



kōnecta
feel the pulse

Introduction to Kōnecta

May 2026



KONECTA AT A GLANCE

We are a global leader in customer experience (CX) and digital services

By orchestrating a perfect harmony between human ingenuity and digital precision, we redefine what is possible in GenAI-powered user experience (citizen, fan, employee, customer, patient etc.).



109,000+
employees



€2bn+
revenue



40,000+
employees working
from home



28
countries



40+
languages



500+
blue chip clients

You are 500+ across all industries

relying on us to craft
meaningful experiences
to your customers
and employees.

AUTOMOTIVE,
MOBILITY & TRAVEL

FINANCIAL
& INSURANCE

RETAIL &
ECOMMERCE

TELECOMS, MEDIA &
TECHNOLOGY

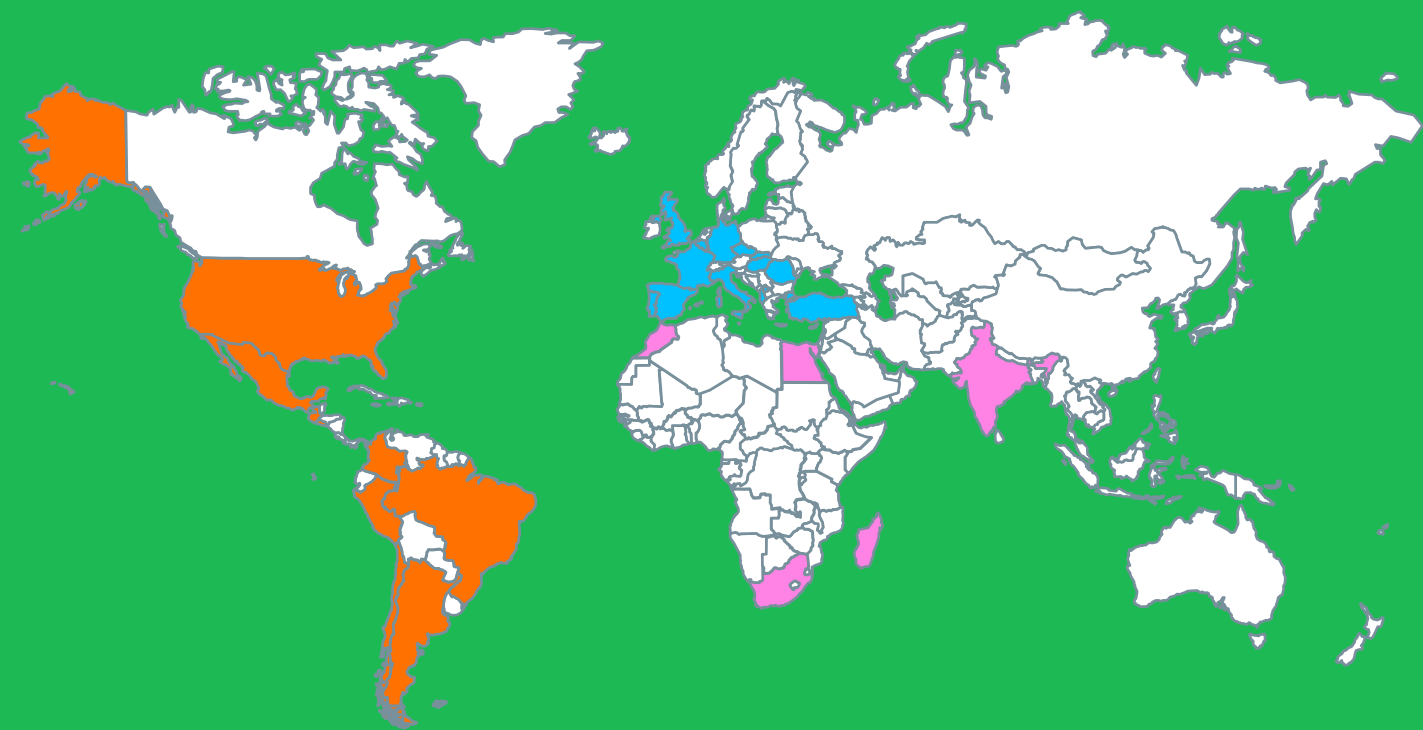
HEALTHCARE

PUBLIC SECTOR

UTILITIES



A leadership position across five continents with best-shoring capabilities



AMERICAS

9 countries
56+ sites

Colombia - 21sites
Peru - 9 sites
Argentina - 10sites

Mexico - 4 sites
Brazil - 8 sites
Chile - 1sites

EISalvador - 1site
Guatemala - 1site
USA - 2 sites

EUROPE

14countries
110+sites

Spain - 34 sites
Italy - 31sites
France - 18sites
Czech Rep - 9 sites

Türkiye - 5 sites
Romania - 6 sites
UK - 3 sites
Albania - 3 sites
Kosovo - 1site

Slovakia - 1site
Germany - 1site
Belgium - 1site
Hungary - 1site
Portugal - 2 sites

