



Leaptree Explained

Why work with Leaptree.AI?



Reasons to choose Leaptree.AI



Simple, no-code setup

Easily build and configure custom scorecards, out-of-the-box. Get started in minutes.

salesforce

Built Inside Salesforce

Get started without the need for APIs or hassle with external integrations. Built inside Salesforce for ease, data compliance, and security.



Technical Support

Get highly detailed, expert support when you need it. Our Leapforward onboarding programme means you'll be up and running in no time.



Major Savings

Free-up valuable time from your Call Center Managers, QA and CX teams.



Customer Success

The efficiency gains brought about by Leaptree Optimize and its ability to streamline our quality workflows, allow me to focus on what matters most: the development and success of my team.



Gale Largy
Employee Development
Manager



Leaptree Optimize has given me back days worth of time. I'm now able to allow my QA Specialist to focus on scores and I can focus on growth and scaling.



Kate Keipp
Menu QA Lead of
Restaurant
Operations



LeapTree has been a valuable asset in serving our Quality Assurance and CSAT review needs. Their platform is user-friendly and has helped us streamline our processes, leading to increased efficiency and customer satisfaction. Overall managing and adjustments have been straight forward and served our needs.



Jon Wood



Enabling Your Success



LeapForward Onboarding

Hassle-free, guided onboarding to help get you started. This includes building out a custom product configuration, training, a rollout checklist, and commit to go-live.



Premium Advisory Services

Once you're up and running, get hands-on expert advice from a technical product specialist to get the most from Leaptree for your particular set up.



Core Product Support

Hit an issue or bug with the product? Log a ticket with our Support desk and we'll get it resolved ASAP.



Professional Services

Get the help you need to implement best practices for your specific project from our team of Leaptree product and Salesforce experts.



Knowledge Base

Access the Leaptree Knowledge Base for documentation, video tutorials, and product information webinars.



Leaptree Blog

Read the latest articles on RevOps, Sales, CX, and QA on our blog.



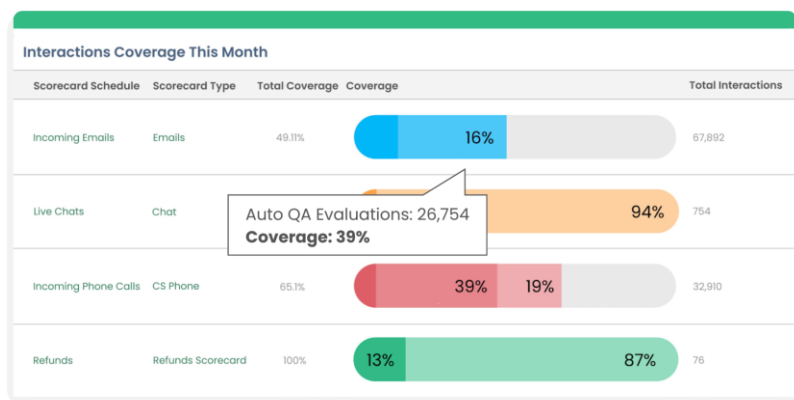
Fantastic Features

Fantastic Features

AI That Transforms Contact Center QA.

With Leaptree Optimize, AI handles the heavy lifting of quality assurance automatically auditing every call, chat, and email to uncover trends, risks, and performance gaps before they impact CX.

Teams can focus on improvement instead of administration, using AI insights to coach smarter, ensure consistency, and scale compliance effortlessly. The result? Total QA coverage, reduced workload, and measurable CX impact — powered by AI and built entirely in Salesforce.



Get vital insights with smart QA scorecards.

Evaluate, empower, and improve agent performance with intelligent QA assessment automation (no developers needed!). Build powerful, dynamic QA scorecards in the blink of an eye. Leaptree Optimize runs 100% within Salesforce for easy configuration and without the hassle of external APIs and integrations.

QA Manager Overview

My Pending Scorecards

Scorecard Name	Case	Agent Name	Scorecard Type
Scorecard 00145	012356	Katie Kay	Complaints

New Task

Assigned To: Katie Kay
Related To: SC 00145
Subject: CR Training
Due Date: 01/24/2023

