

Five9 Adapter for Salesforce

Power an intelligent, end-to-end agent and customer experience with a single Salesforce desktop

What is It?

Five9 places the combined power of Five9 and Salesforce at your fingertips. With it you can capture, view, manage, and share every customer interaction. We do this through an intuitive user interface throughout the customer journey. Organizations using the combined solution utilize the power of real-time customer data to drive greater business results – increasing agent productivity and improving customer service.

"We've found Five9 to be exceptional in their knowledge of contact centers and especially their knowledge of Salesforce and contact centers."

Davo Muttiah, Change Manager, CARFAX

One Platform for a Seamless Experience

Five9 delivers customer intent and journey context, giving agents a complete picture of each problem before they engage the customer. Five9 also puts the customer's entire contact history at the agent's fingertips so they can better understand the customer's needs and better fulfill their expectations.

Single-Pane Agent Solution

Your agents no longer have to switch between applications and Salesforce to address customer concerns. Five9 provides a single consistent experience optimized for your Salesforce environment, minimizing the learning curve and empowering agents to focus on the customer rather than the screen.

Information is retrieved in real time based on the customer's telephone number or other identifiers customers may provide in the IVR. Customer information is then delivered to the agent prior to the call making it easy for the agent to deliver personalized service and maintain the customer journey.

Embedded Supervisor Solution

Five9 embeds key supervisor capabilities into Salesforce to make it easy for administrators and supervisors to play an active role in the quality of ongoing operations with agents. Supervisors can configure events such as time on break or monitor agents and launch the entire Five9 supervisor desktop for more involved situations.

Route Customer Interactions to the Right Resource – Anywhere in the World

The Five9 Intelligent Cloud Contact Center has intelligent routing capabilities that give your company control over inbound interactions including voice, email, SMS, chat, and social messaging apps. With Five9 skills-based routing and customer information from the Five9 Salesforce integration, you can determine customer intent and route the customer to the right resource to help them continue their customer journey.

In addition, these data elements can be delivered to the agent so they understand customer intent and can begin helping from the first moment of contact.

Omnichannel

Five9 screen pops blend directly into the Salesforce environment, giving agents a complete picture of each problem before they engage the customer. Five9 also puts the customer's entire contact history at the agent's fingertips so they can better understand the customer's needs and better fulfill their expectations across voice, email, SMS, chat, video, and social messaging apps.



Works With

- Service Cloud
- Sales Cloud
- Lightning
- Classic/Tab
- Console

Five9 and Salesforce Features

Omnichannel

- Voice (inbound/outbound)
- Self-Service (IVR/IVA)
- Messaging (Chat, SMS, Social)
- Email
- Mobile

Routing

- Federated routing
- Delegated routing
- Skills-based routing
- Use of Einstein for lead qualification and sentiment analysis

Agent Desktop

- Single-pane agent desktop
- Configurable "Screen-pop"
- Click-to-dial functionality
- Call history and recording
- Interaction handling controls such as priority over preview, pending state, voicemails, and more
- UC integration
- Single sign-on

Supervisor Desktop

- Real-time agent monitoring
- Embedded supervisor desktop
- Omnichannel visibility and monitoring

Outbound

- Predictive, power, and preview dialing
- Synchronization of customer lists and data
- Service and sales campaigns driven by Salesforce, Five9, and Einstein insights

Workforce Optimization Connector

- Pre-built integration
- Recorded interactions
- Transcript captures of digital channels
- Collect handling data

Einstein Bots

Bots are helpful for easy tasks like password reset and checking your account balance, however they can also be a great way to determine why your customer is contacting you. With Einstein Bots you can gather information and then intelligently escalate to a voice call or chat using Five9 Engagement Workflow to get to the best agent for more detailed assistance. Once connected to the agent, Five9 uses information gathered by the bot and Engagement Workflow to offer the agent a next-best-action. This enables the agent to quickly and efficiently resolve the customer's issue.

