

# Five9 Virtual Contact Center Suite

Feature Guide

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## Overview

The Five9® Virtual Contact Center (VCC) provides everything you need to run a powerful inbound, outbound, or blended contact center. It gives you everything you expect in a feature-rich, on-premise system without all of the hardware, software, and equipment to purchase and maintain.

Five9 VCC offers powerful automated dialers to help you make more customer connections and drive more sales through outbound voice campaigns. It also provides a comprehensive suite of services for inbound customer service and support, including Five9 Automatic Call Distribution (ACD), and Five9 Interactive Voice Response (IVR).



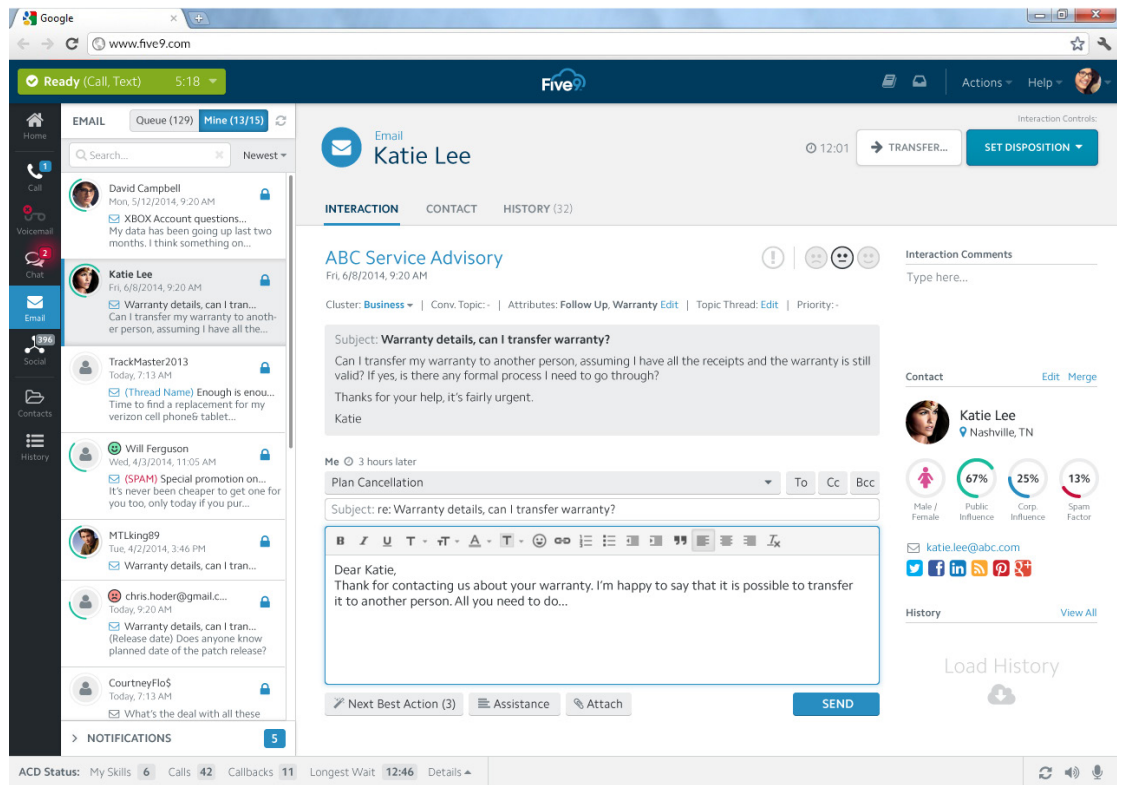
Five9 VCC offers a unique mix of inbound and outbound capabilities that work together seamlessly to create Active Blending. With Active Blending, agents can switch to outbound calls on a call-by-call basis during inbound traffic lulls, increasing the number of productive contacts-per-hour by each agent. You can also configure business rules to schedule automatic outbound follow-up calls for things like “thank you” calls or to follow up on abandoned calls or incomplete orders.

In addition to inbound, outbound, and blended services for voice interactions, Five9 VCC also enables you to engage with your customers through native applications for social, mobile, email, and chat customer engagement. These applications are all powered by a set of intelligent technologies called Five9 Connect™. Five9 Connect includes a Natural Language Processing (NLP) engine to eliminate spam, categorize interactions, and determine sentiment. It uses a business-rules engine to prioritize and route interactions to the appropriate agent and powers a unified suite of agent tools that allow agents to move seamlessly between voice, social, email, and live web chat interactions.

## Five9 Agent Desktop Plus

Five9 believes that when agents are empowered with sophisticated tools and easy-to-use systems, those agents become your secret weapon to improve customer experience and fulfill your brand promise. You'll see the results in the form of increased customer satisfaction and meaningful productivity gains. The Five9 Agent Desktop Plus empowers agents by:

- Providing everything they need in a single screen
- Delivering rich customer context and insights
- Guiding agents with knowledge and through issue resolution



## Feature

## Benefit to You

### Intuitive, Modern Design

Uses the latest HTML5/JavaScript web interface design techniques to provide a contemporary look and feel and a streamlined agent experience. It also boasts a very intuitive interface combined with a universal transaction model that is designed so each channel is familiar to the agent.

Helps to reduce training costs and speed up onboarding of new agents.

### Multichannel Readiness

Gives agents the ability to support, interact, and switch between all media channels through an easy-to-use, unified interface.

Enables agents to easily engage with customers over the phone, via email, through chat and through social networks.

### Unified Multichannel History

Gives agents a unified history of all of their multichannel customer interactions.

Your agents can pick up the conversation where they (or another agent) left off, preventing them from having to ask the same questions over and over again.