MIDDLE EAST | AFRICA | ASIA

5 countries
12sites

South Africa - 1site
Madagascar - 2 sites

Morocco - 7 sites
Egypt - 1site

India - 1site

Forthcoming: The Philippines

MULTILINGUAL HUBS

All along with a comprehensive virtual model to provide best-in-class Work from Home operations

Barcelona
Bogota
Cairo
City
Casablanca
Istanbul

Lisbon

Paris
Tangier

London
Mexico



89%
Employee
Satisfaction

6.0%
Attrition
Industry: 10-12%

94%
Loyalty

+85%
Internal
Promotion

Our technology-driven solutions aim to enhance interactions effectively

AI & GenAI Services

AI/GenAI Readiness and Strategy

Use Case Development & Implementation

Managed AI/GenAI Services & Platforms

Sector-specific Solutions with SLM



Customer Experience

- ❖ Customer care
- ❖ Sales
- ❖ Technical support
- ❖ Back-office services



Digital Marketing

- ❖ Lead generation & appointment setting
- ❖ Digital campaign management
- ❖ Sales conversion



Employee Experience

- ❖ Smart service desk
- ❖ Device-as-a-service
- ❖ Managed workplace services
- ❖ Smart onsite services



Products & Services

- ❖ CX implementation services
- ❖ Cloud enablement services
- ❖ CX engagement suite
- ❖ CX business applications

Advisory & Consulting

CX strategy and design

GenAI assessment and implementation

Change management & training

Data and analytics

Responsible AI

...to deliver seamless customer and employee services.

We offer a full range of end-to-end customer management process and digital outsourcing – including acquisition, retention, customer service, technical support, and collection – all based on a sustainable business model.

AI & GENAI SERVICES

Start-to-finish support to accelerate your AI/ GenAI journey



Customer Experience

Hybrid GenAI agent solutions and AI-enabled innovations for both front- and back-office to revolutionize your customer experience and fit your needs.



Employee Experience

Employee care solutions, from helpdesks to knowledge management, to support and engage your employees and help your business thrive.



Digital Marketing

Outcome-based solutions to boost your sales, improve efficiency and achieve better ROI.



