- Negotiation Skills
- Net Promote Score (NPS)
- Service Level
- Speed of Answer
- Average Handle Time (AHT)

## THE KM² ADVANTAGE

### WHY IS IT IMPORTANT?

QA ensures that agents provide quality service in line with organizational objectives.

Optimized quality assurance enhances the quality of service to customers and improves close rates.

### Why KM² Solutions?

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The KM² Solutions Quality Assurance model is instrumental in improving, maintaining, and exceeding the overall customer experience by effectively managing the project's service deliverables. Our QA experts excel in key areas such as compliance, process, and customer satisfaction, enabling us to meet both our clients and the organization's objectives.

Using a scorecard-based observation and evaluation process, the QA team works in conjunction with Operations, Training, and HR to identify strengths and opportunities to ensure KPI's are not just met but continually improved upon. The department plays a vital role in maintaining customer and client satisfaction.

### KM² Quality Model

- **Observe:** A minimum of one observation per agent per week is achieved by looking for appropriate behaviors and skills.
- **Educate:** Target agent's self-discovery, understanding, and commitment to improving on identified areas.
- **Follow-Up:** Is the agent displaying desired behaviors? If not, go back to Educate or move to Performance Management.

Our focus is to develop Agents and maximize their performance by listening and providing feedback.

### Tactics include:

- One-on-one sessions with Agents
- Peer review and calibration sessions with Supervisors and Managers
- Devise and execute action and performance improvement plans
- Supervisors and Managers are kept abreast with all actions between Performance Management (PM) and Agent(s), and in turn, the Supervisors offer the same courtesies

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# RECRUITMENT STRATEGY

## RECRUITMENT GOALS

- Attract high-quality talent
- Hire candidates looking to grow and stay with the company
- Hire candidates that best-match the profile
- Optimize recruiting investment
- Streamline the onboarding process

## KEY SKILLS

- Dependability
- Empathy
- Customer service
- Negotiation
- Problem-solving
- Ability to understand and follow instructions
- Ability to focus on goals
- Strong work ethic
- Communication
- Positive attitude

Our goal at KM² is to hire the right people with the right skills. We invest heavily in sourcing the best talent possible. Our recruitment strategy is a holistic process that begins with establishing the correct selection criteria, followed by assessments, job interviews, and reference checks.

## KM² RECRUITMENT FUNNEL:

- **Sourcing/Lead Generation:** We use many different channels to communicate our message as we recruit. These sources include radio, newspapers, social media, job fairs, and employee referral programs.
- **Job Application Completion:** Once a candidate becomes interested, they can apply directly online. The application is delivered directly to the Human Resources teams for review. Alternatively, they can apply at job fairs or by walking into the office.
- **Screening:** At this stage, we review candidates based on hiring needs. We analyze their English language proficiency by measuring their grammar, reading, and listening skills. We also assess computer literacy. The final criterion of this process is assessing personality strengths.
- **On-Boarding:** After a candidate has been selected, they undergo an extensive compliance and orientation process before training begins.

## Why KM² Solutions?

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# RETENTION STRATEGY

## RETENTION GOALS

- Employee Satisfaction
- Achievement Recognition
- A Sense of Purpose
- Brand Ambassadors
- Quality Performance
- Incentive Programs
- Professional Growth
- Career Pathing
- Work-Life Balance

## THE KM² ADVANTAGE

### WHY IS IT IMPORTANT?

The average cost of replacing an employee is estimated between 150-250% of the employee's annual salary.

A tenured employee has the experience to build a stronger relationship between the consumer and the brand.

### Why KM² Solutions?

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At KM² Solutions, we invest in our people's well-being, professional development, and career advancement. The genuine care we give to employees translates into people staying with us longer.

KM² is committed to creating a positive and rewarding work environment that encourages open communication, mutual respect, and teamwork while recognizing hard work, effort, and dedication.

Every member of our team enjoys great benefits and perks. At each site, we offer comprehensive insurance assistance for medical and life. We also provide on-site clinics and childcare services, local discount programs, health and wellness programs, on-site cafeterias, and various recreational activities.

KM² offers learning and development opportunities that expand our employees' knowledge base and skill set through our Leadership Development Program. We also promote career advancement based on individual strengths. The ability to move up the organizational ladder makes KM² more than just a stopping point in our employees' career paths.



KM² Cares, our corporate social responsibility arm, furthers our commitment to our employees and communities at large. This commitment is also expressed in the company's core values, beliefs, and behaviors. The company's commitment to excellence is reflected not only in its operations but also in its employees and the communities we serve.

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# TRAINING

## TRAINING SKILLS

- Express Empathy
- Overcoming Objections
- Build Rapport
- Problem-Solving Skills
- Collection Rebuttals
- De-Escalation Skills
- Call handling Techniques

## THE KM² ADVANTAGE

### WHY IS IT IMPORTANT?

Effective training is vital in ensuring we deliver the best possible customer experience.

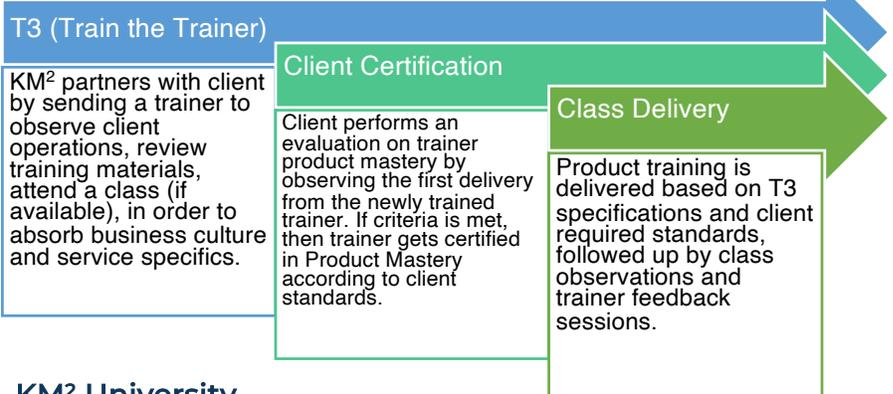
Our emphasis on continued education keeps our agents motivated and engaged while allowing for growth opportunities within the organization.

### Why KM² Solutions?

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KM² Solutions believes that great performance comes from building a great team. We take time to develop high-performing individuals, setting the stage for client success. Training starts with a full day of orientation, touring the site, and reviewing company policies and procedures. For the next 2 weeks, Product Knowledge and Systems training is undertaken, during which call scenarios are created that mimic the ones in production. During this phase, a specific agenda is followed where both the company and the client evaluate all training topics. Once the trainee successfully passes a rigorous graduation exam, the trainer transitions with the trainee to the production floor. Follow-up is provided at the end of each program. 30-day and 60-day evaluations are undertaken to ensure a proper transition has been completed.

### Knowledge Transfer Process



### KM² University

Continuous learning is essential for keeping agents up-to-date with the latest skills and preparing them for managerial duties. KM² University is an online portal of education modules that supports employees in improving their skills in various leadership disciplines, from management to operations and people development.

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# WORKFORCE MANAGEMENT

## KEY CAPABILITIES

- Forecasting
- Capacity Planning
- Staff Scheduling
- Activity Management
- Attendance and Adherence
- Real-time Management
- Performance Tracking

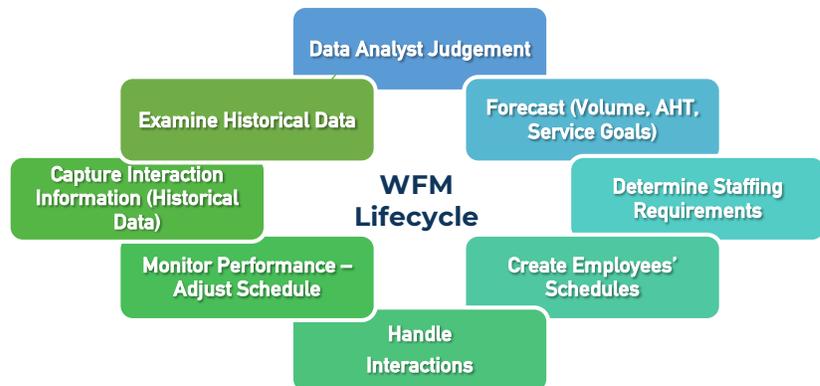
## WFM KEY GOALS

- Achieve optimal performance
- Higher productivity
- Consistent customer experiences
- Reduce operational costs
- Greater insight into KPIs.
- Easier reporting and analysis
- Consistent customer experiences

KM<sup>2</sup> Solutions achieves and maintains operational efficiency through optimal workforce management. Customers and staff are at the center of everything we do. Ensuring that the right number of agents with the right skill sets are staffed at the right time allows us to meet our clients' demands while maintaining operational efficiency for any business industry.

Our dynamic and reactive WFM model is comprised of three essential elements that make our operational processes more efficient, scalable, and profitable:

- Forecasting** is the backbone of the WFM cycle, which allows us to identify future workloads and anticipate call drivers.
- Scheduling** determines FTE needs and schedules staff according to call volume forecast, achieving workforce and cost efficiencies.
- Real-Time Analysis (RTA)**, managing staff daily, ensuring we have the best possible support during each time interval.



KM<sup>2</sup>'s WFM cycle requires several key steps to fulfill the service levels; these steps include capturing and examining historical data, analysis, forecasting volume, AHT, and service goals, determining staff requirements, creating employee schedules, handling interactions, monitoring performance, and readjusting where needed.

## Why KM<sup>2</sup> Solutions?

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# WORK-FROM-HOME OPERATION

## WFH IMPLEMENTATION

- Secure Client Approval
- Identify Eligible Agents
- Assess Home Workspace
- Assess Network Capabilities
- Configure and Distribute Secure Workstations
- Setup Multifactor Authentication

This solution can typically be implemented in 24-72Hrs depending on the number of agents deployed

## WFH BENEFITS

- Maintained Uptime
- Better Productivity
- Flexible Scheduling
- Schedule Adherence
- Employee Satisfaction

### Why KM² Solutions?

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KM² Solutions can scale services and delivery methods to suit clients' needs. Our Work-From-Home (WFH) model provides flexibility and productivity advantages. KM²'s secure WFH solution is not only a standalone model but can also offer clients operational continuity in times of uncertainty.

### Information Security & Compliance:

- KM² Solutions delivers secure WFH with agents using end-to-end encryption and multifactor authentication on locked-down desktops.
- KM² has a proven track record in mitigating risk. We can satisfy information security, regulatory compliance, and client concerns.
- KM² ensures strict security protocols are met while delivering to the highest CX standards in remote environments.



KM² Solutions has established a strong security culture. We trust in our policies and procedures, trust in our training, and above all, trust in the tenacity of our people. In turn, our clients trust us to deliver secure, cutting-edge solutions for all their outsourcing needs.

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# **Our Locations**

**KM<sup>2</sup>Solutions**



### OTHER FACTS

- KM² Opened: 2007
- Language: English (Official)
- Literacy Rate: ~99%
- Labor Force: ~68%



### Why KM² Solutions?

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## BRIDGETOWN, BARBADOS

**Barbados** is an Eastern Caribbean island, and an independent nation situated approximately 1500 miles Southeast of Miami. KM² Solutions is in its capital and largest city, **Bridgetown**, the country’s commercial center.