### Agent Home Page

The agent home page gives the agent a quick summary of the information they need to start the day. Agents can see, at a glance, important metrics like number of calls in queue, number of voicemails, and number of interactions such as social inquiries, chats, and emails.

Improves multichannel agent efficiency.

Feature	Benefit to You
<p><b>Channel Context</b></p> <p>Five9 Agent Desktop Plus provides the relevant content and tools to help the agent complete the task at hand. For example, when an agent is responding to an email, the user interface (UI) automatically adjusts to include all the relevant email response controls while removing controls related to other channels.</p>	<p>Helps to focus the agent on the interaction at hand, making it fast and easy to complete tasks.</p>
<p><b>Priority Over Preview</b></p> <p>Prioritizes calls and skill voicemails over outbound preview call.</p>	<p>Ensures that higher priority calls and voicemails get handled first.</p>

## Five9 Voice Features and Benefits

### Outbound Voice Features

Whether it's to support an inside sales team or a contact center operation, the Five9 Outbound Contact Center offers robust sales productivity and lead management tools so you can accelerate the sales process:

- Reach more prospects
- Qualify more leads and grow your pipeline
- Respond immediately to hot leads captured from your website and lead providers
- Close more sales
- Achieve revenue growth

### Sales Automation Capabilities

Feature	Benefit to You
<p><b>Predictive Dialer</b></p> <p>Automatically manages the pace of outbound calling based on the applicable call abandonment limit as well as real-time and historical statistics to predict when reps will finish current calls.</p>	<p>Minimizes idle times and maximizes lead generation activities of agents and inside sales teams to fill your sales pipeline.</p>
<p><b>Progressive Dialer</b></p> <p>Provides a variable calls-to-agent ratio that along with the call abandonment limit will determine how many calls to place as reps become ready for calls.</p>	<p>For smaller teams and campaigns, the Five9 Progressive Dialer delivers similar productivity benefits to predictive dialing.</p>
<p><b>Power Dialer</b></p> <p>Continuously dials at a fixed call-to-agent ratio that determines how many calls to place as reps become ready for calls.</p>	<p>Typically used for business-to-business calls, the Power Dialer can provide maximum productivity while ensuring that an available rep can handle each call.</p>

## Preview Dialing

Presents contact records to the sales rep in advance of the rep placing the phone call.

Great for sales-oriented contact centers or for immediate response to hot leads from a web conversion, offering more personalized customer engagement.

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## Lead Management Tools

### Feature

### Benefit to You

#### Calling Lists

Import, update, rename and remove calling list records as your campaign needs change.

Five9 provides complete flexibility to keep your customer contact database up to date.

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#### Campaign and List Management

Multiple campaign and list management capabilities:

- Scheduling list updates from a FTP server
  - Website and CRM software integration to automatically synchronize records with a Five9 calling list
  - List priority and sorting to define the order in which records are dialed
  - List ratios for calling records from multiple lists at specified frequencies
  - Contact filtering of call list based on any contact field
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Five9 gives you advanced productivity tools to streamline your inside sales and outbound contact center campaigns throughout the sales process, so you can improve campaign results and generate increased revenue.

#### Vertical and List Penetration Dialing Mode

Process a calling list quickly using List Penetration Mode to dial the first phone number for each contact record, or use Vertical Dialing Mode to call all numbers in each contact record before proceeding to the next record in the list.

Multiple dialing modes give you the flexibility to follow your measure for productivity.

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#### Local ANIs

Gives your campaign a local presence to increase the rate of answered calls.

Increases your opportunities for conversion by giving your campaign a local presence.

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#### Web Callback

Automatically gathers lead records from websites, web forms or another lead management application and inserts records into the Five9 call list for immediate sales follow up.

Promotes faster lead response times to increase your sales conversions.

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#### Real-Time DNC List Management

Import in-house “Do Not Call Lists” and capture real-time DNC list requests from your contacts after any phone call—inbound or outbound.

Helps keep you in compliance with applicable regulations and facilitates management of DNC requests.

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## Feature

## Benefit to You

### Time Zone Dialing Rules

Apply time zone filters to configure your outbound calling.

Configure your outbound calling to comply with regulations on appropriate timeframes for campaign calling.

### Answering Machine Detection

The Five9 platform has the capability to precisely detect answering machines.

Keeps productivity optimized for outbound call processing, while delivering a more effective, complete message to the contact.

### Automatic Voicemail Laydown

Enables B2B sales reps to select a voicemail message to leave to an answering machine, and the Five9 platform ensures the message is recorded.

Increases the productivity of your B2B sales team by allowing reps to quickly move on to the next call while the Five9 platform ensures the message is recorded.

### Data Import

Easily import outbound calling lists and associate them to campaigns. Lists are dialed according to the sort order that was imported, or they can be shuffled to randomly dial the records.

Upload lists of target prospects on the fly and accelerate your momentum in filling the sales pipeline with potential leads.

### Data Import Via FTP

Automate the list import process by using a FTP server to store the lists, and schedule routine updates on a daily, semi-weekly, or weekly basis. Use templates for mapping of list fields to contact fields.

Improve outbound campaign results by ensuring timely updates to dialing lists.

### Disposition Timers and Redials

Configure each disposition with its own parameters for redial timing.

Increase agent productivity by optimizing dialing list penetration and ensuring that more live calls are handled.