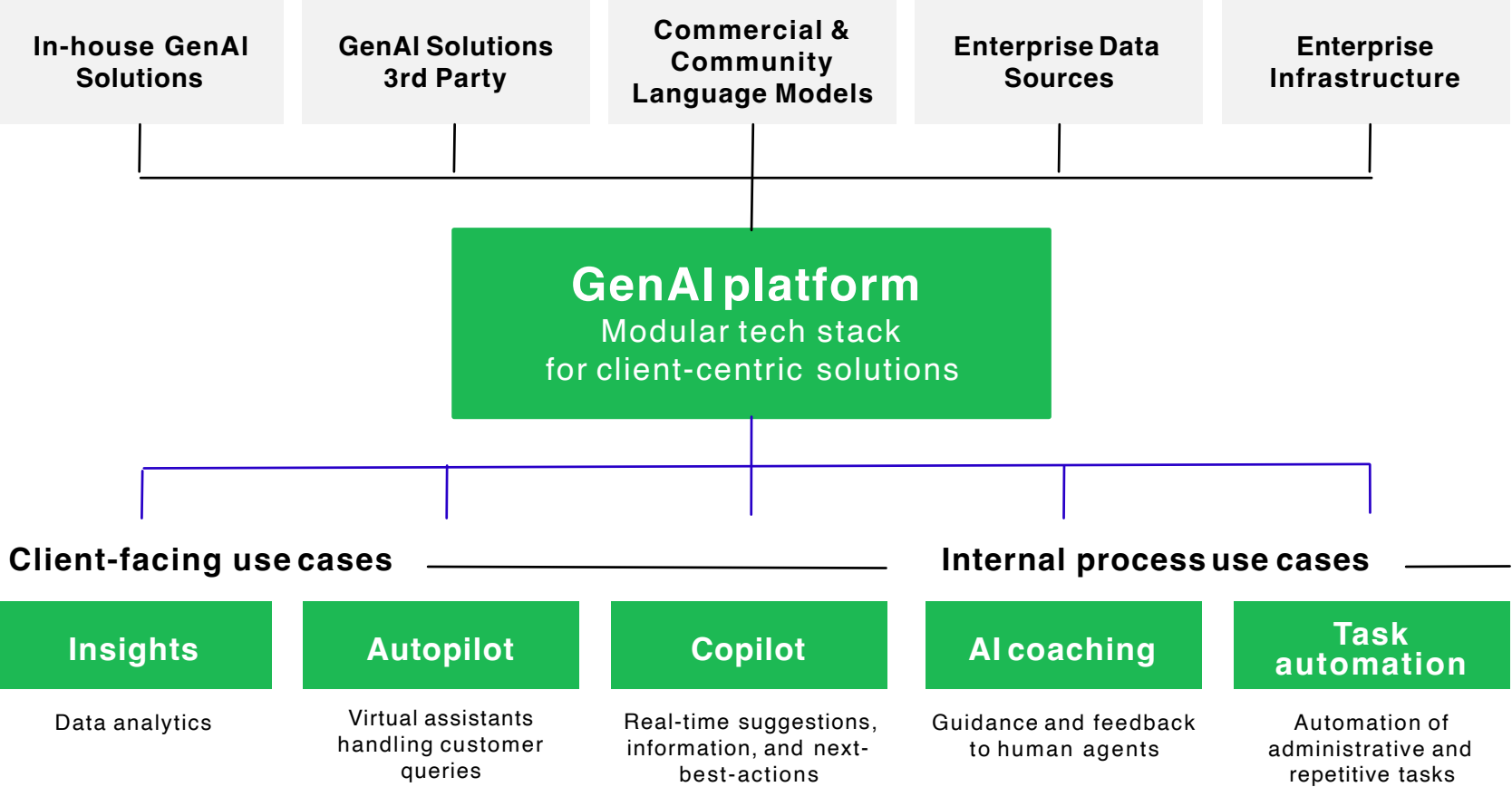
Products & Solutions

Best-in-class solutions and services, from CX automation to analytics, to reinvent your relationships - harnessing our own and third-party innovation.

Agile advice and strategies from service design to technology implementation to process optimization.

ADVISORY & CONSULTING

An open platform to empower agents with GenAI capabilities



Hybrid

Seamless collaboration between human and virtual agents



Open

Open, secure and scalable technology ecosystem



Consistency

Central tech stack for consistent implementation and highest standardization



Scalability

Particularly for the AI models, enabling replicability of assets and maximum scalability



Lowcode/no code service

Democratization of usage, ensuring non-technical colleagues can configure flows

Content

- 01** OUR SOLUTION
- 02** OUR EXPERIENCE
- 03** OUR AI APPROACH
- 04** WHY KONECTA



01

OUR SOLUTION



Our Value Proposition

Subscription Lifecycle Expertise

We manage the full subscriber journey, from onboarding and activation to upgrades, cancellations, retention, and winback. Our operations are designed to remove friction, improve engagement, and ensure consistent experiences throughout the subscription lifecycle.

Retention & Revenue Protection

Customer interactions are treated as revenue moments. Through structured save strategies, personalized conversations, and proactive engagement, we help streaming platforms reduce churn, reinforce value perception, and maximize subscriber lifetime value.

AI-Augmented Operations

AI is embedded across our operations through intelligent routing, automation, agent assist tools, and advanced analytics. This enables faster resolutions, smarter decision-making, and highly personalized subscriber experiences at scale.

Global Omnichannel Delivery

We deliver seamless support across voice, chat, messaging, social, and digital channels, supported by scalable multilingual delivery models that allow streaming platforms to expand into new markets while maintaining service consistency.

Delivering AI-enabled customer experiences designed to protect recurring revenue and strengthen subscriber loyalty.

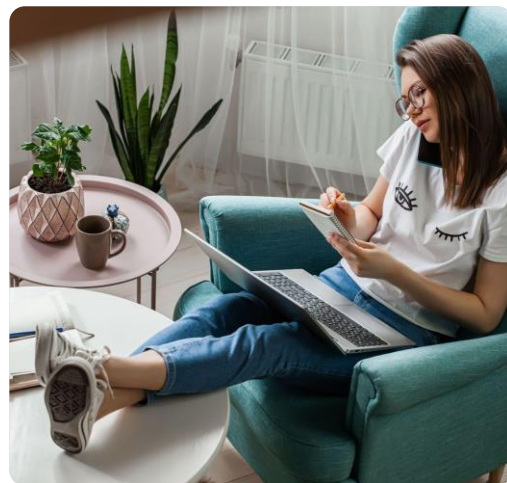
The subscription economy requires a different CX model

Streaming platforms require CX operations built to protect engagement, retention, and lifetime value.



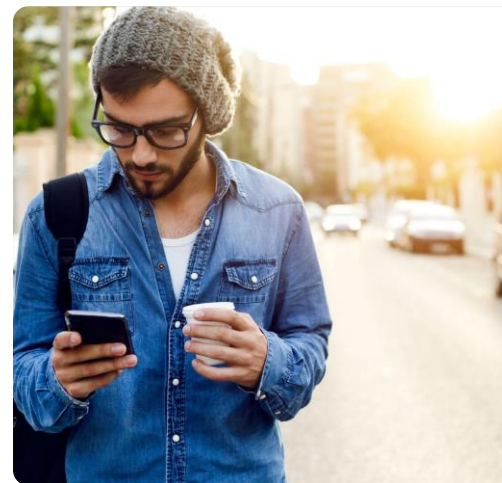
Retention drives growth

Sustainable growth depends on reducing churn and extending subscriber lifetime value. Every interaction is an opportunity to reinforce engagement.



Subscribers expect omnichannel

Streaming audiences move across devices expecting fast, effortless support via chat, messaging, voice, and social — without losing context.



Billing friction drives churn

Failed payments, renewal issues, and access challenges are the highest-risk moments in the subscription lifecycle. Speed of resolution is essential.

