



The New CX Starts Here

Where AI Meets Impact:

4-Steps to Customize and Deploy AI Successfully for CX

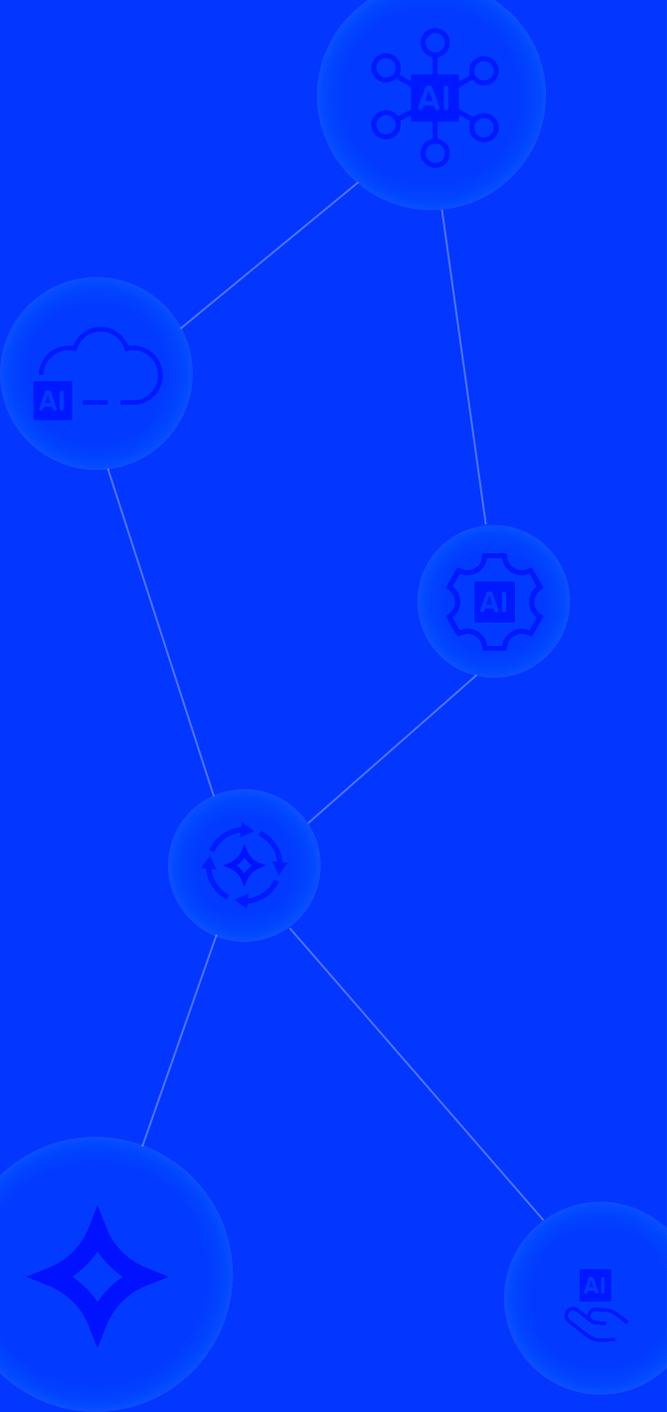


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Today, contact centers report they are turning to GenAI for the following reasons:*



25.9%

Better serve customers



22.4%

Improve customer ratings



20%

Make agents more efficient



18.3%

Generate more revenue



13.3%

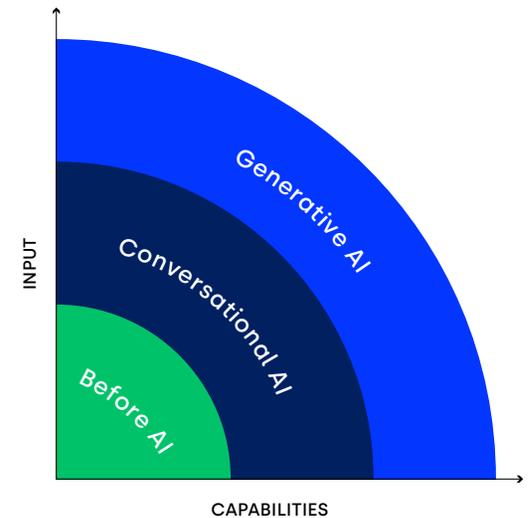
Save money

Introduction

Generative AI (GenAI) is unleashing the boundaries of customer experience (CX) — creating new possibilities to deliver the seamless CX you've long imagined. When combined with technologies such as conversational AI, it promises the process improvements and [acceleration needed for sustainable, competitive growth](#).