## Inbound Voice Features

With Five9 Inbound VCC, you get all the functionality and benefits of premise-based call center infrastructure without the costs, deployment delays, or integration headaches. Five9 advanced cloud contact center software provides important advantages to your customer support operations:

- Greater business flexibility
- Increased operational control
- Enhanced customer satisfaction

### Five9 Automatic Call Distribution (ACD)

Eliminate the capital expenditure, IT and maintenance costs of your premise-based ACD solution. With the Five9 ACD in the cloud, you have robust call distribution capabilities—call processing, queuing, and routing—to deliver your customers to the next available agent who is most capable of handling the call. Plus you get all the system capabilities for automatically tracking and reporting incoming call activity and other call statistics.

Feature	Benefit to You
<p><b>Skills-Based Routing</b></p> <p>Your customers' phone calls are directed to the right queue, prioritized based on your business requirements, and delivered to the resource with the requisite expertise for first call resolution.</p>	<p>Improve the customer experience with your brand when customer calls are completed successfully the first time, without transfers between agents or groups.</p>
<p><b>Priority Routing</b></p> <p>Prioritize calls based on criteria such as customer data, IVR outcomes, time in queue, and more.</p>	<p>Align your cloud ACD functionality to your business objectives and success metrics.</p>
<p><b>Time-Of-Day Routing</b></p> <p>The Five9 ACD provides scheduling features based on the business rules you determine.</p>	<p>Your contact center operations are aligned to your hours of operation, holidays and other events.</p>
<p><b>Queue Callbacks</b></p> <p>Gives your customers an option to hang up and automatically receive a callback when their position arrives in queue.</p>	<p>Eliminate long queue wait times and improve the customer experience during peak call volume periods, while managing the productivity of your agents.</p>
<p><b>Voicemail Routing</b></p> <p>Since phone calls have greater priority, route voicemails to a group of appropriately skilled agents during quiet periods for inbound and outbound calls.</p>	<p>Accelerates voicemail processing and return calls by routing customers' specific messages to specific queues.</p>
<p><b>Incoming Call Whisper</b></p> <p>A custom prompt that gives notice about the context for the incoming call with the specific name of the program or campaign.</p>	<p>Improves campaign and customer management, particularly when agents work from multiple queues.</p>
<p><b>Distribution Algorithms</b></p> <p>The Five9 ACD allows you to define how the system selects the next agent to whom a call will be delivered—from longest wait/ queue time or round robin to minimum calls handled, in which the ACD prioritizes agents who have received fewer calls.</p>	<p>Your administrator has the flexibility and control of how the ACD selects the next agent for call delivery based on what meets your business rules.</p>
<p><b>Toll-Free Numbers</b></p> <p>Five9 can provide toll free and local numbers so you can launch one or multiple inbound programs. Or, if you own existing toll free or local numbers, you can optionally ask your carrier to make Five9 the responsible organization for those numbers. Alternatively, you can arrange with your carrier to forward calls to a DID number provided by Five9, allowing calls to that toll free number to be answered by the Five9 platform.</p>	<p>You have multiple telephony options for provisioning your inbound programs, and all of the numbers provisioned in the Five9 platform can be easily associated to your inbound programs by your administrator.</p>

## Five9 Interactive Voice Response (IVR)

Whether it's enabling self-service or live agent support, the Five9 IVR can deliver a better customer experience by efficiently determining the specific nature of the call for actionable routing. Since the IVR capabilities are all accessible via an easy-to-use graphical designer, you can quickly create advanced voice applications that improve customer satisfaction.

Feature	Benefit to You
<b>IVR Script Designer</b> An intuitive drag-and-drop interface along with more advanced features, such as linking scripts together and using a single script for multiple inbound programs, allow you to easily build IVR functionality.	Rapidly create and easily maintain a comprehensive IVR solution that delivers a convenient and efficient customer experience.
<b>Prompts</b> Five9 provides a default library of professionally recorded prompts, and you can also add your own audio files that represent the voice of your brand.	Easily configured in your Five9 IVR, these audio files give callers instructions or information, and can add efficiencies to IVR call processing.
<b>Text-To-Speech</b> Five9's text-to-speech builder gives you access to a variety of male and female voice characters.	Allows you to provide customers with dynamic information in IVR scripts, such as an account balance or shipment status.
<b>Speech Recognition</b> For advanced self-service voice applications, enables callers to navigate menus and provide input using their speech.	By replacing phone key interaction with voice input, companies create a more natural and improved customer experience.
<b>Call Variables</b> Administrators can create custom fields that store data associated to calls, which in turn can be used in IVR scripts and text-to-speech during a customer call.	Inbound contact centers can create more robust IVR scripts that improve self-service functionality and increase the number of calls completed in the IVR to lower costs.
<b>CRM Lookup</b> Customer contact records can be retrieved by the IVR based on the combination of any CRM fields.	Improve customer service and agent productivity by identifying more callers in the IVR.
<b>IVR Script Linking</b> Link multiple IVR scripts together as sub-routines without having to create a single complex script for each campaign.	Improve productivity with flexible and consistent IVR scripts that are used as "building blocks" for customer service functionality.
<b>IVR Script Scheduling</b> Select and schedule IVR scripts for inbound programs.	Tailor your inbound contact center services to your hours of operation or change the routing for holidays.



Feature	Benefit to You
<p><b>In-Queue Announcements</b></p> <p>Plays audio files in IVR scripts for callers in queue.</p>	<p>Improve customer service with audio announcements as callers wait in queue.</p>
<p><b>Estimated Wait Time Announcements</b></p> <p>Pre-built, in-queue announcements that are used to give callers an estimated wait time when it exceeds 2, 3, 5, or 10 minutes.</p>	<p>Reach out to callers when queue times are longer than usual and improve customer service.</p>

## Additional Voice Features and Benefits

The features described in this section provide a common foundation the Five9 Virtual Contact Center and are available for inbound, outbound or blended operations.