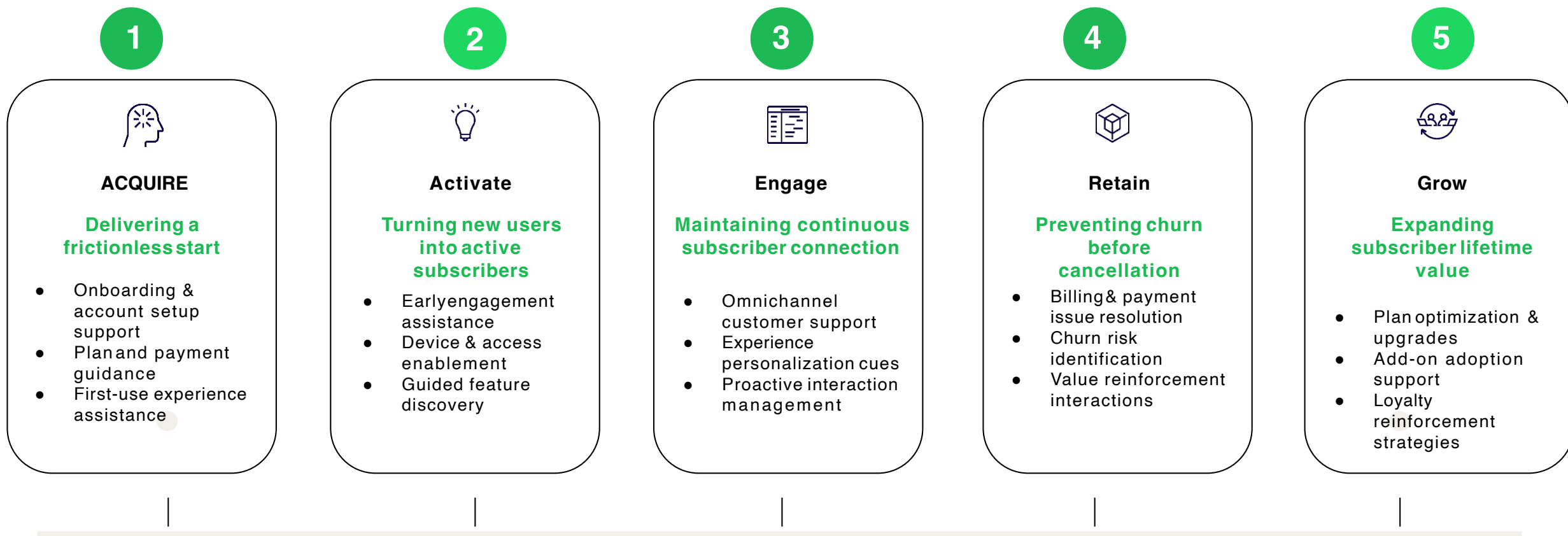


Personalization builds loyalty

Subscribers stay when interactions feel relevant. Data insights and AI-enabled guidance empower agents to deliver experiences that strengthen platform affinity.

How We Manage the Subscription Lifecycle

We support streaming platforms across every stage of the subscriber journey, ensuring engagement, retention, and recurring revenue growth.



Retention is built across the entire subscriber lifecycle.

Churn Reduction & Save Strategies

How We Reduce Churn

We transform customer support into a proactive retention engine designed to protect recurring revenue.

- **Early Churn Signal Detection:** We identify cancellation risk early by analyzing behavioral patterns, interaction signals, and payment friction before subscribers decide to leave.
- **Value-Based Save Conversations:** Agents focus on reinforcing platform value and relevance rather than relying on discounts, turning save interactions into meaningful engagement moments.
- **Personalized Retention Offers:** Retention actions are tailored to each subscriber's context, ensuring solutions feel relevant, timely, and aligned with individual usage patterns.
- **AI-Assisted Agent Guidance:** Real-time AI insights support agents with next-best actions and recommendations that increase save effectiveness during live interactions.
- **Proactive Outreach Programs:** Targeted outreach campaigns address renewal risks, failed payments, and inactivity to recover subscribers before churn materializes.

- **Retention Operations at Scale:**

Konecta transformed retention into a structured operational capability, combining specialized save teams and proactive engagement strategies to reduce voluntary churn and protect recurring revenue.

- **Loyalty-Driven Subscription Retention:**

Through personalized interactions and advisor autonomy, Konecta strengthened customer relationships, improving loyalty and long-term subscriber stability in a competitive subscription market.

02

OUR EXPERIENCE



Operating across multiple Latin American markets, DIRECTV needed to transform customer support into a scalable operation capable of managing high interaction volumes while protecting subscriber retention and service continuity.

Our Approach

Konecta assumed end-to-end ownership of customer operations, redesigning customer journeys and embedding AI-driven analytics, agent copilots, and structured retention workflows to proactively address churn risk and improve interaction efficiency.