A vibrant hub, Bridgetown is an important financial and informatics center and a cruise ship port of call for the region. Barbados, which is natively English speaking, enjoys a literacy level of over 99%. Barbados is a leading tourist destination with many international flights daily and is a quick trip from North America. Barbados maintains modern telecommunications infrastructure with widespread fiber connectivity and redundant international subsea cable links.

### Demographics & General Information

- Population: 283,000
- Land Area: 166.4 mi²
- Monetary Unit: Barbados Dollar (BBD or BD\$)
- Exchange Rate: USD\$1.00 = BDS\$2.00 (Pegged)
- Time Zone: Atlantic Standard Time (AST) GMT-4
- Climate: A tropical climate, with temperatures ranging on average from 76°F to 87°F. December to May is classed as ‘Dry Season’ while June to November is ‘Rainy Season.’

### Infrastructure

- Airports: Grantley Adams International Airport (GAIA)
- Airlines: Major Airlines (US, Canada, UK & Europe)
- Transportation: Taxis, Buses (ZR’s)

*“The places that you’ve always wanted to visit are the places you’ll want to do business!”*

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# BOGOTÁ, COLOMBIA

## OTHER FACTS

- KM² Opened: 2018
- Language: Spanish (Official)
- Literacy Rate: ~95%
- Labor Force: ~65%
- English Fluency: ~15%



**Colombia** is situated in the northwest corner of South America; it shares borders with Panama, Venezuela, Brazil, Ecuador, and Peru and is approximately 1500 miles South of Miami. Colombia's capital is **Bogotá**, the country's political, economic, administrative, and industrial center. The city has a young, educated workforce with an English-neutral accent, a bilingual population, advanced infrastructure, and political and legal stability. Direct flights connect Bogotá to major U.S. hubs including Miami, Atlanta, Houston, and New York.

### Demographics & General Information

- Population: 8.0 million (Greater Metro)
- Land Area: 686 mi<sup>2</sup>
- Elevation: 8,660 ft
- Monetary Unit: Colombian Pesos (COP\$)
- Exchange Rate: \$1 ≈ \$4,000 COP
- Time Zone: Central Standard Time (CST) GMT-5
- Climate: The average temperature is 58°F; the driest months are December, January, July, and August. The warmest month of the year is March.

### INFRASTRUCTURE

- Airports: El Dorado International Airport
- Airlines: All Major Airlines
- Public Transportation: Taxi, TransMilenio Buses

\*Bogotá represents the largest concentration of bilingual talent in Colombia.

*"The places that you've always wanted to visit are the places you'll want to do business!"*

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# SANTO DOMINGO, DOMINICAN REPUBLIC

## OTHER FACTS

- KM² Opened: 2014
- Language: Spanish (Official)
- Literacy Rate: ~95%
- Labor Force: ~65%
- EF EPI English Proficiency: Moderate



The **Dominican Republic** is a country located on the island of Hispaniola. It occupies the eastern five-eighths of the island, which it shares with the nation of Haiti. Approximately 800 miles Southeast of Miami, it is the most visited destination in the Caribbean, has the ninth-largest economy in Latin America, and is the largest economy in the Caribbean. **Santo Domingo** is the capital and largest city with one of the greatest metropolitan areas in the Caribbean by population. It is the country's cultural, financial, political, commercial & industrial center and chief seaport.

### Demographics & General Information

- Population: 3.5 million (Greater Metro)
- Land Area: 40mi<sup>2</sup>
- Monetary Unit: Dominican Peso (DOP or RD\$)
- Exchange Rate: USD\$1.00 ~ RD\$60
- Time Zone: Atlantic Standard Time (AST) GMT-4
- Climate: A tropical rainforest climate in the coastal and lowland areas. The average annual temperature is 77°F.

### Infrastructure

- Airports: Las Américas International Airport, Santo Domingo (AILA)
- Airlines: Major U.S., Caribbean, and Latin American carriers
- Public Transportation: Taxis, Buses, Metro

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## OTHER FACTS

- KM<sup>2</sup> Opened: 2010
- Language: English (Official)
- Literacy Rate: 97.8%
- Labor Force: 71.2%



## Why KM<sup>2</sup> Solutions?

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# ST. GEORGE'S & GRENVILLE, GRENADA

**Grenada** is an island nation in the Caribbean Sea about 1500 miles Southeast of Miami. It is also known as the 'Isle of Spice' because it is the world's second-largest exporter of nutmeg and mace. Grenada's capital, **St. George's**, where KM<sup>2</sup>'s first site is located, is a popular tourist destination and is where the country's international airport is located. It is also home to St. George's University, a private international school. The populace of locals, students, and tourists alike make St. George's a vibrant hub of business and social activity. Grenville, where the second KM<sup>2</sup> office is located, is Grenada's second-largest town and is located along the island's east coast. The town and surrounding parish have a population of about 25,000 residents. It is common for employees to commute between both cities.

## Demographics & General Information

- Population: ~124,000
- Land Area: 133.7 mi<sup>2</sup>
- Monetary Unit: Eastern Caribbean Dollar (XCD or EC\$)
- Exchange Rate: USD\$1.00 = EC\$2.70 (Pegged)
- Time Zone: Atlantic Standard Time (AST) GMT-4
- Climate: The climate is tropical, with an average annual temperature of 80°F. December to May is classed as the 'Dry Season,' while June to November is the 'Rainy Season.'

## Infrastructure

- Airports: Maurice Bishop International Airport (MBIA)
- Airlines: Major U.S., Caribbean, and regional carriers
- Public Transportation: Taxis, Minibuses

*"The places that you've always wanted to visit are the places you'll want to do business!"*

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# SAN PEDRO SULA, HONDURAS

## OTHER FACTS

- KM² Opened: 2011
- Language: Spanish (Official)
- Literacy Rate: ~90%
- Labor Force: ~65%
- English Fluency: High (San Pedro Sula)



Honduras is a Central American country bordered to the West by Guatemala, to the Southwest by El Salvador, to the Southeast by Nicaragua, to the South by the Pacific Ocean, and to the North by the Gulf of Honduras, a large inlet of the Caribbean Sea. Honduras is approximately 850 miles Southwest of Miami. San Pedro Sula is the second-largest city behind the capital of Tegucigalpa. Known as the industrial capital of Honduras, San Pedro Sula is Honduras' industrial and commercial hub and a growing center for nearshore BPO and technology services. An international airport is a short distance away, with regular flights to and from most American cities.

### Demographics & General Information

- Population: ~1.1 million (Greater Metro)
- Land Area: 324.3 mi<sup>2</sup>
- Monetary Unit: Lempira (HNL)
- Exchange Rate: USD\$1.00 ~ L25 HNL
- Time Zone: Central Standard Time (CST) GMT-6
- Climate: The temperature typically varies from 68°F to 92°F throughout the year and is rarely below 63°F or above 98°F.

### Infrastructure

- Airports: Aeropuerto Internacional Ramón Villeda Morales (SAP)
- Airlines: Major U.S. and regional carriers
- Public Transportation: Taxi, Bus.

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## Why KM² Solutions?

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## OTHER FACTS

- KM<sup>2</sup> Opened: 2004
- Language: English (Official), Saint Lucian Creole (Dialect)
- Literacy Rate: ~93%
- Labor Force: ~69%



## Why KM<sup>2</sup> Solutions?

KM<sup>2</sup> Solutions is an award-winning BPO with over two decades of experience operating an exclusively nearshore strategy throughout the Caribbean and Latin America. The company provides clients with a host of outsourcing solutions, including customer care, receivables management, technical support, sales & marketing, data analytics, and back-office processing. KM<sup>2</sup> Solutions maintains PCI DSS compliance, completes an annual SOC 2 audit, and has a Compliance Management System that aligns with the FDIC.

# CASTRIES & GROS ISLET, ST. LUCIA

**Saint Lucia** is an independent island nation in the Eastern Caribbean, approximately 1500 miles Southeast of Miami.

Saint Lucia's capital, **Castries**, houses the seat of government and the head offices of many foreign and local businesses. As the birthplace of two Nobel Prize Laureates, English is Saint Lucia's official language, and the education system is based on British norms, resulting in a literacy rate of over 90%. A relatively short flight from the southern U.S. and aligned with U.S. East Coast business hours, Saint Lucia presents itself as an ideal staging point for nearshore outsourcing.

## Demographics & General Information

- Population: 180,000
- Land Area: 238.2 mi<sup>2</sup>
- Monetary Unit: Eastern Caribbean Dollar (XCD or EC\$)
- Exchange Rate: USD\$1.00 = EC\$2.70 (Pegged)
- Time Zone: Atlantic Standard Time (AST) GMT-4
- Climate: The local climate is tropical, with an average annual temperature of 80°F. December to May is classed as the 'Dry Season,' while June to November is the 'Rainy Season.'

## Infrastructure

- Airports: Hewanorra International Airport (UVF), George F.L. Charles Airport (SLU) – Regional Only
- Airlines: Major Airlines (US, Canada, UK & Europe)
- Public Transportation: Taxis, Minibuses

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# **Case Studies**

**MM<sup>2</sup>Solutions**



## INDUSTRY

- Insurance

## SERVICES

- Bilingual Phone
- Bilingual Chat
- Back-Office Processing

## LOCATION

- Dominican Republic

## KEY ADVANTAGES

- Automatic Call Filter via IVR
- Handle 100% In-Scope Calls
- Conference Out-Of-Scope
- Real-Time Translation
- Personalised Service
- Enhance CX
- Lower Abandon Rate
- Reduced Handle Time by 65%
- Increased Brand Loyalty

# CASE STUDY: ACTIVE TRANSLATION

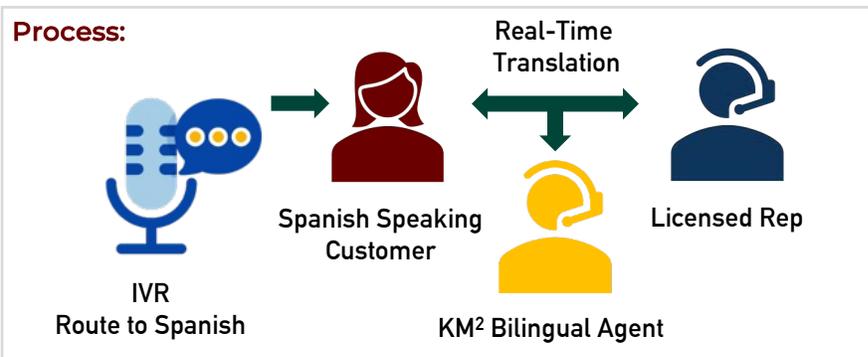
**Summary:** With over 14% of the U.S. population speaking Spanish at home, KM² Solutions can meet the demand for advanced bilingual services. Our bilingual (English/Spanish) agents can be 100% trained on a client's products, processes, and quality standards, allowing them to perform real-time, in-call handling and translation for customer/client calls.