### Customer Management Tools

Feature	Benefit to You
<p><b>Contact Database</b></p> <p>Five9 offers multiple options to capture and manage your customers' data:</p> <ul style="list-style-type: none"> <li>• <b>Standard and Customized Contact Database:</b> Ten standard customer contact data fields and the ability to add up to 45 custom fields.</li> <li>• <b>Cloud APIs and Web Connectors:</b> Integration capability for third-party or customers' proprietary contact databases.</li> <li>• <b>CRM Integrations:</b> CTI adapters for integration with market-leading CRM applications including Salesforce, Oracle/RightNow, Zendesk, Netsuite, and Velocify.</li> </ul>	<p>You can choose the one that's right for your business with the visibility you need to manage sales and provide top-notch customer service.</p>
<p><b>CTI</b></p> <p>As a voice and data-management application, Computer Telephony Integration (CTI) orchestrates the voice call with the caller's data to automatically transmit relevant, precise customer information to the agent's screen ("screen pop") as the call session begins.</p>	<p>Enhances agent call handling and productivity, while delivering a valued, personalized experience to your customers.</p>
<p><b>Screen Pop</b></p> <p>With initiation of the call session, agents receive a customer-specific screen automatically displaying the customer contact record to the agent with key documentation about the specific customer's interactions and history.</p>	<p>Delivers personalized engagement with customers and improves agent productivity by guiding inbound customer service inter- actions and outbound sales-related calls with customer contact history.</p>

Feature

Benefit to You

**Remote Agents**

Agents can log in from any Internet connection, providing you with the option to implement a distributed workforce operations model using virtual, or at-home agents.

Lowers your operational costs, provides flexible resource allocation, and increases your pool of talent by eliminating the constraints of premise-bound environments.

**Agent Scripting**

Provides automated scripts for both inbound and outbound calls, along with branching logic and forms to manage complex interactions and save important information about the call or caller.

Ensures relevant conversations with your customers, consistent messaging for each campaign, and enhances agent productivity.

**Dispositions**

Tracks the result of each call, utilizing pre-defined system dispositions and custom results. To highlight, track or escalate specific call dispositions and ensure optimal customer experiences, Five9 provides the ability to designate any disposition or call outcome for internal email or instant messaging notification.

Allows you to assess how well your operations are handling customer needs and achieving business goals.

**Post-Call Surveys**

Offers the ability to configure inbound programs and outbound campaigns for post-call surveys, with automatic routing to the survey.

An important feedback tool for researching and gaining insight into the customers' experiences and the efficacy of your campaigns.

**Callbacks**

Offers agents the ability to schedule a customer callback during or after a call and provides automated screen reminders to ensure callback completion.

Provides customers with an opportunity for a more personalized experience with specific agents.

**Voicemail**

Five9 enables you to route customer voicemails to specific agents or queues, where they can be processed along with calls. When voicemails are urgent, email notifications can be set to optionally attach the voicemail.

Gives your customers more customer service options and allows you to manage the routing of customer voicemail messages.

## Operations Management

Feature	Benefit to You
<b>User Profiles</b> Facilitates the assignment of roles—administrator, supervisor, agent, and reporting access, as well as user permissions to multiple users at once.	Accelerates deployment of your Five9 Virtual Contact Center by assigning or changing user roles and permissions in one place.
<b>Skill Groups</b> Organize agents and supervisors into skill groups and assign them to outbound campaigns and inbound call queues.	Ensures that callers efficiently reach appropriately skilled agents to increase inbound first call resolution rates and outbound sales revenues.
<b>Agent Groups</b> Provides the ability to configure organizational groupings for your agents, such as sales, service, marketing, retention and support.	You have built-in flexibility to manage your contact center operations and align operations with your business.
<b>Workflow Rules</b> Defines conditional rules that execute inbound and outbound actions when events are triggered, such as stopping or starting a campaign on a specific date.	Automates operations and provides the flexibility to efficiently make changes to conform to changing business needs.
<b>Internal Messaging</b> Internal communication tools for your operations, including chat and internal calls among users as well as broadcast messaging to agents or groups.	The Five9 Blended Contact Center provides essential communication tools to keep your users up-to-date with timely information and to improve agent effectiveness when they quickly need to discuss customer service and sales topics with other agents.
<b>Call Priority</b> Provides the ability to assign a profile to inbound programs and outbound campaigns to designate call priority.	Aligns your contact center operations to your strategic business objectives and target marketing initiatives to capture higher priority calls associated with specific campaigns regardless of when they enter a queue.
<b>Role Based Interfaces</b> <b>Agent:</b> Agents can view their daily statistics and session history, manage live calls, communicate with other users, process voice-mails, and manage the contact database. <b>Supervisor:</b> Supervisors can monitor and control agent activities, view real-time statistics, monitor calls, and communicate with other users. <b>Administrator:</b> Administrators can use a familiar and efficient interface to configure and maintain your Five9 Virtual Contact Center.	Five9 provides role-based applications that maximize user productivity.

Feature

Benefit to You

**Call Monitoring**

Multiple modes for monitoring the agent workforce—from **silent monitoring** and **whisper coaching**, to **barge-in** and **random monitoring**.

Silent monitoring and whisper coaching give supervisors visibility and flexibility to coach agents as needed to improve their skill set. Barge-in mode provides ultimate control over the customer call; and random monitoring offers the ability to sample agent performance throughout your operations

**Supervisor iPad App**

The app gives the contact center supervisor the freedom to chat with agents, monitor agents and queues and listen, whisper or barge-in to calls.

The app provides a contact center supervisor with the information they need without being tied to a desk.