Scorecard 00145

Complete The Evaluation

1. Did the agent introduce themselves?
☒ Yes ☐ Somewhat ☐ No ☐ N/A

Comments

2. Did they follow the script?
☒ Yes ☐ Somewhat ☐ No ☐ N/A

Comments

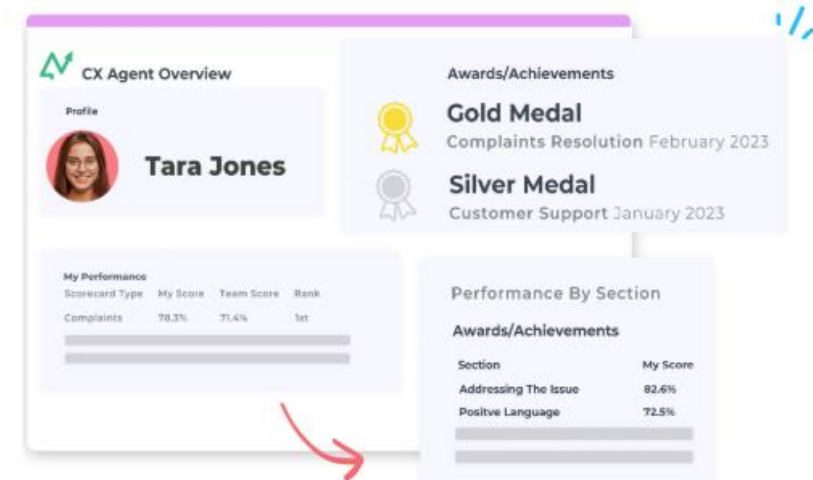
Automate and enhance your CX quality management program.

Access fully customizable CX QA dashboards and advanced reports, all within Salesforce. Identify areas that need attention at a glance. Automate whatever you need to monitor from phone calls, web chats, email threads, and Zoom calls. Cut time spent on QA assessments by 75%!



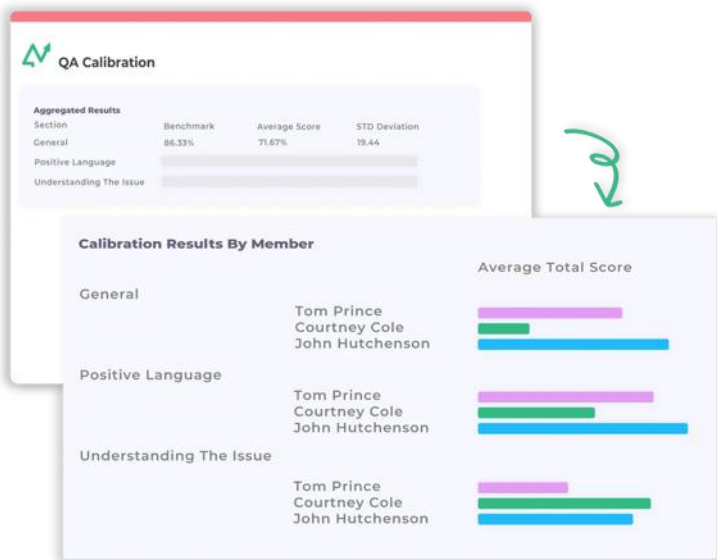
Drive Performance with CX Gamification.

Keep your contact center team engaged and motivated with built-in gamification. Leaptree Optimize lets you set up leaderboards, badges, and game-like challenges that make great performance visible and rewarding. When agents can see their progress, they strive to win.



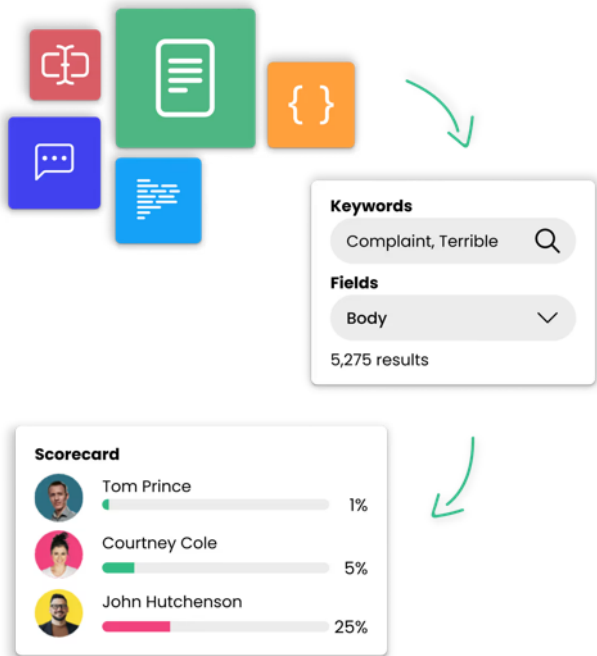
Calibrate for consistent evaluations.

Use QA Calibration to compare evaluator responses and ensure that scorecard markings are standardized, fair, and consistent – no matter who's doing the scoring.