**Story:** One of the top ten U.S. insurance companies relies on KM² for Active Translation Services. Spanish-speaking customers are automatically routed to a bilingual KM² agent via an option on the IVR. For in-scope calls, the customer will be fully handled in Spanish by a KM² agent. For out-of-scope calls, the agent will conference in an internal licensed rep and act as the translator, servicing the customer as a team. This service can reduce average handle time for bilingual transactions by over 65%.

### Active translation for out-of-scope calls:

- Fully verify customer
- Warm conference customer to internal rep
- Shift ownership to internal rep
- KM² agent translates in real-time
- Compliance, payment, and cancellation scripts directly translated into English/Spanish for customers
- KM² agent completes and closes out a call

### Process:



## Why KM² Solutions?

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# CASE STUDY: ACUITY FOR COMPLIANCE

## INDUSTRY

- Insurance

## LOCATIONS

- Dominican Republic

## BENEFIT

Acuity enables compliance managers and support personnel to review and audit customer communications for regulatory, client, internal, and other requirements.

## SERVICES

- Bilingual Phone
- Bilingual Chat
- Back-Office Processing

When Acuity is integrated into client programs, KM<sup>2</sup> can decrease compliance failure points through increased visibility and efficiency.

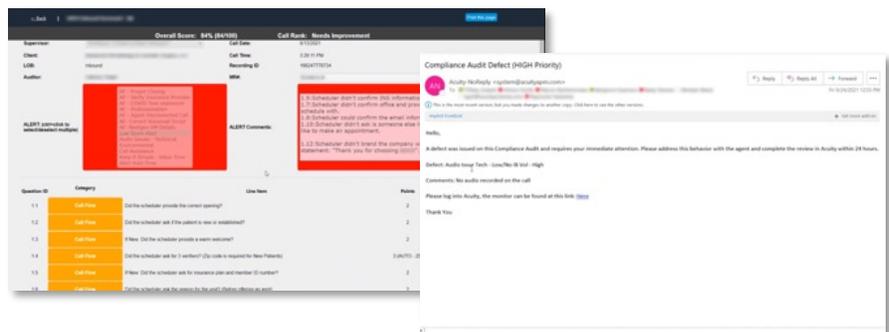
**Summary:** KM<sup>2</sup> Solutions supports one of the top ten U.S. insurance companies over four lines of business and bilingual inbound/outbound voice, chat, and back-office tasks for each.

The implementation of Acuity has enabled compliance managers and support personnel to review and audit agent/customer interactions for regulatory, client, internal, and other requirements. Automated workflows expose compliance gaps and improve coaching and training effectiveness.



### Integrated Alerts:

Integrated alerts and notifications escalate call defects through authorized management channels in real time. Engaging reporting dashboards provide accurate audit status, performance scores, and data visualizations that heighten awareness of key metrics, analytics, and trends.





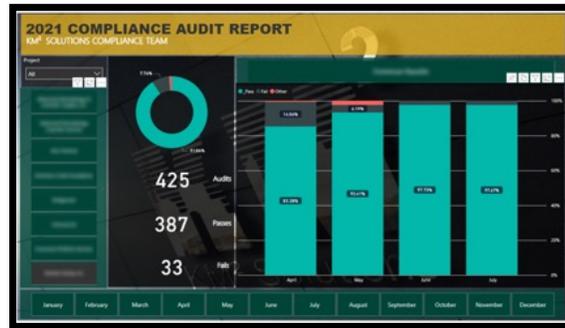
## SUCCESS METRICS

- Minimize Call Avoidance
- Correct Use of Voicemail
- Call Recording Disclosure
- Reduced Excessive Hold
- No Misuse of Systems
- Use Correct Disposition
- RPC Verified
- Reduced Fail Rate

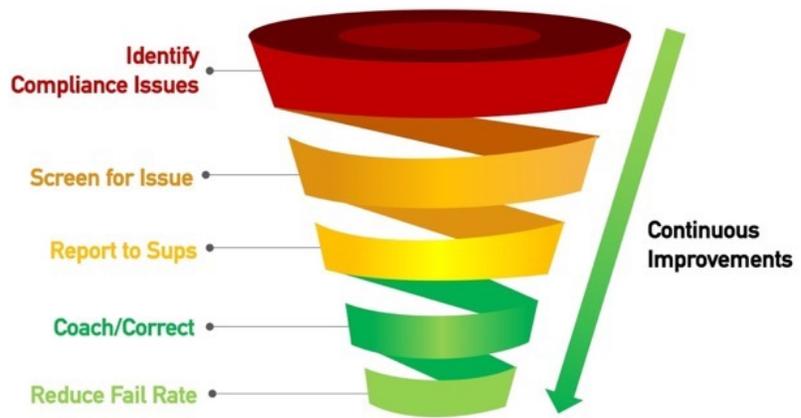


# CASE STUDY: ACUITY FOR COMPLIANCE

Acuity allows us to perform more audits and catch more errors while outputting trending data so operations can monitor and improve performance.



### Compliance Funnel:



Acuity can be integrated efficiently and securely with existing systems and data and can be tailored based on a client's specific needs.

### Why KM² Solutions?

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# CASE STUDY: ACUITY FOR PERFORMANCE

## INDUSTRY

- Auto Finance

## LOCATIONS

- Barbados

## BENEFIT

Companies with highly engaged workforces outperform their peers by 147%, report 23% better employee turnover rates, and are 12 times more likely to have stronger business results.

## KEY METRICS

- Quality
- Average Handle Time
- Wrap Time
- Attendance

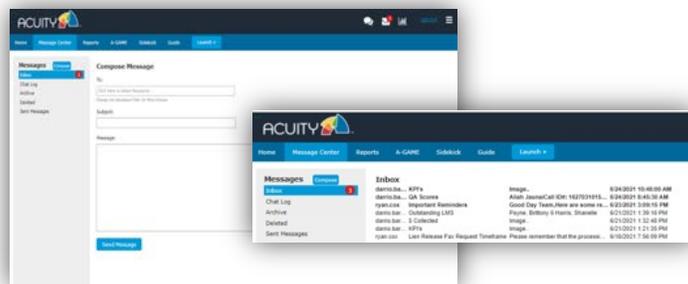
When Acuity is integrated into client programs, KM<sup>2</sup> drives better performance through employee engagement while reducing attrition.

**Summary:** KM<sup>2</sup> Solutions supports the financial services arm of a leading U.S. automotive manufacturer. By utilizing Acuity, a Workforce Optimization and Employee Engagement tool from Touchpoint One, employees interact with a dashboard that drives performance through gamification of key metrics. These are some of the features of Acuity that give us the cutting edge when it comes to performance.

**Custom Dashboard Views:** Acuity's web-based dashboard is customizable based on role and color-coded for easy understanding. It is accessible at any level of operations across the entire organizational structure. Real-time reports are generated directly, saving valuable time on data gathering and freeing up supervisors to spend more constructive time one-on-one with their agents.



**Chat, Message, and Alert Engine:** Acuity's built-in personnel communication system allows for real-time multi-client, multi-site collaboration and conversation. By directly addressing agent support, coaching, and troubleshooting on the fly, it accelerates agent performance while streamlining the performance management process by documenting and classifying supervisor/agent interactions.





# CASE STUDY: ACUITY FOR PERFORMANCE

## KEY ADVANTAGES

- Custom KPI's & Metrics
- Analytic & Quality Modeling
- Messaging & Alert Engine
- Evaluations & Surveys
- Reporting & Trending
- Gamified Rewards/Incentives
- Attrition Tracker

## SUCCESS METRICS

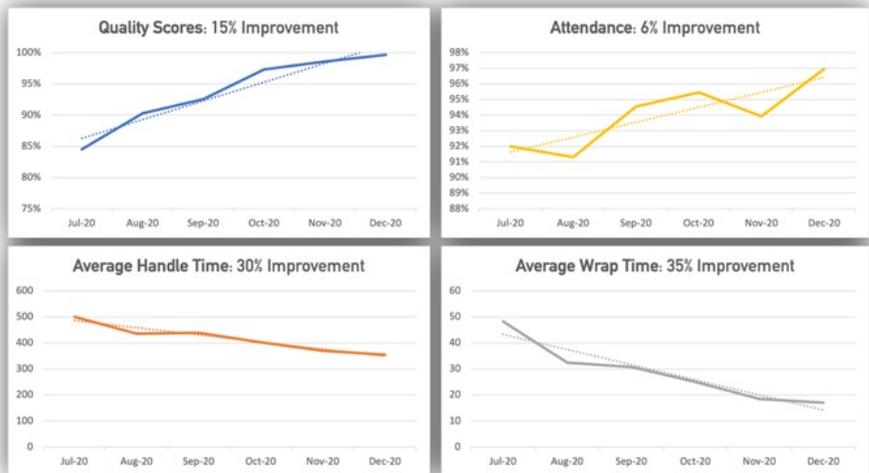
- Increased Attendance
- More Dollars Per Contact
- Faster Interaction Times
- Improved CSATs
- Employee Satisfaction
- Reduced Agent Attrition



**Performance Gamification:** Through Acuity's gamification solution, supervisors can create custom-themed games scored on desired KPI's aligned to business objectives, incentivizing and rewarding employees for achieving or exceeding performance goals. Agents compete for financial benefits, merchandise, or other incentives of choice. The application of gamification has vastly improved quality, morale, retention, attendance, and customer experience metrics while strengthening the overall workplace culture.



### Overall Team Improvements:



## Why KM² Solutions?

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# CASE STUDY: AUTO LOANS COLLECTIONS

## INDUSTRY

- Auto Finance

## SERVICES

- Collections
- Customer Care
- Funding
- Loan Verification

## LOCATIONS

- St. Lucia

## SUCCESS METRICS

- Optimized KPI's
- Outperformed Internal Teams
- Outperformed External Teams
- Dollars Collected

**Story:** A premier U.S. Auto Finance Company relies on KM<sup>2</sup> to support its subprime portfolio and credit-challenged customer base.

### Opportunity:

- Inventory was aging and becoming less collectible
- The client wanted to optimize KPI performance over and above their targets with the internal team.