**Quality Monitoring**

Feature

Benefit to You

**Call Recording**

Configure call recordings of inbound programs or outbound campaigns to capture agents' conversations during call sessions, including 3rd party call segments, or capture caller's IVR speech input. Recordings are transferred daily as .wav audio files to a FTP server via Secure FTP transmission.

Manage the quality of your contact center operations, ensure a positive customer experience, verify sales transactions, reduce liability, resolve customer issues, and comply with regulatory and legal requirements.

**Reason Codes**

Enable default or custom reason codes to track agent work states.

Provides ability to effectively manage your agents' time.

**Security**

Feature

Benefit to You

**Password Policies**

User authentication that allows you to specify password policies, expiration periods, password history, lockout attempts, and more.

You have full control over user authentication for your Five9 Virtual Contact Center.

**Trusted IP Ranges**

For secure access to the Five9 software, you can configure IP ranges to allow specific IP addresses or addresses within a range to access the system.

Through IP address identification, you have additional controls for user access to the Five9 Virtual Contact Center.

Feature	Benefit to You
<p><b>Secure FTP</b></p> <p>Five9 provides an option to secure FTP for any file transfer operation to or from the Five9 system.</p>	Safeguards the transfer of customer and calling list files.
<p><b>Secure RTP</b></p> <p>Secure real-time transport protocol provides strong encryption for your agents' VoIP communications.</p>	Minimizes the risk of malicious deciphering of your phone conversations.
<p><b>Certificates for IVR Query Data Dips</b></p> <p>Support for Secure Socket Layer (SSL) connections is provided by allowing Administrators to upload Trusted Certificates (.crt files) for use by IVR Web Service Query Data Dips, when accessing external data sources.</p>	Improve security by utilizing a SSL connection to provide an encrypted link between the Five9 IVR and external data sources, such as the user's web server.

### Telephony and Call Control

Your Five9 Virtual Contact Center transmits communications between your agents and customers over the Internet using state-of-the-art, cost-effective Voice over IP (VoIP) technology. Five9 offers multiple carrier and telecom network connectivity options so you have the best fit for your business requirements —whether it's over the public Internet, SIP Trunking or MPLS connectivity.

Feature	Benefit to You
<p><b>Agent Connectivity Options</b></p> <p><b>Softphone:</b> Using Voice over Internet Protocol (VoIP) to transmit calls over the Internet, delivers the call directly to a built-in softphone running on the agent's workstation.</p> <p><b>Media Gateway:</b> A network device that enables an inexpensive VoIP connection to your agents' desk phones and provides a higher level of security because it can be located outside of the firewall.</p> <p><b>PSTN:</b> Uses any direct dial number and phone to establish a connection and deliver Five9 calls to your agents.</p>	The Five9 Virtual Contact Center offers flexibility in how calls are delivered to your agents.
<p><b>VoIP QoS Support</b></p> <p>VoIP Quality of Service (QoS) support is used within a converged voice and data network.</p>	Provides the option to prioritize voice traffic within a converged network.
<p><b>Agent Call Control</b></p> <p>Via a familiar and user-friendly softphone toolbar, agents can answer, speed dial, record/pause, hold/retrieve, park/retrieve, forward or warm transfer, conference and disconnect calls.</p>	Five9 provides your agents complete control over each call they handle.

Feature	Benefit to You
<p><b>Call Forwarding</b></p> <p>With permission, agents may configure an alternate phone number for call forwarding when they do not answer their Five9 phone.</p>	<p>Improves customer service by providing greater access to agents, such as when the agents are brokers within a financial institution.</p>
<p><b>Agent Presence</b></p> <p>Provides agents with real-time information to determine the availability of other agents for call transfer.</p>	<p>Facilitates one-call resolution and customer satisfaction when an agent needs to escalate to a different skill set or subject matter expert to resolve a customer's need.</p>

## Features Available to Social, Email, and Chat Applications

### Five9 Connect

#### Natural Language Processing

Feature	Benefit to You
<p><b>Spam Filtering</b></p> <p>The Natural Language Processing (NLP) engine tags and categorizes posts before they enter an agent's queue. Posts are automatically filtered based on relevance and tagged accordingly.</p>	<p>The NLP engine improves agent efficiency by tagging posts as actionable or non-actionable, enabling agents to concisely focus on actionable posts.</p>
<p><b>Sentiment Analysis</b></p> <p>The NLP engine automatically scans content and determines whether the author is happy, neutral, or unhappy.</p>	<p>Improves customer service by enabling the agent to prioritize and respond to posts based on customer sentiment.</p>
<p><b>Persistent Business Issue Clustering</b></p> <p>This is the first tier of clustering where the NLP engine identifies the core business issue being mentioned in a social post. For example, "billing," "customer support," and "sales" are all persistent business issues. A list of relevant persistent business issues is created during system training of the NLP engine.</p>	<p>The automatic tagging of posts with a persistent business issue category enables Five9 to route the request to the right agent with the right skills leading to better "First Contact Resolution" rates.</p>
<p><b>Trending Topics</b></p> <p>This is the second tier of clustering where the NLP engine identifies mentions of similar topics over a short period of time. This is used to catch topics that are trending during the last 24 hours.</p>	<p>Supervisors can scan for new issues and quickly decide if agents should respond to it.</p>

## Rules Engine

### Feature

### Benefit to You

#### Rules-Based Prioritization

Automatically tags social posts based on a scale of priority one, priority two, and priority three. These priorities are defined by the enterprise based on their particular needs. For example, an enterprise may want to tag any author with an influence score over 50 to be a priority one.

Improves customer service and satisfaction by enabling agents to respond first to customers with posts that are of the highest priority.

#### Rules-Based Routing

Allows you to send items to a group or individual agents based on attributes that you define. For example, a skill like language proficiency or technical ability could be attributes.