What Made the Difference

- Retention integrated into daily operations rather than isolated save teams
- AI-powered insights enabling smarter conversations
- Unified multi-country delivery ensuring consistent subscriber experience

Business Impact

- **7 markets unified under one operating model** Delivering consistent subscriber experience across Latin America.
- **140+ customer journeys managed across all channels** Supporting technical care, billing, digital engagement and retention programs.
- **AI-driven quality model implemented at scale** Enabling faster resolutions, reduced handling times and proactive customer care.
- **100% operational continuity during transformation** Ensuring subscription stability while modernizing the ecosystem.

CLIENT SHOWCASE

NETFLIX

Netflix & Konecta: Elevating CX Across Latin America and the US

Netflix chose Konecta to support its growth in the Spanish-speaking market, relying on our expertise in Latin American customer service, strong cultural alignment, and commitment to customer satisfaction. With agile operations, transparent processes, and early success on key KPIs, we've built a partnership designed to scale with quality.

100%

Achievement of
proficiency targets

<2 months

Taken to exceed CSAT
targets

30%

Decrease in
handling time
since launch



Billing & Payment Experience

Protecting Revenue at Critical Moments

Recover



Failed Renewals Recovery

Automated and assisted recovery journeys reconnect subscribers after payment failures before disengagement begins.

Support



Account Access Support

Fast identity resolution and access recovery prevent frustration during high-risk moments impacting retention.

Update



Payment Method Updates

Guided payment updates and frictionless flows reduce involuntary churn caused by expired or declined methods.

Protect



Subscription Continuity Protection

Grace periods, smart retries, and proactive communication maintain uninterrupted subscriber experience.

03

OUR AI APPROACH



AI working across the subscriber journey



AI ROUTING

Intent detection & predictive routing

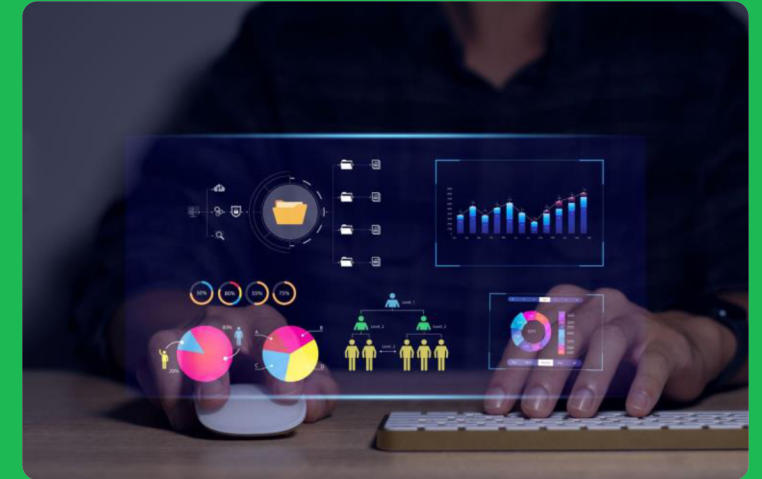
Connect subscribers to the right expertise instantly, reducing effort and resolution time.



AGENT COPILOT

Real-time guidance during live conversations

Recommends next-best actions, retention responses, and knowledge prompts in the moment.



AUTOMATED QUALITY & INSIGHTS

Analytics that identify churn patterns

AI-driven evaluation of interactions fuels continuous operational improvement.

AI doesn't replace agents — it amplifies retention outcomes.

Consistent experience at global scale

Omnichannel delivery + global reach, without compromising quality

Voice

Chat

Subscriber

Messaging

Social

Digital support

Subscribers move between channels freely. Context, personalization, and service quality remain consistent across every interaction.

MULTILINGUAL DELIVERY

Native-language support aligned with regional subscriber expectations and cultural nuances.

DISTRIBUTED GLOBAL HUBS

Strategic locations across LATAM, Europe, and Africa ensure resilience and flexibility.

FOLLOW-THE-SUN MODEL

Continuous global coverage enabling seamless operations and peak demand management.

RAPID RAMP CAPABILITY

Agile recruitment, onboarding, and training frameworks support fast market expansion.

Subscribers choose the channel. Experience stays consistent. We scale when Spotify grows.

Business Transition and Onboarding Approach

Pre-Onboarding Preparation

Establish a strong foundation for knowledge transfer and operational readiness.

- Client Kick-Off Meeting
- Process Mapping
- Technology Assessment
- Compliance & Security Review

Pilot Launch (SME Launch)

Begin operations on a small scale to validate readiness. Overhead to “live the life”.