Lightning Flow

Five9 has support for Salesforce Lightning Flow which is a Salesforce product to help agents automate complex workflows. Workflows that previously took minutes to complete and hours to teach can be simplified with Salesforce Lightning Flow, reducing agent training time and speeding up the work. Five9 uses Lightning Flow to push key customer context gathered in self-service, from Salesforce, or from the agent interaction into Lightning Flow to further speed up time to resolution.

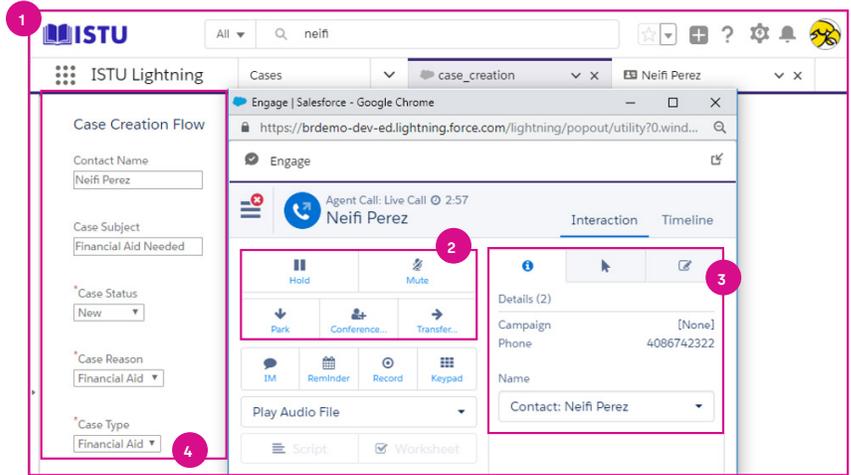
Powerful Outbound Dialer

Integrated into Salesforce, the Five9 solution brings powerful outbound dialer capabilities to bear for your sales organization. The Five9 Predictive Dialer automates outbound dialing and maximizes the amount of time your agents spend talking to real prospects and customers.

Five9 supports predictive, power, progressive, preview, and TCPA manual touch dialing.

List Synchronization

With its list sync capability, Five9 synchronizes data from Salesforce to Five9. Dial lists created in Salesforce are updating during an outbound dialing campaign. This keeps your operations synchronized and your customer records up-to-date so everybody is on the same page regarding customer communication. When clients add, modify, or remove leads from a specific Salesforce campaign, Five9 automatically reflects the changes in the corresponding dialing list.



Streamline Sales Operations

Leverage Einstein for lead scoring and sentiment analysis and utilize that data to better route interactions, execute outbound campaigns, and inform sales representatives on the next-best-action.

Workforce Optimization

Five9 offers an all-in-one approach to the contact center and workforce optimization (WFO) software. We offer a native Five9 solution and partner with industry leading WFO vendors to provide market-leading services, features, and impact for our customers. These solutions are integrated and offered as part of the Five9 platform.

Better Insights

Five9 supports Einstein Analytics making it straightforward to pull data from Five9 into Einstein Analytics to give you a holistic view of your customer service and sales operations.

Contact center managers can create customized reports at regular intervals or on an ad hoc basis in real time. Five9 provides powerful analytics that keep everybody on the same page. Agents can understand business expectations and their performance. Supervisors can use real-time data to adjust queues and make smarter, more informed decisions.

Learn More

To schedule a live demo or find out more information, visit www.five9.com or call **1-800-553-8159**.

1. Single-pane seamless desktop
2. Full phone controls
3. Configurable customer context from self-service
4. Lightning Flow with customer intent and context provided

Your organization name
Your org. contact information 1
Your org. contact information 2



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About Five9

Five9 is an industry-leading provider of cloud contact center solutions, bringing the power of cloud innovation to more than 2,000 customers worldwide and facilitating more than six billion call minutes annually. The Five9 Intelligent Cloud Contact Center provides digital engagement, analytics, workflow automation, workforce optimization, and practical AI to create more human customer experiences, to engage and empower agents, and deliver tangible business results. Designed to be reliable, secure, compliant, and scalable, the Five9 platform helps contact centers increase productivity, be agile, boost revenue, and create customer trust and loyalty.

For more information visit www.five9.com or call **1-800-553-8159**.

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