Improves customer service and satisfaction by routing to the most skilled agent.

#### Rules-Based Automatic Dispositioning

There are three fundamental disposition types—open (being worked), transferred (to someone else), and closed. Rules can be used to automatically assign a workflow milestone in one of these three categories. For example, “researching item,” “transferring to support,” or “closed no action required” are all dispositions.

By automatically dispositioning posts, agents only see those items that really matter to their productivity.

#### Rules-Based Attribute Tagging

In addition to workflow milestones, agents may manually tag posts with custom attributes such as location, type of query, and campaign. These manual attributes can also be triggered automatically based on existence of certain words. For example, a specific location can be automatically tagged for a city.

You can automatically characterize posts in order to glean customer insights into the transactions for a particular campaign. This saves a lot of time because manual tagging gets in the way of agent productivity.

## Advanced Agent Assistance Tools

### Feature

### Benefit to You

#### Media Stream Queue

A queue of items from text-based channels is provided to the agent from within the multichannel agent desktop. The stream can include social posts, emails, and chat requests.

Agents can easily view, search, select, and respond to inquiries from multiple text-based channels.

#### Sorting and Custom Views

Agents can sort the media stream based on a variety of filters. For example—LIFO/FIFO, Time Frame, Sentiment, Relevance, Cluster, Profile, and Priority. This gives a constrained view of work items. The supervisor can also lock these settings.

Agents or supervisors can easily customize the types of items that fill agents' media streams. Supervisors can also more easily onboard new agents by constraining views.

Feature

Benefit to You

**Author Search and Conversational Threading**

Agents can type in a person's name and search for posts from that individual. Conversational threading allows agent to establish a custom (sortable) thread for one customer.

Improves agent productivity when interacting with prolific authors. Threading makes it easier for an agent to focus on a specific conversation.

**Author Influence Score**

The author's influence score is displayed on the author profile panel. Spam, public influence, and corporate influence as measured by percentages of total interactions are graphically displayed.

Makes it easier for the agent to understand the person with whom they are interacting.

**Author Editing or Merging**

Agents can curate an author's CRM record by editing profile information or by merging more than one profile together.

Gives agents a more robust view of author information and eliminates duplicates.

**Next Best Actions**

Specific enterprise "policies" can be shown to the agent when particular conditions exist through an agent script. For example, a new customer who has an out-of-box product failure may get a brand new product—with no questions asked—in the first 30 days. Or an agent can be instructed to transfer to the retention desk if a customer asks to cancel service.

Ensures that agents follow corporate policies and guidelines. Provides a mechanism to establish a process for escalations.

**Predefined Agent Responses**

Agent can select from a list of predefined responses to commonly asked questions like "How do I reset my password?"

Helps agents to quickly and accurately respond to customer issues.

**Advanced Search**

Uses the NLP engine to determine the meaning of a social post, email, or chat request. It then automatically searches an associated knowledgebase for helpful articles. Agent can use a shortened URL to push the articles to a customer through social, chat, or email.

Reduces problem resolution time and improves CSAT by improving the accuracy of responses.

**Panoramic Timeline**

Displays a history of all interactions with a customer, across social, email, and chat channels.

Agents can easily view past responses helping them to provide a consistent stream of answers.



Feature

Benefit to You

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**View History Based on Topic**

Agents can bind a topic thread to a single interaction or bind multiple interactions to a topic to create a common thread.

Enables agents to view robust information about an interaction.

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**Agent Notes**

Allows the agent to create a custom note associated with the author and interaction.

Ability to maintain context and history of interactions with a customer.

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**Transfer to Agent or Group**

Agents can transfer an interaction to another agent, to a group queue, or back to the main Media Stream for all groups.

Enables an agent to quickly and easily transfer to the most skilled agent.

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**Dispositions**

A drop-down menu enables the agent to disposition interactions and moves them into the next stage of a workflow. Dispositions are tallied for KPI and SLA reports.

Ability to move items to the next stage of a workflow. Allows contact center managers to track performance.

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**Readerboard**

Continuously scrolling display at the bottom of the agent desktop, with productivity statistics, associated profiles, and groups in which the agent is a member.

Helps agents to stay on top of current activities.

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**Agent Directory**

Agent can search for other agents and view their readiness state. Agents can chat with other agents, send messages, or find all agents in a specific group.

Enables agents to collaborate with team members.

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**Agent Profiles Metrics**

Provides the agent a summary of his/her own performance against the top performer in the group and against the group average. Displays the percentage of outreach, assignment and average handle time.

Helps to promote friendly competition between agents to increase performance.

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**Agent Totals Report**

Provides the agent a horizontal bar chart displaying performance across all profiles for which they are authorized.

Helps to promote friendly competition between agents to increase performance.

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**Multichannel Administration**

Administrators can specify the types of channels and how many simultaneous interactions an agent is allowed to handle. They can also specify whether the agent can select (cherry pick) items or if items are automatically assigned based on ACD routing rules.

Ability to easily set up and manage multichannel agents.