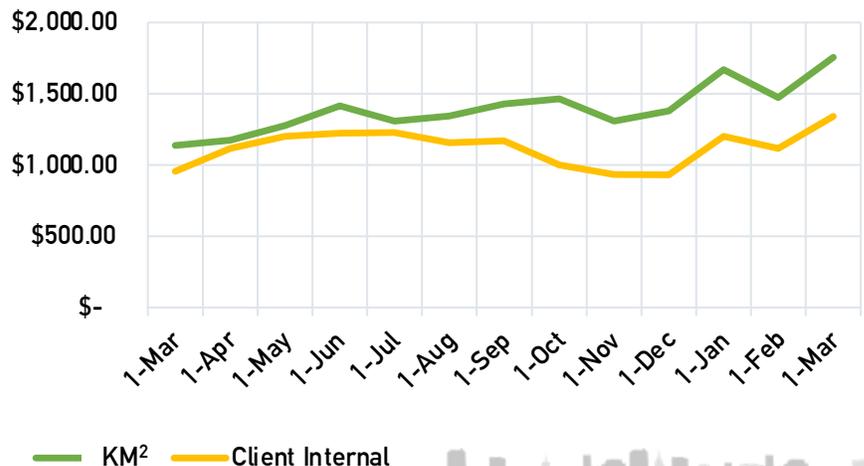
### Approach:

- Develop system environment to facilitate importing daily collections files; transmit results at EOD
- Train/coach agents to effectively cure aging inventory as well as current inventory based on client procedures
- Implement dialer strategy and proactive omnichannel outreach campaign

### Results:

- 124% metric achieved for dollars per agent per hour collected by KM<sup>2</sup> above internal performance
- Exceeded internal team performance expectations within the first 2 months of "go live"

Dollars Collected



## Why KM<sup>2</sup> Solutions?

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## INDUSTRY

- Retail (Nonstore)

## SERVICES

- Inbound/Outbound
- Sales
- Cross-Sell/Up-Sell
- Accounts Receivable
- Billing

## LOCATIONS

- Barbados

## SUCCESS METRICS

- Increased Cash Flow
- Improved Roll Rate
- Exceeded Kept Rate
- Exceeded Dollars Collected

## Why KM² Solutions?

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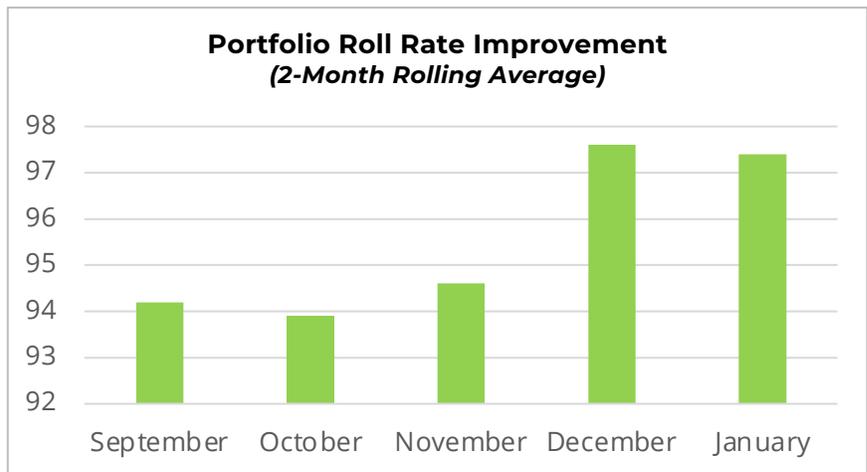
# CASE STUDY: CASH FLOW & ROLL RATE

**The Challenge:** A U.S.-based nonstore retail company engaged KM² Solutions to strengthen collections performance across its receivables portfolio. Cash recovery had weakened and delinquency movement between aging buckets was increasing, placing pressure on portfolio stability.

**The Solution:** KM² implemented a structured collections strategy focused on account segmentation and disciplined follow-up. Accounts were prioritized by risk profile, balance level, and delinquency stage, enabling collectors to target high-impact accounts and strengthen promise-to-pay adherence.

**The Result:** Over a 6-month performance window (Sep-Jan):

- **100% of agents exceeded kept-rate targets**
- **92% exceeded dollars-collected targets**
- **No-impact performance exceeded targets by 53% month over month**
- **Portfolio roll rates improved consistently**



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# CASE STUDY: CHAMPION/CHALLENGER

## INDUSTRY

- Telecoms

## SERVICES

- Inbound / Outbound
- Customer Care
- Service-to-Sales
- Sales & Upsell
- Retention Desk

## LOCATIONS

- Honduras
- Colombia

## SUCCESS METRICS

- Delinquent Updates
- Customers Upsold
- Customers Retained

**The Challenge:** A Fortune 500 telecommunications provider engaged KM<sup>2</sup> Solutions to compete against internal teams in a champion/challenger model across retention and upsell programs. The objective was to improve performance while maintaining strict brand and customer experience standards..

**The Solution:** KM<sup>2</sup> implemented a structured performance framework focused on training, coaching, and incentive alignment. Agents completed a multi-step training program to build product and service expertise, while coaching reinforced the client's retention and upsell methodology. Incentive structures were aligned with performance outcomes to drive consistent execution.

**The Result:** KM<sup>2</sup> consistently outperformed legacy in-house teams across key service and revenue metrics.

- **77% delinquent customer updates vs. 52% target**
- **62% of customers upsold vs. 50% target**
- **65% customer retention vs. 60% target**

Strong performance led the client to expand volume to KM<sup>2</sup> and introduce additional lines of business over time.

### KM<sup>2</sup> Performance vs. In-House Teams

| Metric                           | Target | Achieved |
|----------------------------------|--------|----------|
| % of Delinquent Customer Updates | 52%    | 77%      |
| % of Customers Upsold            | 50%    | 62%      |
| % of Customers Retained          | 60%    | 65%      |

## Why KM<sup>2</sup> Solutions?

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# CASE STUDY: CLIENT IMPLEMENTATION

## INDUSTRY

- Insurance

## SERVICES

- Bilingual Phone
- Bilingual Chat
- Back-Office Processing

## LOCATION

- Dominican Republic

## SUCCESS METRICS

- Record Delivery Time
- Surpassed All KPI's
- Outperform Internal Teams Net on Average
- Full Staffing - Trained and Operational in 90 days
- No Implementation or Development Delays
- Due to Success Rates, New Lines of Business and Tasks Added

**Summary:** The KM<sup>2</sup> implementation team makes the onboarding process seamless, even with the most complex requirements.

**Story:** When one of the top ten U.S. insurance companies approached KM<sup>2</sup>, it had limited outsourcing experience. With the requirement to cover four lines of business and bilingual inbound/outbound voice, chat, and back-office tasks for each, KM<sup>2</sup> rose to the challenge.

Despite the complexities, through close collaboration, the KM<sup>2</sup> implementation team executed flawlessly in not just implementing requirements within a 90-day window but also delivering over 300 implementation elements, with the added challenges of multi-system integration (inContact, Citrix) and training a full quota of staff remotely.

### Client Testimonial:

*"I want to thank the KM<sup>2</sup> team for their flexibility and attention to detail. Being able to pull off rolling out two different programs with different brands and channels, all in a virtual environment has been fun and exciting! I'm excited about our long-term future together as we move forward."*

Our implementation team has worked on hundreds of client startups. Whatever the complexity of the task at hand, our deep experience and consistent track record of success make KM<sup>2</sup> Solutions your perfect outsourcing partner.

## Why KM<sup>2</sup> Solutions?

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# CASE STUDY: COLLECTIONS PERFORMANCE

## INDUSTRY

- Auto Finance

## SERVICES

- Customer Care
- Collections
- Loan Origination

## LOCATIONS

- Barbados
- Honduras

## SUCCESS METRICS

- Conversion Rate
- Same Day/Next Day
- Appointments per Hour
- Quality
- Surpassed All KPI's

**Summary:** KM<sup>2</sup> Solutions has been a strategic partner of a leading U.S. Consumer Financial Services Company for over eight years. KM<sup>2</sup> was tasked to collaborate with their team to find ways to improve collections performance in a multi-site environment.

**Opportunity: Adjustment to account placement timing.**

- Early-stage collections held until 15 days delinquent, which limited early account penetration
- Scheduling not heavily weighted during prime time

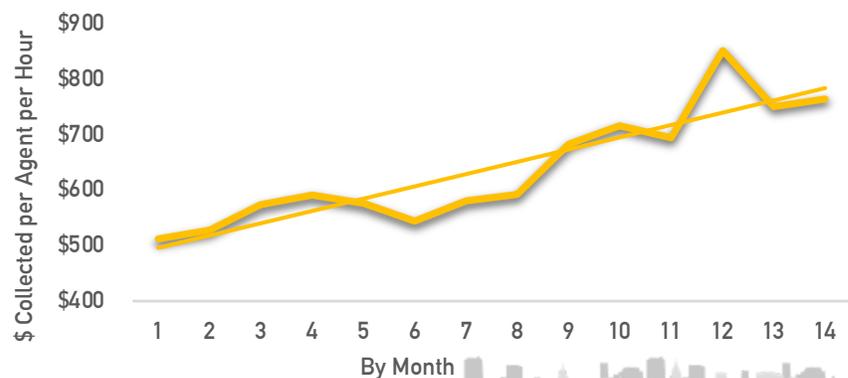
**Approach: Change of placement timing to 5 days delinquent.**

- Increased collections penetration
- Dialer digitized messaging
- Adjusted schedules to benefit from more hours in prime time

**Results: Early-stage delinquency reduction through improved collection recovery.**

- Improvement from 79.6% of account in early-stage recovery to 89.8%
- Dollars collected per hour increased by \$252.
- With 71 total agents on the program, the client will see \$37.25M more in incremental collections over the next 12 months.

### Dollars Collected per Hour



### Why KM<sup>2</sup> Solutions?

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## INDUSTRY

- Healthcare

## SERVICES

- Customer Care
- Scheduling
- Upsell
- Billing

## LOCATIONS

- Honduras

## SUCCESS METRICS

- Conversion Rate
- Same Day/Next Day
- Appointments per Hour
- Appointments Kept
- Quality Score

## Why KM² Solutions?

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# CASE STUDY: CONSULTATIVE APPROACH

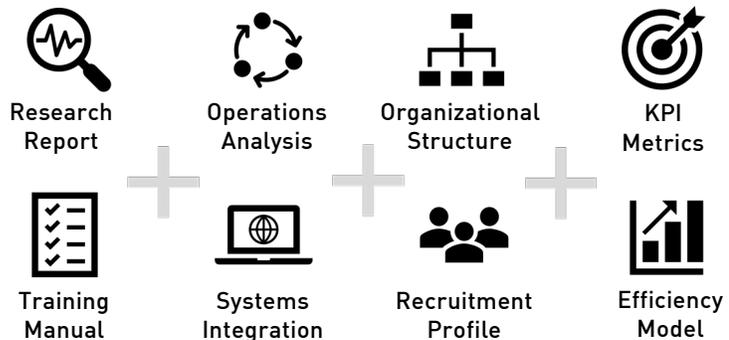
**Summary:** KM² Solutions' consultative approach means we can successfully tailor programs to a client's specific needs. Through an immersive visit, we can use our knowledge and expertise to identify areas of improvement and systems integration opportunities.

**Story:** A top Dermatology Company in the U.S. with no prior outsourcing experience approached KM² to provide tailored solutions to aid the client's growth and productivity and foster patient trust. KM² Solutions dispatched an experienced operational team to analyze areas of opportunity over a 2-week immersed visit and draft a plan of action.

### Key Issues Identified:

- No formal training material
- No standardized call flow
- No quality assurance or KPI's established
- Little integration between customer touch-points

### Output of Consultation:



After the visit, KM² distributed key documentation to the client that provided the roadmap for future success. Going forward, KM² could more easily integrate with the client's operations, meet desired metrics, and increase overall revenue.