Generative AI Has Propelled Us into a New Era

- Creates new state-of-the-art contact centers
- More personalized and human-like self-service
- Provides agents real-time knowledge and guidance
- Uncovers CX Insights quickly and easily
- Faster time to market for AI development
- Improves business outcomes



The challenge lies in determining where, when, and how to strategically deploy AI. With a crowded marketplace and high uncertainty, navigating AI can be confusing. Achieving optimal outcomes remains difficult.

Yet, amidst the Wild West of the current AI landscape, you can deploy calm, structured, tailored, responsible AI experiences that mitigate risk and deliver practical, high-impact outcomes. Today.

* AI in the Contact Center: A Roadmap to Success and Transformation, Metrigy, 2024.



"We want to optimize what we have with Five9 now, because we're just scratching the surface of the automated AI environments. I look forward to seeing how Five9 can solve our business problems that other technology up until now hasn't been able to."

Central Bank

You can cut through the AI noise and harness generative AI for your specific use cases that are aligned with your goals. Benefit from AI models grounded in your enterprise contextual data, all while ensuring secure AI practices are in place.

When AI is successfully deployed, you can realize:



- New cost efficiencies
- Improved agent experiences & retention
- Increased revenue generation
- High ROI
- Confidence using AI to realize business goals
- Improved customer retention & CSAT
- New innovations
- CX that meets customer needs in the GenAI Era

We're going to show you how.

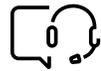
Redefining CX Strategies with Generative AI

No doubt, organizations of all kinds have struggled with persistent CX challenges for years. With recent advancements in AI, you will be able to address some of these more effectively today than ever before.



80% of contact centers will be using Generative AI by 2028 predicts Gartner.

Pain Points for CX Leaders



Customers

- Unintuitive self-service
- Long hold times & high abandonment
- Impersonal self-service
- Limited self-service options



Agents

- Long onboarding times
- High average handle times & average call wait times
- Low productivity
- High turnover



Management

- Poor visibility into CX trends
- Difficulty deploying automation
- High repeat call rates
- Need for better agent performance & coaching



Deployment

- High implementation costs
- Reliance on data scientists
- Long time to value
- Apprehension about trust & security

These are typical CX challenges, but certainly not the only ones. Solving them has traditionally involved breaking down silos, integrating data and systems, deploying automation, and improving employee performance — strategies all dependent on human time, effort, and productivity.

Generative AI Augments Human and Virtual Agent Abilities

GenAI introduces novel ways to help tackle historic CX challenges in its ability to draw upon vast amounts of data and deliver results within seconds. It can drive faster automations, more human-like self-service experiences, and support employees unlike anything we've seen so far. Because GenAI does not require the lengthy amounts of training and fine-tuning that previous AI versions did, it delivers outcomes and ROI at record speed.

It is a powerful technological enabler for optimized CX.



Use an AI Strategy to Realize Practical Impact Today

AI experiences propel your CX and contact center performance forward by *years*, not months. The question is where, when, and how do you deploy AI?

Getting started is where most people get stuck.

In our experience, to harness the potential of AI today you need to:



Identify and prioritize use cases to maximize ROI

Identifying high-impact areas for AI, like automating support and personalizing interactions, is crucial for enhancing CX. Prioritize these use cases based on potential ROI and align them with business goals to ensure efficient resource allocation and measurable outcomes.



Tailor AI models for specific business outcomes

Generic models often fail to address unique business needs, leading to suboptimal results. Customizing AI solutions to address specific business challenges and objectives is essential.



Ground AI models with contextual data and knowledge unique to your enterprise

Integrate proprietary data and industry-specific knowledge into your AI models to enhance their relevance and accuracy. This enables more personalized and contextually aware experiences, ensuring the AI meets your customers' specific needs and preferences.