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## Five9 Social Features

Feature	Benefit to You
<b>Social Networks</b> Ability to listen to public posts made on popular social networks including Twitter and Facebook.	Ability to respond to posts made on popular networks. High volume of data enables NLP engine to learn what is spam, what the prevailing clusters are, and determine trends for sentiment.
<b>Private Messages</b> Private messaging allows you to send and receive discrete messages that are not visible on the activity feed.	Improves the agent's ability to communicate privately with customers.
<b>Fan Pages</b> A fan page is like a miniature website that is hosted on a particular social network site. These are typically company pages or cause pages. The ability to grab comments, replies, and conversation threads on a fan page is important because fan pages have almost 100% relevant posts.	Allows for an administrative "Proxy" so all agents can share the same account but not bump into each other. Makes agents in a group more productive and prevents agents from stepping on each other's toes.
<b>Zimbra/Telligent Peer-to-Peer Integration</b> Agents can respond to posts made on peer-to-peer community sites powered by Zimbra/Telligent.	Improves customer care and helps to build community participation. Agents can answer questions when community members don't.
<b>Blogs and Articles</b> Individual blogs and articles can be captured in order to see what top journalists and influencers are saying.	Ability to understand what the most influential people are saying.
<b>Video</b> Listens to comments made on YouTube videos. A link to the video associated with the comment is also provided to the agent.	Provides a popular source of social conversation. Also add to the list of trending topics.
<b>Create Post</b> Agents can post to Twitter or a corporate Facebook fan page.	Easily post helpful updates to customers through social networks.

## Five9 Chat Features and Benefits

Feature	Benefit to You
<b>Chat via Website or Mobile App</b> <p>Chats can be initiated through multiple touch points. These include smartphone, website, and chat links sent via email or social. Sessions can be initiated by customers or by the system based on triggers. A customizable HTML5/JavaScript widget acts as a customer entry point for chats. The widget is auto-sizing to optimize the user experience across both mobile and desktop devices.</p>	Ability for agents to engage in live sessions with customers on multiple devices.
<b>Multiple Chat Sessions</b> <p>Agents are able to engage in multiple, simultaneous chat sessions.</p>	Maximizes agent productivity.
<b>Transfer or Conference Chats</b> <p>Ability for an agent to conference in other members of their team including supervisors. Agents can also transfer chats sessions to other agents or groups.</p>	Helps the agent to quickly and effectively assist customers.
<b>Visitor Information</b> <p>All of the data that a customer fills out on the web or mobile chat widget is captured and transmitted to the agent's screen. Identifying information such as full name and email address is used to automatically "pop" the customer record.</p>	Provides a "heads-up" display for the agent to understand the context of the chat request.
<b>Auto-Greeting</b> <p>Two types of greetings are available. One is a configurable global greeting that is used as a default if there is no customized agent greeting. The other is an agent-customizable greeting.</p>	Helps to improve the customer experience.
<b>Web Form with Drop-Down Lists for Topic Selection</b> <p>The Five9 Chat widget for web and mobile use is customizable so that additional fields and parameters can be processed by the system. For example, some enterprises may want to include a customer account number or order number.</p>	Enables the organization to easily capture information that is tailored to the organization.

Feature	Benefit to You
<p><b>Automatic Reconnect</b></p> <p>If an agent is disconnected for any reason (for example, loses their Internet connection), the chat dialog with customer(s) does not shut down. Instead, the chat interaction persists in the system so if the agent is able to log back in before the customer disconnects, the agent and customer are automatically reconnected. All the context of each interaction persists, so the agent can pick up where he left of.</p>	<p>Reliable and mission-critical chat infrastructure.</p>

## Five9 Email Features and Benefits

Feature	Benefit to You
<p><b>Multiple Touch Points</b></p> <p>You can capture and respond to emails from traditional email clients as well as from web and mobile webpages using the Five9 email web form. Five9 will fetch email data from your site for processing along with other customer requests.</p>	<p>Ability to respond to emails from multiple touch points.</p>
<p><b>Cross-Channel Threading</b></p> <p>Agents can see previous email, social, and chat responses.</p>	<p>Gives agents the ability to see the full context of a conversation.</p>
<p><b>Email Tagging and Routing</b></p> <p>Five9 Connect uses the NLP engine to identify spam and tag incoming emails for relevance, customer sentiment, and persistent business issues.</p>	<p>Enables organizations to filter and route emails to the most qualified agent.</p>

## Five9 Visual IVR Features and Benefits

Feature	Benefit to You
<p><b>Visual Self-Service</b></p> <p>Easily extend self-service to your customers with a responsive visual experience on a website, mobile webpage, or native smartphone app.</p>	<p>Improves customer service while reducing support costs through call deflection.</p>
<p><b>Access to Live Service via Phone, Email, or Chat</b></p> <p>Customers can opt to interact with a live agent via email, chat, or callback.</p>	<p>Enables customers to choose their preferred mode of interaction.</p>

Feature	Benefit to You
<p><b>Estimated Wait Time</b></p> <p>When a customer opts for a callback during a Five9 Visual IVR session, they can be shown an estimated wait time with the option to wait or request a callback.</p>	<p>Customers no longer need to sit on hold during periods of heavy call volume.</p>
<p><b>Reusable IVR Scripts</b></p> <p>You can create specific Visual IVR scripts and/or convert existing voice IVR scripts.</p>	<p>Reduces development and maintenance time by allowing you to build once and deploy for voice and mobile service.</p>
<p><b>Database Lookup</b></p> <p>Visual IVR leverages the power of Five9's existing IVR script building including the ability to use the query module to retrieve information from external databases.</p>	<p>Enables you to provide information to customers on a self-service basis.</p>
<p><b>Visual IVR Testing</b></p> <p>You can launch Visual IVR scripts from the campaign manager into a web browser for testing.</p>	<p>Simplifies development and testing.</p>
<p><b>Prepackaged and Customer Themes</b></p> <p>Visual IVR comes with a set of visual designs for web and mobile interaction. You can also develop your own themes using standard CSS.</p>	<p>Retain company banding and design.</p>
<p><b>Visual Customer Feedback</b></p> <p>Lets you collect customer satisfaction feedback immediately after a call, email or chat interaction using an intuitive visual feedback form.</p>	<p>Improve CSAT and NPS by monitoring and measuring customer satisfaction.</p>

## Reporting

Feature	Benefit to You
<p><b>Real-Time Reporting</b></p> <p>Supervisors can operate the contact center more effectively by monitoring contact center statistics and key performance indicators (KPIs), personalizing their views and alerts, and viewing real-time information in an Excel dashboard.</p>	<p>Improves Supervisor reaction time to call-volume statistics, and agent and queue management.</p>

Feature

Benefit to You

**Historical Reporting**

Supervisors and Administrators can view and export 100 standard reports on calls, campaigns, call dispositions/outcomes, dialing lists, and users.