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# CASE STUDY: EXCEEDED COLLECTIONS METRICS

## INDUSTRY

- Financial Services

## SERVICES

- Customer Care
- Collections
- Loan Verification
- Lead Generation/Sales
- Data Entry
- Loan Servicing
- Chat

## LOCATIONS

- Barbados
- Dominican Republic
- Grenada
- St. Lucia

## SUCCESS METRICS

- Improved Performance
- Dollars Collected
- Kept Rate
- Cure Rate
- Penetration Rate

**Story:** A leading U.S. Consumer Financial Services Company and strategic partner of KM<sup>2</sup> Solutions for over 20 years tasked KM<sup>2</sup> with improving collections metrics in a multi-site environment.

**Opportunity:** Account placement timing

- Early-stage collections held until 15 days delinquent
- Impact to collection account penetration
- Limited collection cycle

**Approach:** Change of placement timing to 5 days delinquent

- Increased collection penetration
- Dialer digitized messaging

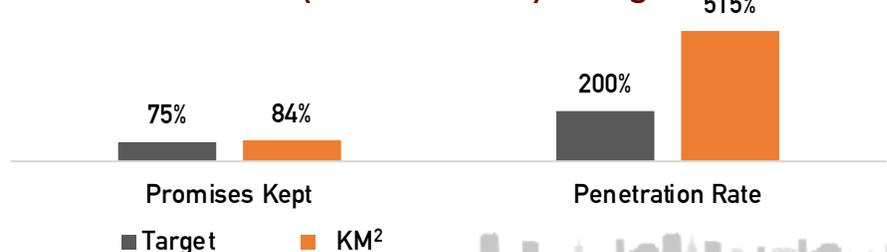
**Results:** Early-stage delinquency reduction through improved collection recovery

- Improvement from 79.6% of account in early-stage recovery to 89.8%
- Improvement from 73.7% of dollar early-stage recovery to 86.3%

### Year on Year Performance Improvement:



### KM<sup>2</sup> Performance (2021 & 2020 YTD) vs Target:



## Why KM<sup>2</sup> Solutions?

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### INDUSTRY

- Retail & eCommerce

### SERVICES

- Inbound Voice
- Outbound Voice
- Back-Office Support

### LOCATIONS

- Barbados

### SUCCESS METRICS

- ACW
- Kept Rate
- Resolve Rate
- Upsell
- Calls per Hour
- Revenue per Hour

## CASE STUDY: IMPROVED UPSELL AND ACW

**The Challenge:** A leading U.S. retail and e-commerce company engaged KM<sup>2</sup> Solutions to support voice and back-office operations across customer service and sales programs. Performance improvement was needed in both upsell outcomes and operational efficiency, particularly reducing after-call work (ACW).

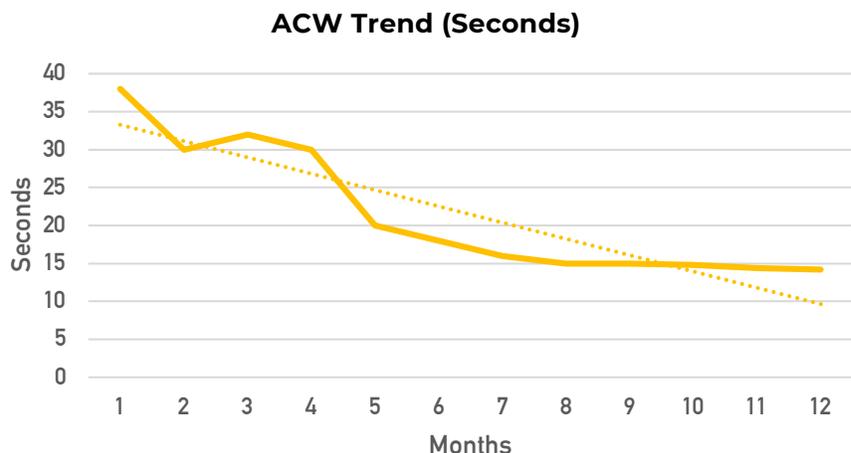
The objective was to increase the percentage of customers upsold and overall upsell revenue while improving agent productivity.

**The Solution:** KM<sup>2</sup> implemented a structured performance framework focused on training, coaching, and workflow optimization.

Agents completed a multi-step training program to strengthen product knowledge and sales execution, while CRM macros and workflow improvements helped reduce manual effort during after-call work. Incentive structures and coaching programs reinforced consistent upsell behavior and operational efficiency.

**The Result:** Over a twelve-month performance window:

- ACW reduced by 24 seconds from a peak of 38 seconds
- Operational efficiency improvements generated approximately \$135K in annual savings across 100 FTE





## BENEFIT

KM² Solutions works closely with both our clients and internal teams to ensure that we maximize performance at every opportunity. We grow, and grow with, your business.



### Why KM² Solutions?

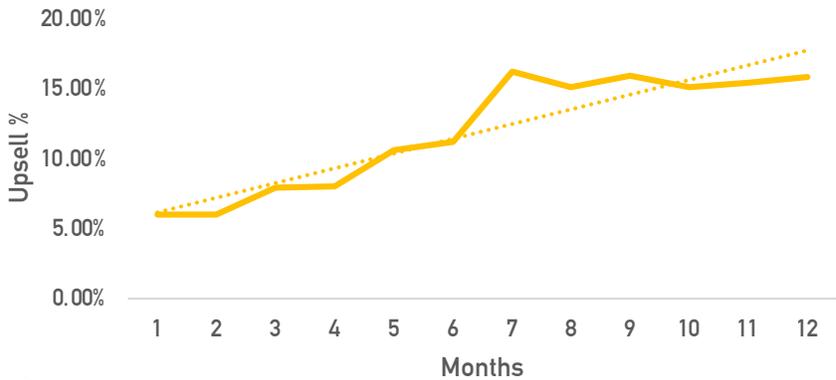
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# CASE STUDY: IMPROVED UPSELL AND ACW

## Upsell Conversion Performance

- Customers upsold tripled during the engagement period

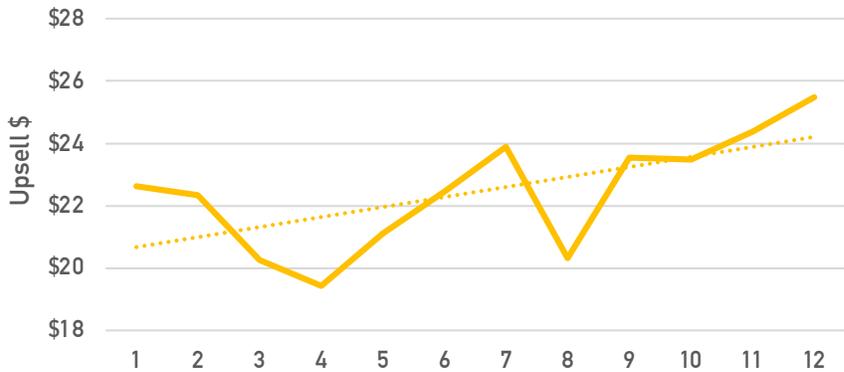
Upsell Conversion Rate by Month



## Revenue Impact

- Upsell value increased by an average of \$3 per sale
- Upselling revenue increased by approximately \$374K annually with 100 FTE

Average Upsell Value (\$)



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# CASE STUDY: INCREASED COLLECTIONS

## INDUSTRY

- Auto Finance

## SERVICES

- Collections
- Customer Care
- Funding
- Loan Verification

## LOCATIONS

- Barbados

## SUCCESS METRICS

- Increased Performance
- Increased Dollars Collected
- Added New LOB's
- Outperformed Onshore Teams

**Story:** A leading U.S. Subprime Auto Finance Provider relies on KM² for first-party, early-stage collections.

### Opportunity:

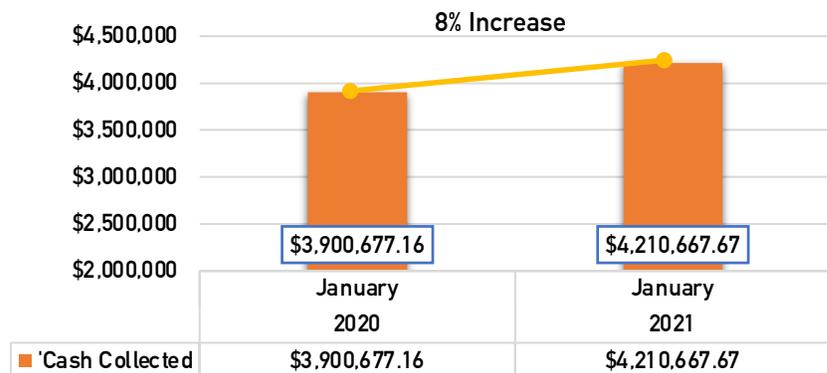
- Subpar performance in dollars collected per hour.

**Approach:** Collaborated with client to assess and identify queueing strategy improvements, including:

- Identified challenges and made recommendations for improvement.
- Developed a strategy to improve team performance.
- Prioritized high-balance accounts.
- Implementation of a new dialer strategy.
- Changed time-of-day contacts.

### Results:

- Increased collections performance consistently month over month in the past 12 consecutive months.
- Obtained client approval to handle payments above \$1000 and payoffs.
- Cash performance improved by 8% from \$3,900,677 in January 2020 to \$4,210,667 in January 2021.
- Outperformed Stateside counterparts in Quality Scorecard.



## Why KM² Solutions?

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## INDUSTRY

- Financial Services

## SERVICES

- Pre-Origination Support
- Customer Care
- Early-Stage Collections
- Bi-Lingual Support

## LOCATIONS

- Colombia
- Dominican Republic
- St. Lucia

## KEY METRICS

- CSAT/NPS
- First Call Resolution (FCR)
- Quality/Compliance Scores
- Roll Rates
- Average Payment Size
- Promise Kept Rate

# CASE STUDY: ISSUE RESOLUTION

### Summary:

KM² Solutions provides Pre-Origination Support, Loan Servicing, Early-Stage Collections, and Bi-Lingual Support for a well-known U.S. Auto Finance company. During this relationship, our client acquired a new portfolio that required servicing by our team. As our Agents spoke with the customers on this newly acquired portfolio, situations immediately surfaced that could not be resolved by our agents. The training provided and the Knowledge Base tools used for this program did not provide clear guidance for our agents to resolve these issues for our clients' customers.

### Story:

The issue occurring most frequently on the new portfolio involved customers stating that they had made the final payment on their loan on or before the due date but had not yet received the new title with the lienholder removed. Many of the customers were calling in daily to get this issue resolved.

Our agents escalated these issues to the client to verify that the vehicle loan had been paid in full, the funds had cleared, and the team managing the titles could trigger the release of the lienholder so the new title could be issued and sent to the customer. Once the client verified the loan was paid in full and gave our agents an ETA on the title release, our agents circled back with the customer to let them know and set the expectation on when they should receive a new title.

### Resolution:

Because our program managers saw many instances of this issue, a complaint log was created. Our agents documented the log each time a complaint occurred. After accumulating enough data around this issue to illustrate the trend, we collaborated with the client to design a new process that included checks and balances. This ensured the title was released correctly after the payoff amount was made and the funds cleared.