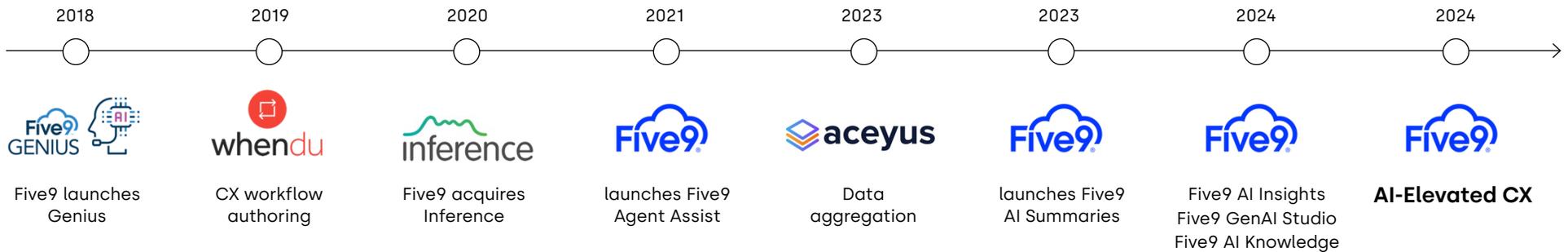


Establish trust and guardrails around AI

Establishing guardrails for using GenAI in CX is challenged by data privacy, ethical considerations, and alignment with brand values. Continuous monitoring and regulatory compliance are essential to prevent misuse and maintain customer trust.

Five9 Has Been Building and Deploying AI for Years

In addition to our own R&D, we have made several key acquisitions. The result is industry-leading AI for CX.



At Five9, our team of AI experts bring deep CX industry experience successfully deploying AI products with our customers. We've been developing our AI solutions in-house and through acquisition for more than a decade.

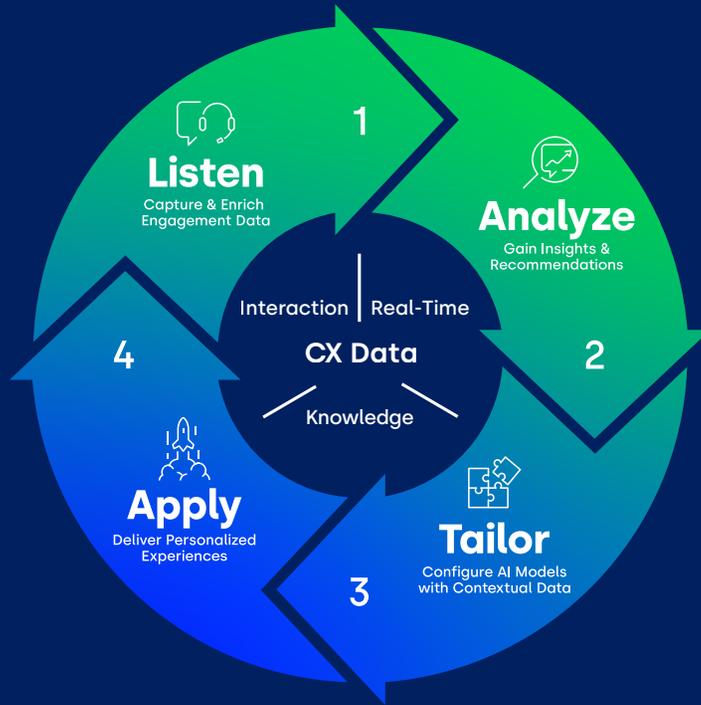
With this expertise, we guide you every step of the way to ensure successful implementation tailored to your business needs. We understand that every enterprise is at a different stage in their AI journey — so we meet you where you are with a flexible, customer-centric process.

We bring calm to the chaos and help leaders like you get started implementing AI with ease, order, and the confidence that you'll realize strong ROI and powerful outcomes.



“Five9 took an early leadership position with market-ready AI solutions and, with GenAI Studio, they provide easy-to-use tools that leverage their formidable array of resources.”

Dan Miller, Lead Analyst and Founder, Opus Research



Five9 Genius AI doesn't just improve customer interactions — it elevates them to a new level. It starts with our industry-leading approach by embedding AI across every CX application.

Meet Five9 Genius AI: Strategically Design Your AI Solution with a Genius Process

Five9 Genius AI

Five9 Genius AI is our comprehensive product suite that enables you to build AI applications tailored to your use cases. It is designed to deliver personalized self-service capabilities, automate workflows, and work alongside your employees and agents to augment their abilities.

Our AI and Automation product suite:

- Delivers personalized and engaging self-service with omnichannel IVAs
- Empowers agents with AI Agent Assist and AI Summaries
- Provides CX insights for leaders with AI Insights
- Supplies a low-code/no-code intuitive interface to build custom AI models

But we don't stop at providing comprehensive solutions. We help you implement them. Recognizing the need for structured implementation, we developed a strategic AI process to bring order to the complexity.