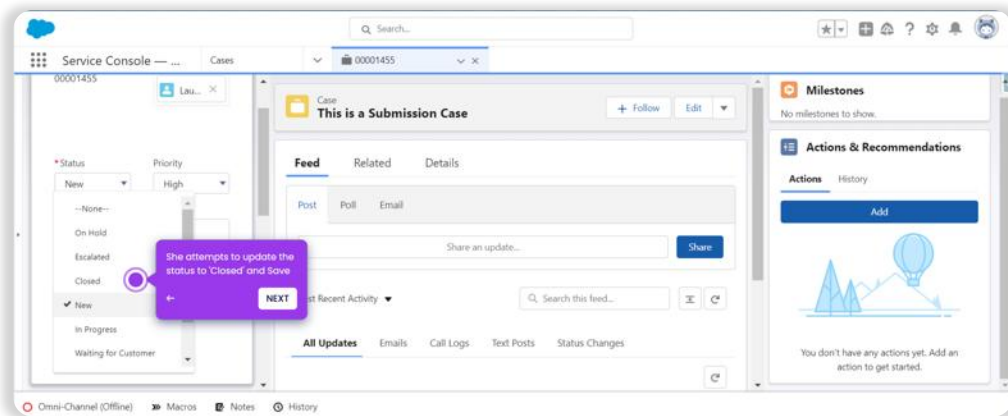
Large Text Analysis.

Sift through a vast ocean of customer interactions to identify CX issues, be it through call transcripts, emails, tasks and web chats.



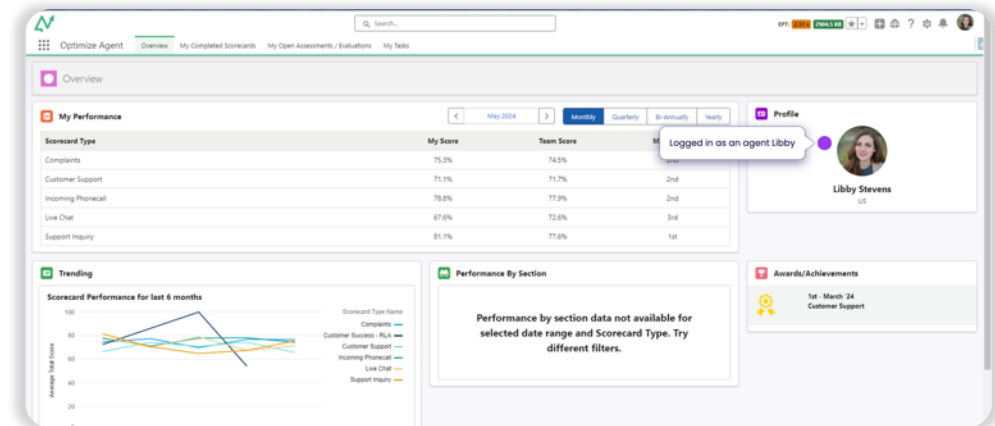
Skills Based Approvals.

Elevate CX Quality Management with automated approval control based on skill level. Take advantage of Dynamic Skills Assessment and Enhanced Efficiency to boost Skills based approvals. Extend to include Document Approvals.



Self Assessments.

Elevate your insights and transform customer interactions. Empower your teams to take charge of their growth by enabling them to self-assess their engagements effortlessly. Foster a culture of accountability and awareness as team members gain insights into their performance. Drive greater buy-in and alignment with organizational goals.



Recommended Learning Actions.

Revolutionize CX QA by dynamically identifying skills gaps, prompting proactive professional development for elevated customer support standards.

Empathy Skills Module

Assign To: Ava McAllister

Due Date: 27 Apr 2026

REASON: "COMPLAINT ACKNOWLEDGMENT & EMPATHY" SECTION

This self-paced module focuses on developing empathy in customer interactions. Agents will learn techniques to recognize customer emotions and respond with understanding and compassion. Role-playing simulations and real-world case studies will help reinforce empathetic concerns. Agents will be able to better acknowledge customer concerns.

Effective Complaint Acknowledgment

Assign To: Ava McAllister

Due Date: 27 Apr 2026

REASON: "COMPLAINT ACKNOWLEDGMENT & EMPATHY" SECTION

In this interactive training session, agents will practice the steps required to properly acknowledge customer complaints. The session covers active listening, clear communication, and validating customer feelings. Personalized feedback will be provided to hasten their approach. Mastery of these

Upsell and Reward.

Reward high performers with bonus structures, incentivize support teams to drive upsells, and create group or individual reward programs that keep agents motivated and aligned around better customer outcomes.

Performance Against Targets				2026 ▲
Target Name ↑ ▼	Target Period ▼	Performance ▼	Target ▼	
FY2026 Average CX QA Sc...	Jan 1 - Dec 31	92%	80	
FY2026 Average NPS	Jan 1 - Dec 31	101%	71	
FY2026 Software Upsells	Jan 1 - Dec 31	11%	\$100k	
FY2026 Support Upsells	Jan 1 - Dec 31	80%	\$50k	



Book a Demo today

[Leaptree.com](https://leaptree.com)

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