## BENEFIT

KM² Solutions views each incoming call as an opportunity to work with our clients to resolve issues before they happen. This approach creates real value and a deep level of trust with our clients.



### Why KM² Solutions?

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## CASE STUDY: ISSUE RESOLUTION

Our existing agents were upskilled in the new process, and new training materials were created to ensure all new agents were trained in this area. We also updated the client's Knowledge Base tool and incorporated additional quality audits after implementing the new process to ensure this issue did not continue.



By escalating this issue and quarterbacking it through to resolution both at the customer account level and at the program level, KM² was able to prevent this from happening in the future for our client. This effort resulted in improved CSAT/NPS, First Call Resolution (FCR), and a higher level of loyalty to our client's brand.

KM² Solutions views each incoming call as an opportunity to work with our clients to resolve issues before they happen. This approach creates real value and deep trust with our clients.

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## CASE STUDY: REDUCING AHT

### INDUSTRY

- Auto Finance

### SERVICES

- Customer Care
- Welcome Calls
- Loan Originations/Verifications
- Collections

### LOCATIONS

- Barbados

### SUCCESS METRICS

- AHT
- Calls Abandoned
- QA
- Calls Forecasted
- Calls Received
- Revenue

**Summary:** A premier U.S. Motorcycle Finance Company relies on KM<sup>2</sup> to provide exceptional customer service for its riders. As a new client of KM<sup>2</sup>, we collaborated with them to lower their overall costs while maintaining their high brand loyalty and meeting established service levels.

#### Opportunity:

- The client has built their business over decades by building global brand recognition with a certain clientele
- Realizing new budget constraints, the client is challenged to maintain brand loyalty and service levels but at a lower cost of ownership

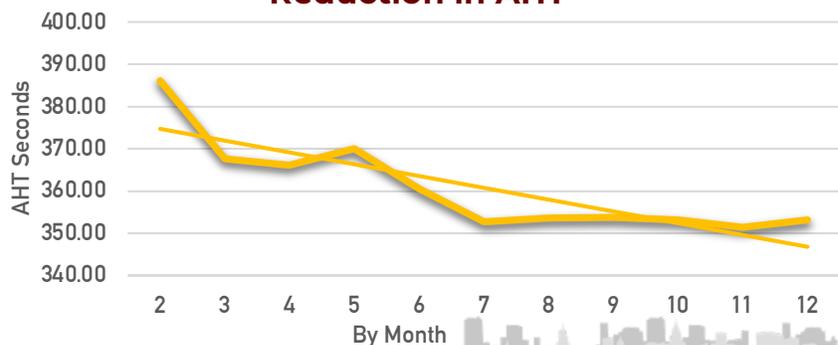
#### Approach:

- Establish a training process with thorough knowledge base and an acute understanding of the client's culture
- Employ incentive plans to promote superior performance and client image
- Implement a coaching program to inspire, convey, and execute client methodology

#### Results:

- Consistently beat quality goals and service levels since inception
- Drove AHT down by 27 seconds
- With 60 agents on the program, KM<sup>2</sup> was able to service the client's accounts with 7k fewer hours, saving the client over \$114k

#### Reduction in AHT



### Why KM<sup>2</sup> Solutions?

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## INDUSTRY

- Financial Services

## TASKS

- Loan Servicing
- Data Capture
- Data Processing
- Document Verification

## LOCATIONS

- Barbados
- Dominican Republic
- Grenada
- St. Lucia

## KEY ADVANTAGES

- Collective Learning
- Shared Best Practices
- Uncover Inconsistencies for Compliance
- Better Redundancy Capabilities

## Why KM² Solutions?

KM² Solutions is an award-winning BPO with over two decades of experience operating an exclusively nearshore strategy throughout the Caribbean and Latin America. The company provides clients with a host of outsourcing solutions, including customer care, receivables management, technical support, sales & marketing, data analytics, and back-office processing. KM² Solutions maintains PCI DSS compliance, completes an annual SOC 2 audit, and has a Compliance Management System that aligns with the FDIC.

# CASE STUDY: MULTIPLE GEOGRAPHIES

**Summary:** KM² Solutions operates multiple sites across six countries in the Caribbean and Latin America, allowing its clients high-level bilingual options, better performance, flexibility, and redundancy for business continuity purposes.

**Story:** A leading Financial Services Company in the U.S. relies on KM² for its outsourcing solutions across multiple lines-of-business. By leveraging four of our geographies, we can maximize agent performance through shared best practices and internal competition.

With a diverse geographic footprint, KM² has maintained business continuity when faced with localized events such as communications or infrastructure outages, climate and weather-related anomalies, or geopolitical-related shutdowns.



KM² only chooses locations in regions that provide access to a talented and well-educated workforce, robust technology infrastructure, and ease of access for clients. Clients in more than one location benefit from increased performance, better uptime, flexibility, and scalability and have access to more specialized skillsets.

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# CASE STUDY: MULTIPLE LINES OF BUSINESS

## INDUSTRY

- Financial Services

## SERVICES

- Customer Care
- Collections
- Loan Verification
- Lead Generation/Sales
- Data Entry
- Loan Servicing
- Chat

## LOCATIONS

- Barbados
- Dominican Republic
- Grenada
- St. Lucia

## SUCCESS METRICS

- Seamless Implementation
- Rapid Scalability
- Multi-Site, Multi-Geo Placement
- Bilingual Support

**Summary:** KM<sup>2</sup> Solutions wins new lines of business through a proven track record of success. We support our clients across the entire customer lifecycle and regularly implement new projects based on developing needs.

**Story:** A leading Consumer Financial Services Company has been a strategic partner of KM<sup>2</sup> for over 15 years. Having started with just 20 FTE performing basic call services, we now have over 600 agents working in multiple geos and across multiple lines of business. KM<sup>2</sup> is viewed as a tried, trusted, and flexible partner, able to take on new challenges and win new business over time.

In the initial stages of the partnership, KM<sup>2</sup> primarily serviced welcome calls and support functions. As we outperformed in those tasks, the client expanded our scope of work. Today, we additionally provide collections, loan verification, sales, back-office processing, and chat services.

### Implementation of Services Timeline:



With multiple contact centers across six geographies, KM<sup>2</sup> Solutions provides bilingual support and multiple levels of business continuity. KM<sup>2</sup> Solutions can also leverage talent across the organization to drive improved performance results.

## Why KM<sup>2</sup> Solutions?

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# CASE STUDY: NEARSHORE VS OFFSHORE

## INDUSTRY

- Auto Finance

## TASKS

- Bilingual Phone
- IB/OB Collections
- IB/OB Pre-Funding
- Back-Office Processing
- New Deal Funding

## LOCATIONS

- Dominican Republic
- Grenada
- St. Lucia

## KEY DIFFERENTIATORS

- Proximity to the U.S.
- Cultural Empathy
- Ease of Doing Business
- Bilingual Support

**Story:** KM<sup>2</sup> Solutions is partnering with a major U.S. Auto Finance Company with offshore locations in the Philippines. KM<sup>2</sup> competes against these offshore vendors with our nearshore teams based in the Dominican Republic, Grenada, and St. Lucia. In both voice and back-office services, KM<sup>2</sup> unanimously outperforms.

**Summary:** KM<sup>2</sup> consistently outperforms the clients' offshore provider while increasing volume and expanding into additional KM<sup>2</sup> nearshore geographies.

- Grew program in size by nearly 500% while maintaining competitive performance vs. their other established offshore provider (2+ years).
- Launched new LOB successfully, which brought the queue back into managed status.
- Regularly outperform competing providers on collection metrics (\$ collected and roll rate).

For this client, some data is shared related to agent performance in various geographies. Through direct comparison, KM<sup>2</sup> nearshore agents score consistently higher than the client's offshore locations.

### Key Performance Data:

Year Totals  
Aug '19 - Aug '20

Win Rate % vs. Offshore **67%**

(\$ Collected 1-30 days past due)

Win Rate % vs. Offshore **58%**

(\$ Collected 31-50 days past due)

**Overall QA % for Year** **96.96%** (Goal 95%)

## Why KM<sup>2</sup> Solutions?

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## CASE STUDY: NPS IMPROVEMENT

### INDUSTRY

- Auto Finance (Captive)

### SERVICES

- Customer Service
- Collections (Servicing)
- Back Office:
  - Post Funding
  - Account Updates
  - Credit Bureau Disputes
  - End of Lease

### LOCATIONS

- Dominican Republic
- Honduras

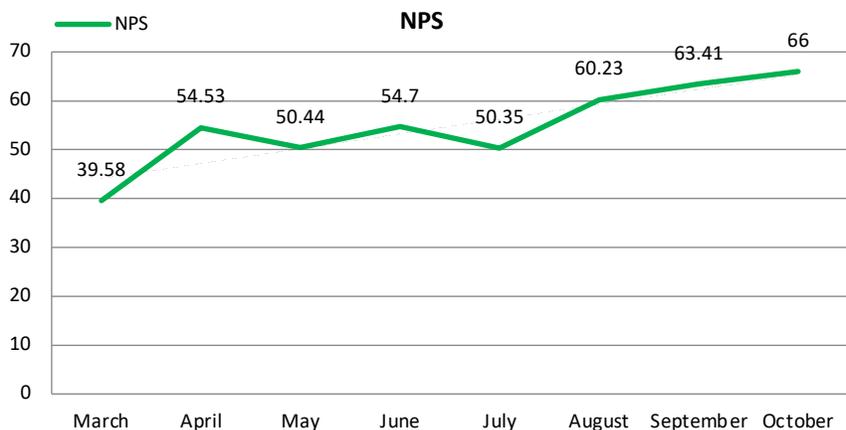
### SUCCESS METRICS

- NPS Improvement
- ASAT Consistent
- NPS from 39.58 (Mar) to 66 (Oct)

**Summary:** KM<sup>2</sup> Solutions partners with a leading U.S. automotive finance company to enhance customer sentiment and brand perception across its nearshore operations. The client aimed to elevate Net Promoter Score (NPS) while maintaining compliance, accuracy, and efficiency.

**Opportunity:** Although operationally strong, NPS performance had plateaued. The client sought measurable, sustainable gains driven by process discipline and a people-first approach, without impacting productivity.

**Approach:** KM<sup>2</sup> launched a structured NPS acceleration program focused on agent development, supervisor calibration, weekly performance deep dives, targeted incentives, client collaboration, and culture building.



**Results:** Within seven months, KM<sup>2</sup> achieved record performance:

- NPS improved from 39.58 to 66 MTD, the highest score since launch.
- ASAT held steady at 4.41, ensuring consistent quality and experience.
- The initiative boosted customer satisfaction, engagement, and loyalty, reinforcing KM<sup>2</sup>'s reputation as a trusted, results-driven partner.

### Why KM<sup>2</sup> Solutions?

KM<sup>2</sup> Solutions operates contact centers throughout the Caribbean and Latin America. The company provides clients with a host of different solutions, including customer care, receivables management, technical support, sales and marketing, data analytics, and back-office processing. KM<sup>2</sup> Solutions maintains PCI DSS compliance, completes a SOC 2 audit annually, and has a Compliance Management System that meets the FDIC standards.