Five9 Genius AI Process

The Five9 Genius AI Process is a 4-step strategic process for delivering AI business value with a structured approach to deploying AI successfully in contact centers. Take a smart, data-driven approach to choosing where, when, and how to implement AI for CX.

AI is complex and can be difficult to understand. To fully untangle these intricacies, we have developed a four-step methodology designed to create a structured roadmap to AI success. This process guides you through the stages required to strategically integrate AI for your CX.

Let's look at some of the outcomes contact centers are realizing with Five9 Genius AI:



- 50% reduction in call volume to agents
- 80% success rate in matching customer intent with NLP routing
- 20% fail rate for AI self-service (among industry's lowest)

[See Case Study](#)



- 15% reduction in call volume with Five9 IVA
- Automated post-call summaries with pronoun gender-neutrality and simplified data points

[See Case Study](#)



- 50% call containment
- 23% cost savings with IVA compared to an FTE agent
- 10% increase in self-service in the first year

[See Case Study](#)



- 44% cost savings in the contact center
- 45% of calls resolved via Five9 IVA
- 2% call abandonment rate

[See Case Study](#)



Taking a structured approach ensures systematic AI deployment and a maximum return on investment. It also makes certain that you are optimizing AI for the use cases that will drive the biggest impact on your business objectives.

Step 1: Listen



Capture & Enrich Engagement Data Across All Touchpoints



Five9 Intelligent CX Platform

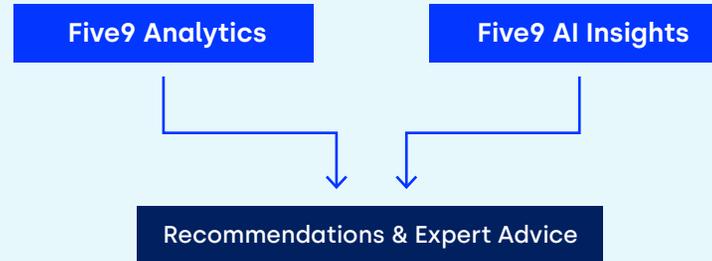
Benefit: Build a strong data foundation and enrich across all touchpoints to understand your customers better.

The first step is to capture and enrich engagement data across all touchpoints. The [Five9 Intelligent CX Platform](#) provides a strong data foundation to store every interaction and metadata, including calls, webchat, SMS, email, and social channels like WhatsApp in the Five9 Data Lake. We use Five9 VoiceStream and Five9 TranscriptStream to automatically transfer data to our partner ecosystem. Capturing all your customer engagement data is essential to nailing down the most valuable AI use cases and creating a roadmap for future deployments.