- Soft Launch
- Performance Monitoring
- Feedback Loop

Continuous Improvement

Optimize operations through data-driven insights and innovation

- Performance Reviews
- Process Optimization
- Customer Feedback Integration
- Innovation Initiatives

STEP II

STEP IV

STEP I

STEP III

ONGOING

Knowledge Transfer & Subject Matter Expert (SME) Training

Absorb operational knowledge to mirror and support existing processes

- SME Sessions
- Documentation Development
- Technology Training
- Tailored Training

Full Operational Launch

Scale operations to full capacity with continuous quality checks

- Gradual Scaling
- Quality Assurance
- Real-Time Reporting

Business Transformation

Drive transformative change with strategic, data-informed innovation

- New services
- Technology-driven value creation
- Further elevation of quality and performance
- Review of offshoring options
- New partnering frameworks
- Cross-Vendor Partnerships

04

WHY KONECTA



Why Konecta for Spotify

- **Proven streaming & subscription expertise**
Experiences supporting global entertainment and subscription platforms with complex subscriber ecosystems.
- **AI-enabled subscriber engagement**
Human expertise amplified through embedded AI, automation, and data intelligence.
- **Partner mindset focused on growth**
We operate as an extension of your teams, aligned to long-term engagement and performance outcomes.
- **Retention-first operating model**
Customer support designed to protect lifetime value and recurring revenue.
- **Global scalability with cultural alignment**
Flexible global delivery combining operational scale with local subscriber understanding.

"We transform subscriber interactions into lasting engagement and sustainable growth."

thank you

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WHO WE ARE

We are experience makers.

We seamlessly hybridize human and AI agents to make every experience feel special **for our clients' customers and employees.**

Our **diverse, multicultural 100,000+ strong** team brings a wealth of perspectives, ensuring that every experience is tailored, authentic, and meaningful.

With **+25-year experience**, we are uniquely positioned to deliver end-to-end experience services and solutions to meet the needs of our clients.

Katalyst 2028, our strategic 3-year plan to become a GenAI-powered company

We foster a holistic ecosystem where human ingenuity and advanced GenAI work together to create impactful and personalized interactions.

01

Redefining CX for the future

by deploying advanced AI solutions and providing end-to-end support through strategic partnerships.

02

Driving the transformation with Konecta Digital

by scaling innovative offerings, incl. GenAI, system integration, employee experience solutions, and cybersecurity, but also serves as a trusted advisory and consulting partner.

03

Expanding global reach

by reinforcing our presence in established markets where we are already a leader like Spain, Italy, Colombia, Argentina and Peru, while expanding into high-potential regions such as the U.S., Middle-East, and South Africa.

04

Upskilling for the digital era

by equipping our employees with trainings in advanced AI and GenAI tools, and internal AI solutions, such as virtual assistants and AI coaches.

Our people are the *Pulse* of our business



DIVERSITY & OPEN CULTURE

We believe that diversity and open management can together encourage delegation and empowerment, develop collaboration, boost creativity and innovation and increase agility.



TALENT ATTRACTION & ACQUISITION

We invest heavily in the recruitment process (candidate research, interviews, simulation, etc.) to find the best profiles, passionate people and ambassadors of Konecra.



DEVELOPMENT, RECOGNITION & RETENTION

We help our people find their purpose and develop their employability through best-in-class training and career development programs. We recognize their performance with rewards and promotion.



WELLBEING & QUALITY OF LIFE AT WORK

Our people feel good at work because we offer them a modern work environment, we are in tune with their passions. We encourage healthy or artistic hobbies, and we create a general sense of community.

We are guided by our values...

We are future-ready

We keep our human and digital skills future-proof to deliver seamless and scalable experiences.

The team is our spirit

We are a collective house of positive collaboration, driven by a strong culture of experience.