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# CASE STUDY: ORDER TAKING PERFORMANCE

## INDUSTRY

- Retail & eCommerce

## SERVICES

- Order Taking
- Order Processing
- Upsell
- Loan Verification

## LOCATIONS

- Honduras

## SUCCESS METRICS

- Conversion Rate
- Average Handle Time
- Check Size

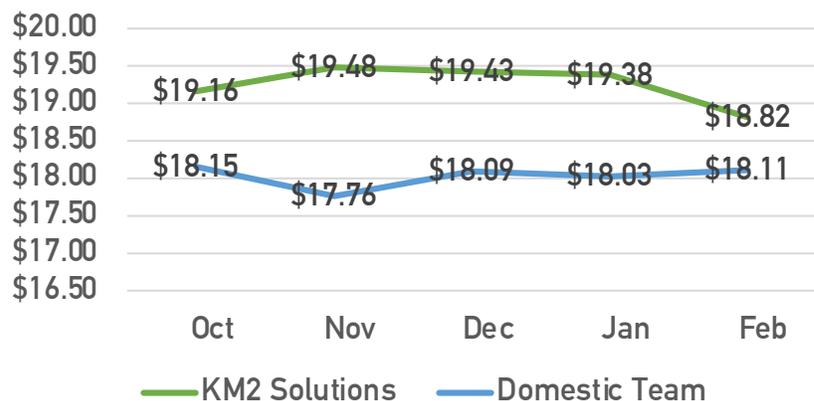
**Story:** KM<sup>2</sup> Solutions partnered with a premier take-out order processing organization in the U.S. to complement their stateside contact center, processing billions in sales for thousands of locations across dozens of top brands.

**Approach:** KM<sup>2</sup> agents handled order-taking, upselling, and processing across three of their top brands simultaneously with set KPI goals on Conversion Rate, Handle Time, and Check Size while directly competing with the client's U.S. domestic team.

**Results:**

KM<sup>2</sup> not only exceeded all goals set but outperformed their U.S. equivalents across all KPI's, increasing Check Size by 7% more than the client's domestic team. This means more revenue and higher margins per order.

### Check Size



### Why KM<sup>2</sup> Solutions?

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# CASE STUDY: PERFORMANCE ADAPTABILITY

## INDUSTRY

- Financial Services

## TASKS

- Collections
- Loan Servicing
- Data Capture
- Data Processing
- Document Verification

## LOCATIONS

- Barbados
- Grenada
- Honduras
- St. Lucia

## SUCCESS METRICS

- Increased Collection Dollars
- Identified Performance Gaps
- Improved Roll Rate
- Increased Collected Dollars Per Hour

**Story:** A leading Financial Services Company in the U.S. relies on KM<sup>2</sup> for Verification, Loss Mitigation, and Collections services. KM<sup>2</sup> can quickly adapt to changes in KPI's and performance objectives.

### Opportunity:

- Rapidly increase \$/RPC (Productivity) due to KPI change in January
- Identify opportunities to improve collections efficiency to consistently exceed performance in dollars per hour in Early and Mid-Stage Collections.

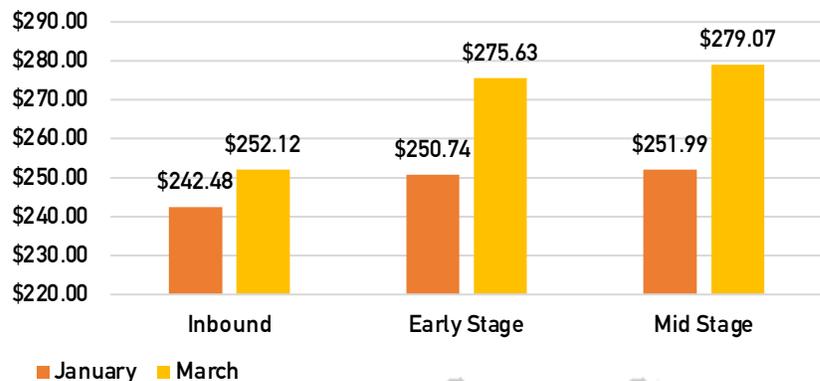
### Approach:

- Identify significant performance gaps in the bottom-performing tier
- Implement dialer strategy and proactive omnichannel outreach campaign

### Results:

- Increased collections performance by 8% within 45-60 days, resulting in an increase of cash flow of \$1.2 million

### Increased Collected \$/per Hour:



## Why KM<sup>2</sup> Solutions?

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# CASE STUDY: RAPIDLY SCALING CLIENT

## INDUSTRY

- Auto Finance

## SERVICES

- Customer Care
- Collections
- Loan Origination

## LOCATIONS

- Barbados
- Honduras

## SUCCESS METRICS

- Conversion Rate
- Same Day/Next Day
- Appointments per Hour
- Quality
- Exceeded All KPI's

**Overview:** KM<sup>2</sup> Solutions can rapidly scale with clients in scope and size, increasing both services offered and geographic locations for business continuity purposes. KM<sup>2</sup> responds quickly and seamlessly to scaling its solutions to meet clients' needs.

**Summary:** KM<sup>2</sup> Solutions partners with a fast-growing auto finance company that relies on our teams for customer service and collections support. Growth levers for this client have included M&A, rapid organic growth, and industry partnerships. We have been able to rapidly add quality agents and tenured supervisors as the expansion needs continued. Quality and performance remain constant during these scaling periods.

Staffing these programs in high growth periods is quickly completed, given our strong HR departments and efficient recruitment marketing.

Program Revenue Growth Following Client Acquisitions



## Why KM<sup>2</sup> Solutions?

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## INDUSTRY

- Healthcare

## SERVICES

- Bilingual Phone
- Inbound Scheduling
- Outbound Scheduling
- Back-Office Processing
- Fax Follow-up
- Inbound Fax Data Capture

## LOCATIONS

- Colombia
- Honduras

## SUCCESS METRICS

- Rapid Rollout
- Flexible Scheduling
- Multisite & WFH Deployment
- Maintained Quality
- Cost Savings

### Why KM² Solutions?

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## CASE STUDY: REMOTE TRAINING

**Summary:** KM² Solutions can simultaneously train teams across multiple geographies for on-site and work-from-home deployment, reducing training time and costs while matching overall performance.

**Story:** KM² is partnered with a well-known U.S. Medical Diagnostics Company, providing bilingual Customer Care and Back-Office services across two of our geographies.

Our flexible training toolkit and robust technology platform allowed us to train 100 agents across multiple geographies remotely, with over half of those agents operating on a secured, WFH basis. This included new hires from nesting through to production.

Remote training allows for synergy between programs. Agents split over multiple locations can be taught at the same cadence on flexible schedules. This unified approach allows for greater continuity in terms of knowledge base and ease of virtual client interaction throughout the process.

### Remote Training - Goals Attained:



Rapid rollout of class while maintaining quality and performance standards.



Grew total team to 100 agents - including the launch of a 2nd site in under 3 months.



Added back-office functionality (fax) "on-the-fly" (approx. one-week implementation) based on unexpected client need.

KM² Solutions surpasses all metrics goals the client sets and regularly outperforms the client's internal team regarding efficiency and productivity. Performance data showed that our remote training scenario matched an on-site scenario while dramatically decreasing the time taken and costs incurred.

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# CLIENT CASE STUDY: RAPID RAMP TO SCALE

## INDUSTRY

- Travel & Hospitality

## SITE LOCATION

- St. Lucia

## CALL TYPES (HOST)

- Listing Management
  - Creation
  - Photos
  - Bookings
  - Fee Schedules
  - Payments
- Calendar Management
- Conflict Resolution
- Tax Questions
- Platform Navigation
- Host Coaching

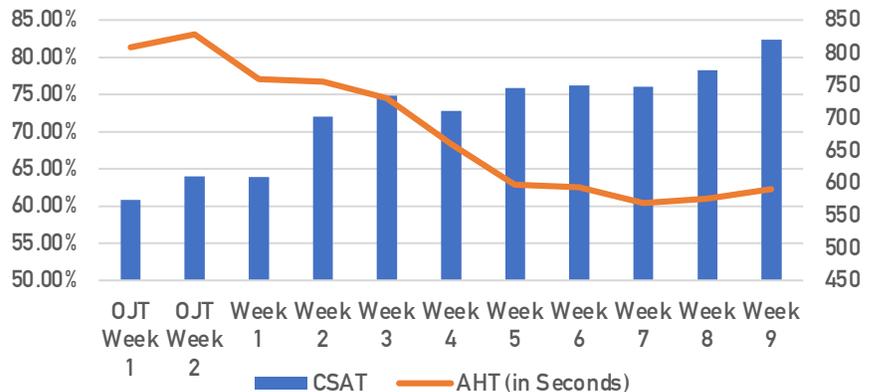
## CALL TYPES (GUEST)

- Guest Support (Pre-Travel)
  - Platform/Booking Support
  - Cancellations
  - Reschedules
  - Refunds
- Guest Care (During Travel)
  - Listing Inaccuracies
  - Access Issues
  - Lockouts
  - Early Departures
  - Non-Responsive Hosts
  - Conflicts

**Summary:** KM<sup>2</sup> Solutions has been partnered with the largest grossing US online travel booking and vacation rental marketplace company since 2018. KM<sup>2</sup> is tasked with providing pre, during, and post-travel support for both hosts and guests handling English language contacts (Voice, Email, Chat) from the North Americas, UK, EU, and Asia-Pacific markets.

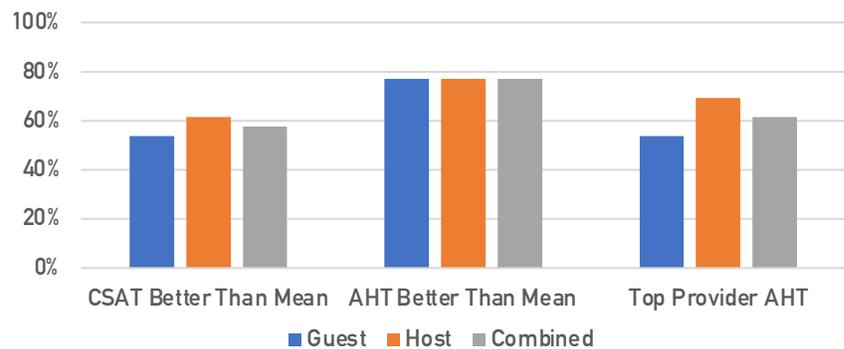
**Story:** Having launched with a pilot team of 25 agents, KM<sup>2</sup> was able to ramp this initial team to full proficiency in just 6 weeks, adding an additional class of 25 agents on week 4. Today, KM<sup>2</sup> provides over 200 FTEs for the client and is recognized as a preferred provider, entrusted with handling Premier VIP calls.

**KM<sup>2</sup> - Rapid Ramp to Proficiency**



KM<sup>2</sup> has consistently outperformed competing vendors in both the nearshore (LatAm) and offshore (Philippines) in CX metrics, with competitive CSATs and a best-in-class AHT.