Step 2: Analyze



Gain Insights & Recommendations to Make Better Decisions



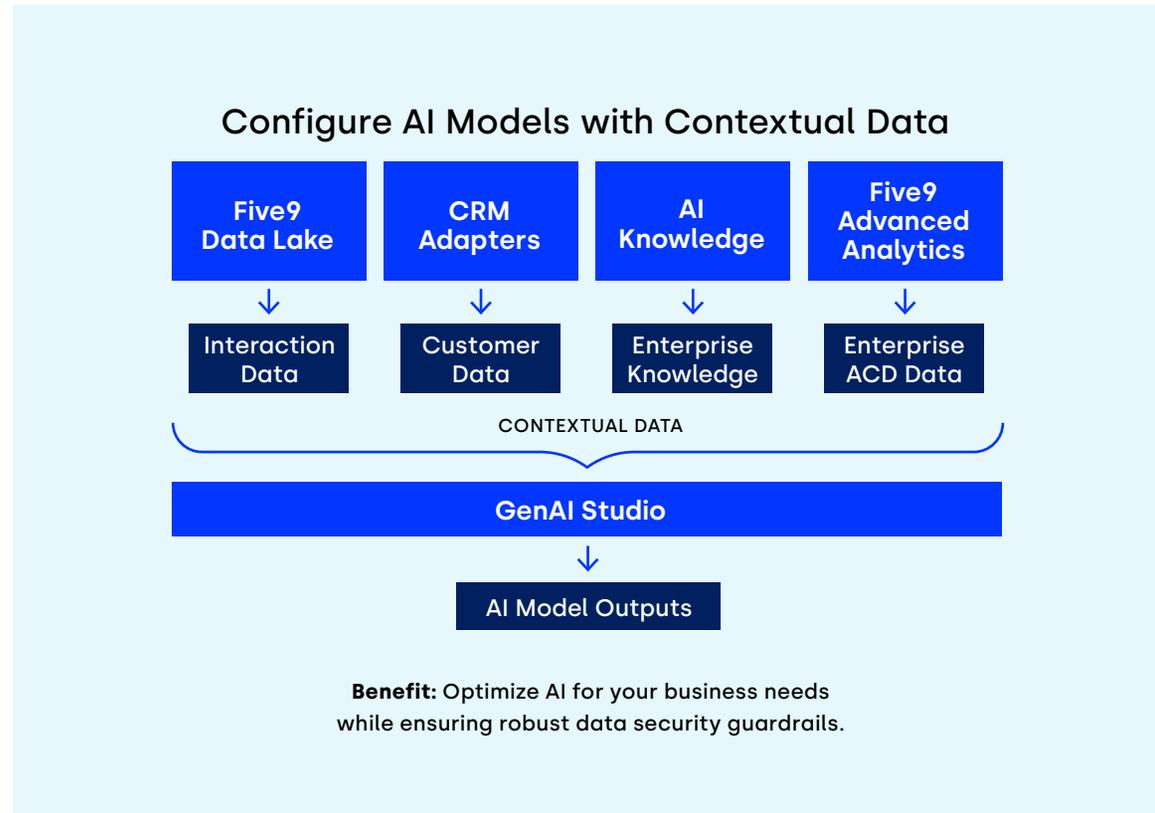
Benefit: Quickly identify opportunities to enhance self-service and streamline customer and employee experiences.

Using the latest AI-powered techniques, we then analyze your data to gain rich CX insights based on the voice of customers. You gain insights and recommendations to make better decisions on an ongoing basis.

Through Five9 AI Insights, we pinpoint patterns, trends, and areas for improvement in both contact center operations and the customer and agent experience. Our AI and contact center experts partner with you to explore the data and discuss the findings.

Equipped with this analysis, you can make data-driven decisions about your AI strategy.

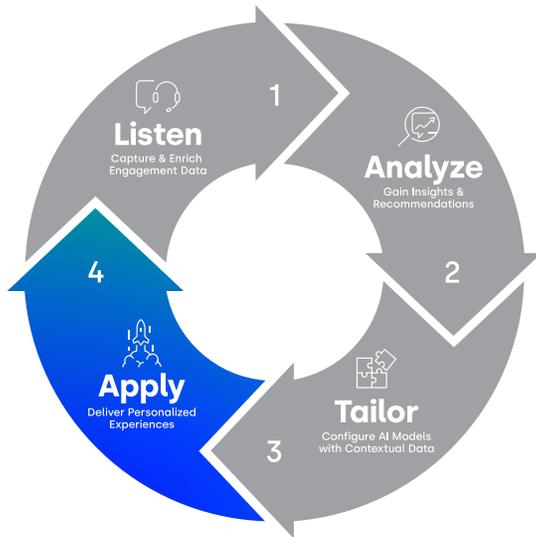
Step 3: Tailor



Once you have determined where to optimize, we combine interaction data with other data sources to provide meaningful context for your AI models. This ensures that your AI models are tailored to *your* unique business use cases.

With Five9 GenAI Studio and Five9 AI Knowledge, you can configure AI models and optimize them with contextual data and your enterprise knowledge. You customize off-the-shelf large language models with your data, creating custom outputs for your use cases. In this stage, you establish AI guardrails by anchoring AI models in your proprietary data and controlling their reliance on default outputs. Our compliance experts will work with you to help determine the guardrails most appropriate to your business, industry, and regulatory mandates.

Step 4: Apply



Design Personalized Experiences Optimizing Every Engagement



AI



Human

Full spectrum of automated to assisted experience across all channels

AI-Powered Self-Service | Agent Assistance | CX Insights

Benefit: Delight your customers with hyper-personalized experiences that quickly resolve issues and increase customer satisfaction.

Finally, you apply analysis results and identify appropriate AI models to produce tangible, measurable outcomes. Here, you select and design the optimal combination of solutions using AI design tools from the Five9 Genius AI portfolio to deliver personalized experiences, elevating your CX and agent experience to unprecedented levels.