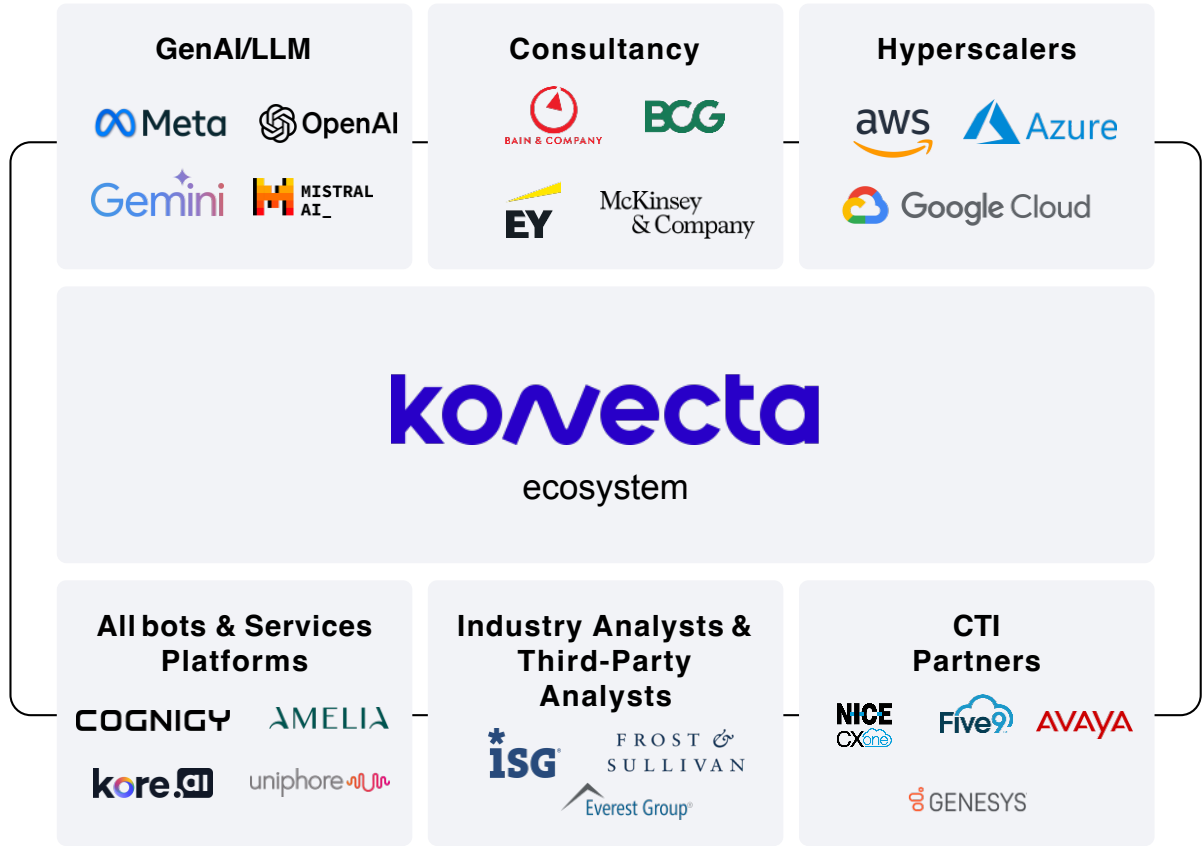
We disrupt with purpose

We aim to transform the industry by creating solutions that inspire progress, empower communities, and leave a positive mark.

We are reliable game-changers

We are determined to revolutionize the world of experiences, with reliability and resilience.

We rely on dynamic tech and strategic partners to deliver the best



We join forces with global leaders, innovators and future leaders across all elements of hybrid experience to provide you with agile solutions, unleash your potential, and open up new worlds for you.

We are leader in the Customer Experience Management



Leader in CX management EMEA
Peak Matrix®2025

Major Contender in CX
management Americas Peak
Matrix®2025

Leader in B2C Sales Services
Peak Matrix®2025



Leader in the 2025 Frost Radar™:
Customer Experience Management
Outsourcing in Europe

Leader in the 2025 Frost Radar™:
Customer Experience Management
Outsourcing in Latin America



Best Place to Work 2024 Albania
(5th year), Romania, Africa and
Europe, Morocco (8th year).

Great Place to Work 2024
Argentina, Colombia & Peru.

**With all
certifications
required**

ISO 9001
Quality
Management
System

ISO 27001
Information
Security
Management
Systems

ISO 22301
Business Continuity
Management

PCI-DSS
Payment Card
Industry Security
Standard

We shape tomorrow's customer experience, responsibly

We strive to integrate sustainability across our business model and value chain, setting our company up for long-term success and resilience.

ENVIRONMENTAL

Aligned with the Science-Based Targets Initiative, we reduce and offset our emissions, while cutting resource consumption and shifting to renewables.

SOCIAL

We foster diversity, equity & inclusion, with a strong focus on professional development, health, safety and wellbeing, underpinned by ethical behaviors.

GOVERNANCE

Through our robust compliance program, we adapt to the evolving needs of our dynamic business while considering the interests of customers and stakeholders.

Konecta Foundation

Created in 2005, it promotes projects for people and communities in four domains: Employability, Volunteering, Innovation, Social & Community Development

+220,000

lives changed

+20,000

engaged employees,
social leaders,
strategic partners

+18 M€

invested in
charities

+16,000

vulnerable people
with new
employment and life
opportunities

Sustainability

Sustainability is essential for business success. We integrate it into our business model and value chain, building the foundations for a brighter future and ensuring long-term resilience. We translate our sustainability principles into practical actions to enhance human wellbeing and protect the environment.



We enable every person to reach their potential

We help our people to thrive by enhancing passion, creativity and performance. We create spaces where every voice is heard, and provide equal access to opportunity and support.



We operate as a responsible business

Our governance framework and business model are grounded in ethical principles of transparency, security and integrity. We implement best practices to build long-term success, safeguard all our stakeholders, and be a force for good.



We're helping to build climate resilience

We feel the challenge. We are committed to implementing an ambitious strategy to cut our carbon footprint, increase resource efficiency while balancing today's needs with future generations.