**KM<sup>2</sup> vs. Other Providers: CSAT and AHT**





**SUCCESS METRICS**



“Our tenured agents worked closely with QA to identify opportunities to create greater efficiencies while still maintaining quality. AHT is a KPI we worked particularly hard on and are very proud to be consistently outperforming our competitors and driving better performance for our client.”

- KM² Operations Manager

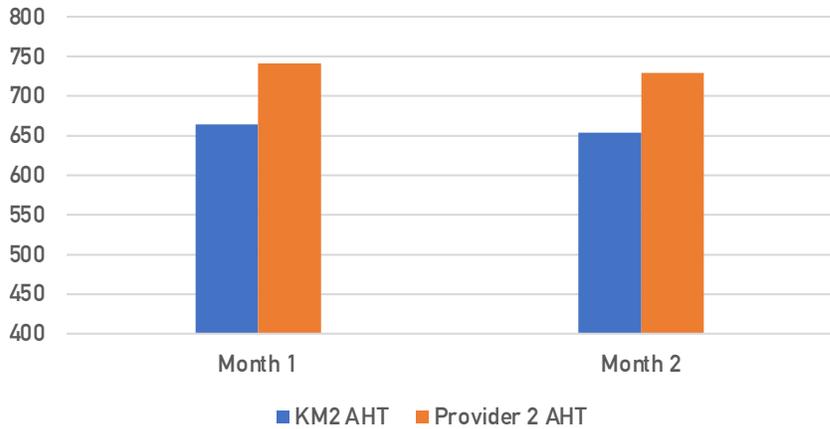


# CLIENT CASE STUDY: RAPID RAMP TO SCALE

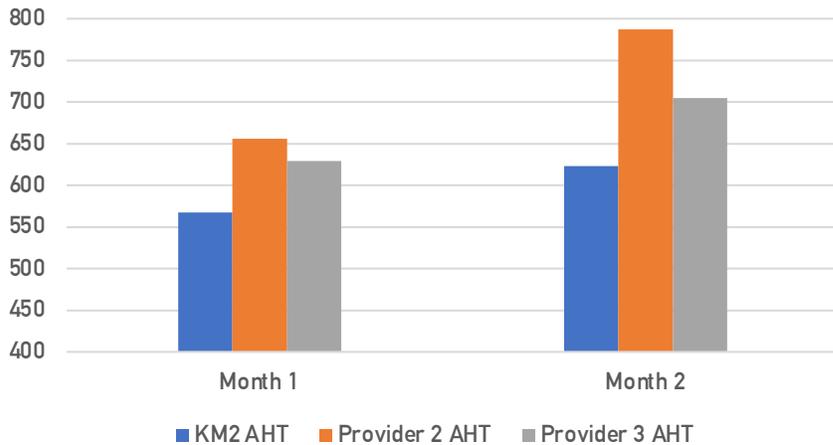
**Average Handle Time (AHT) vs. Other Vendors:**

KM² Solutions AHT for this client typically trends between 10-15% lower than all other providers allowing our agents to take more calls resulting in improved efficiency and a significant cost-benefit for our client.

**KM² Host AHT**



**KM² Guest AHT**





### KEY METRICS

- Customer Satisfaction (CSATs)
- Average Handle Time (AHT)
- Resolution Rate
- Pitch
- Inbound Conversion

### HYBRID MODEL

- 140 Agents on Secure WFH
- 60 Agents On-Site
- 20 Agents in Training (Growth)
- 24hr Operation

### PERFORMANCE

For this client, KM² Solutions utilizes the Acuity Performance Management and Employee Engagement Platform. This helps optimize people, processes, and technology. In turn, this enhances the employee experience, strengthens culture, and drives better overall performance while reducing attrition.

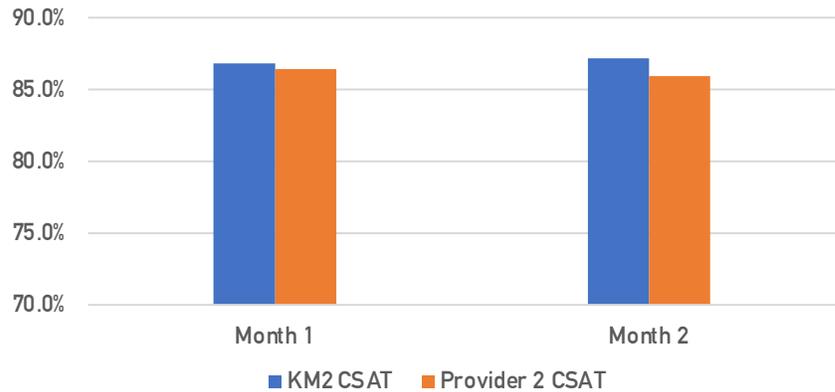


## CLIENT CASE STUDY: RAPID RAMP TO SCALE

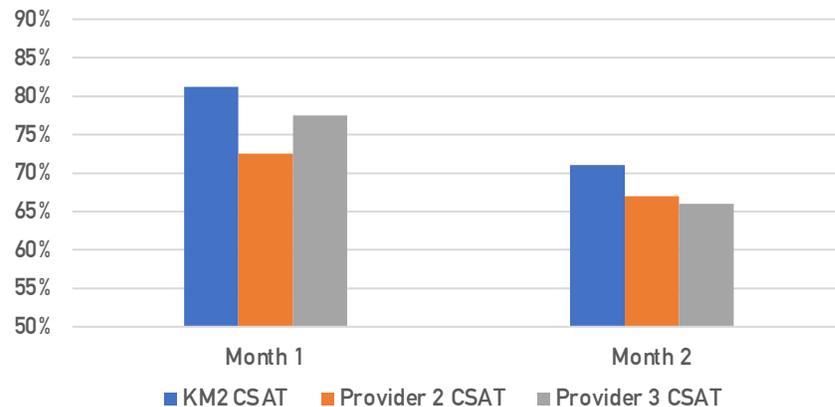
### Outperforming CSATs vs. Other Vendors:

Even with the pandemic presenting challenges in the travel space KM² has consistently outperformed its competitors in Customer Satisfaction.

**KM² Host CSAT**



**KM² Guest CSAT**



### Flexible Work Platform:

KM² Solutions currently services this client with a blended approach. Approximately 70% of our agents are operating on our secure, work-from-home (WFH) model with the remainder on-site.

KM² Solutions hybrid model, and multi-site, multi-geo footprint provides clients with additional layers of risk-mitigation and business continuity measures to ensure seamless operations in any eventuality.



# CLIENT CASE STUDY: RAPID RAMP TO SCALE

## TIMELINE

### Client/KM² Relationship Timeline:

- APR 2018 ● Launch with 25 Host Support agents
- JUN 2018 ● First full production month
- NOV 2018 ● Selected to provide UK Host (Partner) Support launched team of 10 agents
- MAY 2019 ● Added NA Guest (Partner) Support team of 40 agents
- NOV 2019 ● Selected as a preferred provider for Premier VIP calls (based on quality/CSAT performance)
- JAN 2020 ● Surpassed the 200 HC mark
- NOV 2020 ● Selected to provide support for EU (Netherlands)
- JUL 2021 ● Addition of Guest Care agents
- AUG 2021 ● Addition of APAC volume
- APR 2023 ● NPS soft-launched as the metric of focus for 2024
- APR 2024 ● KM² restructures Training & Quality team to provide a full CX-focused support team (with a new leader)
- JUN 2024 ● KM² becomes consistent top performer on NPS
- JUL 2024 ● Selected as the only vendor to pilot their new MUVR (multi-unit vacation rental) program – to success!

## Why KM² Solutions?

KM² Solutions is an award-winning BPO with over two decades of experience operating an exclusively nearshore strategy throughout the Caribbean and Latin America. The company provides clients with a host of outsourcing solutions, including customer care, receivables management, technical support, sales & marketing, data analytics, and back-office processing. KM² Solutions maintains PCI DSS compliance, completes an annual SOC 2 audit, and has a Compliance Management System that aligns with the FDIC.

For more information, please contact the Sales Team:

 (262) 385-0955

 [salesteam@km2solutions.com](mailto:salesteam@km2solutions.com)



# CASE STUDY: TRUE COST SAVINGS

## INDUSTRY

- Auto Finance

## SERVICES

- Customer Care
- Collections
- Loan Origination

## LOCATIONS

- Barbados
- Honduras

## SUCCESS METRICS

- Conversion Rate
- Same Day/Next Day
- Appointments per Hour
- Quality
- Surpassed All KPI's

**Summary:** KM<sup>2</sup> Solutions provides outsourcing solutions at over 50% less cost than domestic operations and consistently outperforms all KPIs.

**Story:** KM<sup>2</sup> Solutions has partnered with a well-known Auto Finance Company for over ten years. With two domestic sites operational in Atlanta and Houston, KM<sup>2</sup> was initially approached as a nearshore alternative to support Customer Care and Collections.

Through close consultation with the client's CFO and a deep dive into their fully burdened cost-per-agent, taking into account factors often overlooked such as utilities and benefits, it was revealed that KM<sup>2</sup> Solutions' all-in cost was more than half the cost of their domestic equivalents.

### Cost Benefit Analysis:

| Captive/Domestic US            |                | KM <sup>2</sup> Nearshore                      |                                     |
|--------------------------------|----------------|--|-------------------------------------|
| Labor                          | \$20.00        |  |                                     |
| Benefits                       | \$3.87         |  |                                     |
| Taxes                          | \$3.08         |  |                                     |
| PTO, Holidays, Sick            | \$3.22         |  |                                     |
| <b>Total Employee Expense</b>  | <b>\$30.17</b> |  |                                     |
| Real Estate                    | \$2.26         |  |                                     |
| <b>Support</b>                 |                | <b>Total Hourly Rate/Agent</b>                 | <b>Total Hourly Rate/Supervisor</b> |
| Management                     | \$0.85         | \$15.75/hr.                                    | \$18.00/hr.                         |
| Other Support                  | \$2.77         |  |                                     |
| Workstation Expense            | \$1.12         |  |                                     |
| Attrition - 10%                | \$1.51         |  |                                     |
| Productivity                   | \$1.03         |  |                                     |
| Other                          | \$1.00         |  |                                     |
| <b>Total Hourly Rate/Agent</b> | <b>\$40.71</b> |  |                                     |
|                                |                | <b>Cost Savings/Hour*</b>                      |                                     |
|                                |                | <b>\$23.72/Hour</b>                            |                                     |
|                                |                | *Assuming 15 Agent Team using Client Telephony |                                     |

KM<sup>2</sup> Solutions remains the client's sole outsourcing provider and has increased agent headcount threefold, expanded into our Honduras site, and added bilingual support. Our teams consistently outperform all key metrics and continue to set record-breaking months.

### Why KM<sup>2</sup> Solutions?

KM<sup>2</sup> Solutions is an award-winning BPO with over two decades of experience operating an exclusively nearshore strategy throughout the Caribbean and Latin America. The company provides clients with a host of outsourcing solutions, including customer care, receivables management, technical support, sales & marketing, data analytics, and back-office processing. KM<sup>2</sup> Solutions maintains PCI DSS compliance, completes an annual SOC 2 audit, and has a Compliance Management System that aligns with the FDIC.

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