Whether through automated, assisted, or combined experiences, you design personalized CX engagement that will help you achieve your desired business outcomes. Five9 Genius AI tools are available to support your AI strategy. Our AI expert team will work with you for successful implementation and continued AI tuning to support your AI journey.



Aeroflow Health Uses GenAI Studio to Customize Post-Call Summaries for Each Business Unit

With [GenAI Studio](#), Aeroflow Health moved from default summaries to custom AI model outputs for their post-call summaries. They created custom GenAI prompts for each business unit while adding contextual data to customize their post-call summaries. The result:

- Shorter, more accurate summaries
- Pronoun gender-neutral mention for agents
- Key data points (e.g. call motive, outcome, actions taken) at the end of summaries

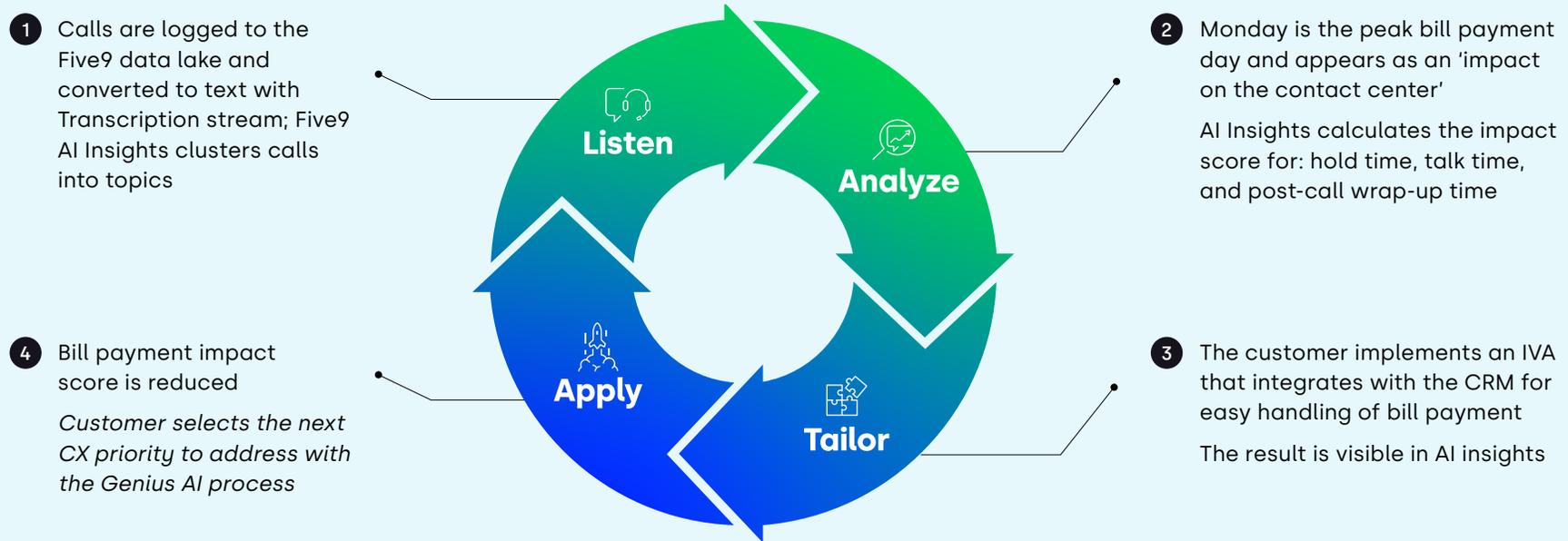
"We are excited about rolling out our custom summaries and will continue to refine them as needed. It's huge to us that we can customize and adapt to different needs, and that's something we're really grateful for with Five9."

Aeroflow Health



Customer Handles Peak Call Day

Five9 Genius AI Process Improves CX & Bill Pay Optimization



Future Proof Your AI Deployments

Using the Five9 Genius AI Process guarantees that you have a repeatable, structured method to identify use cases, tailor AI models, and select the right toolsets to achieve your outcomes. You can apply this process — every time you develop a new use case and on an ongoing basis. It simplifies AI strategy, development, and implementation, giving you a solid, defensible business use case to gain buy-in.

It also helps your organization gain trust in adopting AI and provides a methodology to anchor future AI deployments in tangible business outcomes. You can run every AI decision through the Five9 Genius AI Process.

Deploy AI for Your Use Cases with the Five9 Genius AI Product Suite

Looking to understand how you should leverage AI to optimize every touchpoint of the customer journey with the Genius AI product suite?