Aids in forecasting and provides a repository for reports and KPIs.

**Custom Reports**

Create custom tabular, summary, or matrix reports based on a large number of criteria and time periods. Include specific columns, filter criteria, and summarization.

Offers greater contact center performance insight, and flexibility for users to tailor the reporting application to their specific needs or role.

**Scheduled Reports**

Schedule reports to automatically run daily, weekly or monthly. View scheduled reports online in the reporting application or have reports delivered to an email address. Share scheduled reports with other users.

Improves user productivity by allowing reports to be automatically processed and delivered.

**Canned Reports**

Access to a limited set of reports without the ability to create, modify, "save as" or schedule reports. You choose the report, define the time zone and interval for the report, and the system generates the report.

Provides you with access to operational insights without providing access to restricted data. Excellent for outsourcers to distribute to their clients and contact center managers to share with non-Five9 users.

**Charts for VCC Standard Reports**

Ability to add pie, line, bar, and column charts to reports.

Improves ability to monitor and analyze KPIs.

**Multichannel Reports**

Historical reports and real-time dashboards for text interactions including agent achievement, agent AHT, Agent Max Handle Time, Group Max Handle Time, Group SLA, Volume Report, Workload Summary by Campaign, and Workload Summary by Skill.

Allows you to monitor and measure performance across interaction channels.

**Five9 Dashboards**

Easily configurable, real-time dashboards for monitoring KPIs. Includes drag-and-drop widgets and charts for voice and text monitoring.

Improves supervisor efficiency and ability to adhere to SLAs.

**Visual IVR Reporting**

Additional reports are provided including a session log, module summary, and script summary.

Ability to understand session results for text, voice, and self-service.

## Application Integration

Your organization has probably made investments over the years in applications or proprietary systems. That technology has become integral to well-established processes and it's working well for your end users and contact center management. We help you take your existing applications with you to the Five9 Cloud by providing a comprehensive suite of application integrations and Cloud APIs.

Our integrations allow you to fully leverage Five9's Cloud Contact Center with your existing applications so that:

- Customer records appear in front of agents during inbound or outbound calls
- Existing lists can be used for outbound dialing
- Notes and call logs can be saved to your system of record
- High-value callers or those with open incidents can be efficiently routed to the appropriate agent

Five9 also offers the largest professional services team among cloud contact center providers with the experience to implement your integrations quickly and successfully.

Feature	Benefit to You
<p><b>CRM Integrations</b></p> <p>Through a CTI adapter, the functionality of the Five9 contact center platform is embedded within market-leading customer relationship management (CRM) applications—Salesforce, NetSuite, Velocify, and Oracle Service Cloud—to give the user access to the contact center capabilities built into the CRM user interface. While not all features of the Five9 platform are supported by all CRM integrations, Salesforce, NetSuite and Velocify integrations offer features such as:</p> <p><b>Screen Pop:</b> Allows agents to view caller information right after a call is delivered</p> <p><b>Click-To-Dial:</b> Agents can efficiently make calls by clicking a number in any CRM contact, lead or account through the softphone on their workstation</p> <p><b>Activity History:</b> All calls and associated notes are logged in each CRM contact's interaction history</p> <p><b>List Synchronization:</b> Allows users to add CRM contacts and leads to Five9 lists as well as modify or remove contacts from Five 9 dialing lists</p>	<p>Businesses powered by the Five9 CRM Integration solution have the flexibility to cost-effectively transform their static CRM applications into dynamic customer engagement tools.</p>

Feature	Benefit to You
<p data-bbox="440 256 578 285"><b>Cloud APIs</b></p> <p data-bbox="440 302 948 361">Five9 offers a comprehensive set of Cloud APIs that use web services to enable software integrations:</p> <ul data-bbox="440 373 985 772" style="list-style-type: none"><li data-bbox="440 373 985 466">• <b>Computer Telephony Integration (CTI) Web Services API</b> that connects the Five9 softphone to business applications.</li><li data-bbox="440 478 985 596">• <b>Configuration Web Services API</b> designed for the Administrator Application to retrieve data from external systems for data routing or to manage campaigns and add new leads to call lists.</li><li data-bbox="440 609 985 667">• <b>Reporting Web Services API</b> enables retrieval of call log and agent audit reporting data.</li><li data-bbox="440 680 985 772">• <b>Statistics Web Services API</b> allows you to build applications that securely access data in the Supervisor Application and serve out real-time statistics and notifications.</li></ul>	<p data-bbox="1003 302 1549 390">Five9 Cloud APIs give you the flexibility to use your internal applications and proprietary systems, such as ERP and billing systems.</p>
<p data-bbox="440 844 643 873"><b>Web Connectors</b></p> <p data-bbox="440 890 985 978">Built-in integration capability for the Agent Application that enables the execution of a dynamic HTTP Get/Post to an external web-based system.</p>	<p data-bbox="1003 890 1549 1008">Provides you with a lightweight, easy-to-implement integration option to connect to other web-based applications like an in-house CRM system. Results can be displayed directly within the Agent application.</p>