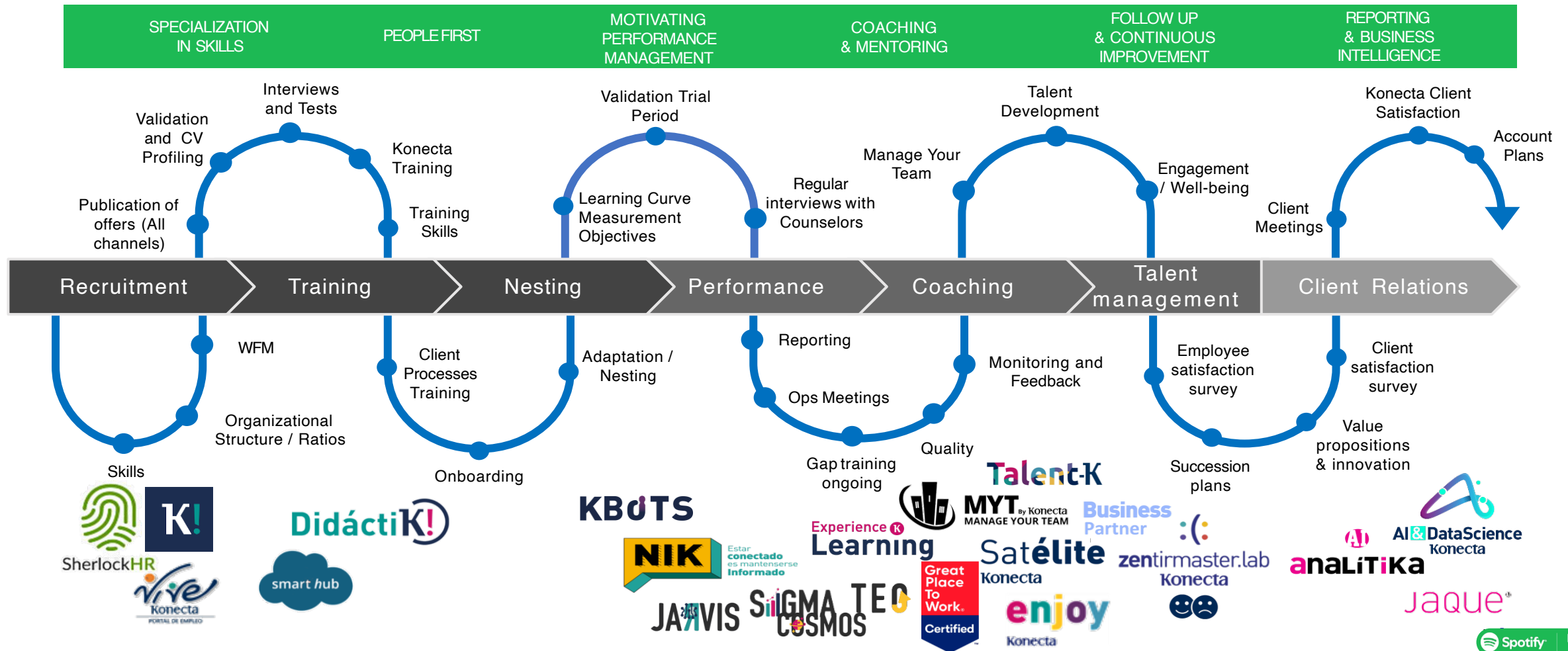


We contribute to our local communities

For broader sustainable development, we're working to help empower under-represented groups, build social inclusion and inspire our people to feel connected through meaningful social change.

Operating Model - Client & employee at the center

25 years of experience has given us the expertise to craft a state-of-the-art operating model that complies with the most rigorous standards and new trends to effectively serve our clients' needs.



Recruiting & Onboarding



Language Assessments



Konecta assesses the candidates based on the CEFR evaluation standards.

We utilize a multi-faceted approach to assess English proficiency levels to ensure a comprehensive & accurate evaluation, moving beyond simple self-assessment or subjective impressions:

Standardized Tests

We leverage internationally recognized standardized tests, which provide objective and comparable measurements of language skills (listening, reading, speaking, and writing). These tests are aligned with the CEFR framework, allowing us to accurately place candidates within the A1-C2 proficiency levels.

Customized Assessments

In addition to standardized tests, we have developed customized assessments tailored to specific job requirements. These may include:

- **Role-Playing Scenarios:** Evaluating communication skills in realistic work-related situations.
- **Written Communication Tasks:** Assessing writing proficiency through emails, reports, or other relevant documents.
- **Presentations:** Measuring presentation skills and the ability to convey information effectively.

Interviews

Structured interviews are conducted by trained personnel that provide insights into a candidate's communication skills, fluency, and ability to interact in a professional context.

Training & Development

Our tailored Training Programs to develop our people as your brand ambassadors

Memory anchoring

INDUCTION TRAINING

Konecta induction and customer management fundamentals
Core business induction (brand values, products, processes and tools)
Validation quiz

Confidence building

NESTING

Dedicated nesting environment where agents are closely supported
(1 week)

Expertise and autonomy reinforcement

CONTINUOUS TRAINING

Continuous training through short pills
Ad hoc specialist training (customer excellence, new channels, leadership)
Day-to-day coaching & briefing

Community of certified training experts, specialized in the **design and the delivery of customized** training programs for each industry, brand and service

Blended training programs that smartly combine various **modern learning techniques** from a mix of theoretical and practical courses (role-plays, serious games ...) to face-to-face and virtual classes

Latest generation digital learning solutions with highly **engaging and entertaining content for an optimal learning experience** (e-learning, microlearning, ...)

“Train people well enough so they can leave, treat them well enough so they don’t want to.”