Here are the top use cases we see and the AI products that optimize CX. These use cases help address top pain points for CX leaders outlined on [page 5](#).

1.

Deliver Personalized Self-Service

I want to...

- Increase self-service automation rate
- Increase containment rate
- Decrease customer effort score (CES)
- Understand customer intents
- Improve call deflection
- Lower call abandonment rates



Solution:

Five9 Omnichannel IVAs

Voice and Digital Conversational and GenAI-powered voice self-service to automate routine tasks.

Use it to...

- Automate password resets and status inquiries, appointment setting, bookings, payments, order lookup, customer surveys, authentication/verification, and answering all FAQs

2.

Automate Authentication

I want to...

- Improve security
- Decrease authentication costs
- Improve CX with convenient authentication process



Solution:

Five9 AI Authentication

Voice Biometrics Solution improves security and CX with seamless and secure voice.

Use it to...

- Automate caller authentication with active or passive enrollment and verification
- Improve fraud detection

3.

Provide Agents with Assistance

I want to...

- Improve CSAT
- Lower costs with reduced after call work and AHT
- Support agent performance with real-time assistance
- Improve agent productivity
- Reduce manual note taking and automate call transcriptions



Solution:

Five9 Agent Assist

Empower your agents with real-time guidance and automation.

Use it to...

- Increase upselling and cross-selling
- Handle objections
- Accelerate new agent onboarding
- Improve CSAT scores
- Improve regulatory compliance
- Provide real-time reminders and guidance
- Identify coaching opportunities
- Automate transcriptions

4.

Automate After Call Work

I want to...

- Increase accuracy of call summaries
- Improve quality monitoring and training
- Improve compliance and customer satisfaction



Solution:

Five9 AI Summaries

Use GenAI to generate custom summaries with customer call transcripts in seconds.

Use it to...

- Reduce after-call work
- Improve call summary consistency
- Improve agent experience

5.

Understand CX Insights

I want to...

- Improve automation rates
- Identify trends, patterns, and themes among customer interactions
- Proactively address customer needs
- Improve service quality
- Improve CX agility



Solution:

Five9 AI Insights

Learn key contact center insights to enable leaders to make data-driven decisions to optimize and enhance customer experience with real-time intelligence to improve business outcomes.

Use it to...

- Uncover Voice of the Customer trends
- Enhance real-time and post-contact analytics
- Analyze transcripts at scale
- View data in a single comprehensive dashboard

6.

Automate Workflows & Processes

I want to...

- Drive business agility
- Increase productivity and performance
- Alleviate rote, manual work
- Automate workflows among systems



Solution:

Five9 Workflow Automation (WFA)

Real-time process automation across disparate systems and data sources.

Use it to...

- Automatically reskill agents
- Provide proactive notifications
- Automate mass emails and texts
- Prioritize leads
- ANI Rotator

7.

Deploy AI Applications Effectively

I want to...

- Speed up time to value for AI deployments
- Simplify agent configuration and updates
- Ground AI models in data and knowledge
- Ensure responsible AI
- Customize agent experiences
- Define how customers get answers to questions
- Automate processes and workflows with ease



Solution:

Five9 IVA Studio

Cloud-based, no-code platform to easily build, manage, and deploy Five9 IVAs across channels.



Solution:

GenAI Studio

Customize your AI models to personalize CX for higher satisfaction with a centralized hub to create, test, and monitor GenAI prompts for all Five9 AI applications.



Solution:

Knowledge Studio

Turn your unique company knowledge into instant answers for customers, agents, and employees with contextual, knowledge-based answers for faster resolution.



Solution:

Workflow Studio

Connect and act on customer data in real time and trigger cross-platform workflows.

These products deliver AI-optimized experiences for your customers and agents.

Why Choose AI with Five9

The AI marketplace is burgeoning with immature startups and established vendors that have bolted GenAI into their existing platforms. We are neither. **Here's what makes us different:**

AI is in our DNA.

Five9 has embedded AI into our core platform for more than a decade. We foresaw the potential advantages that AI would offer contact centers and began using it early. The advent of GenAI has only led us to enhance products that were already using AI to deliver exceptional results.

We maintain full control over the quality, performance, and evolution of our AI offerings. And, we make it easy to use and deploy with a low-code/no-code approach.

We invest in AI innovation that moves CX forward.

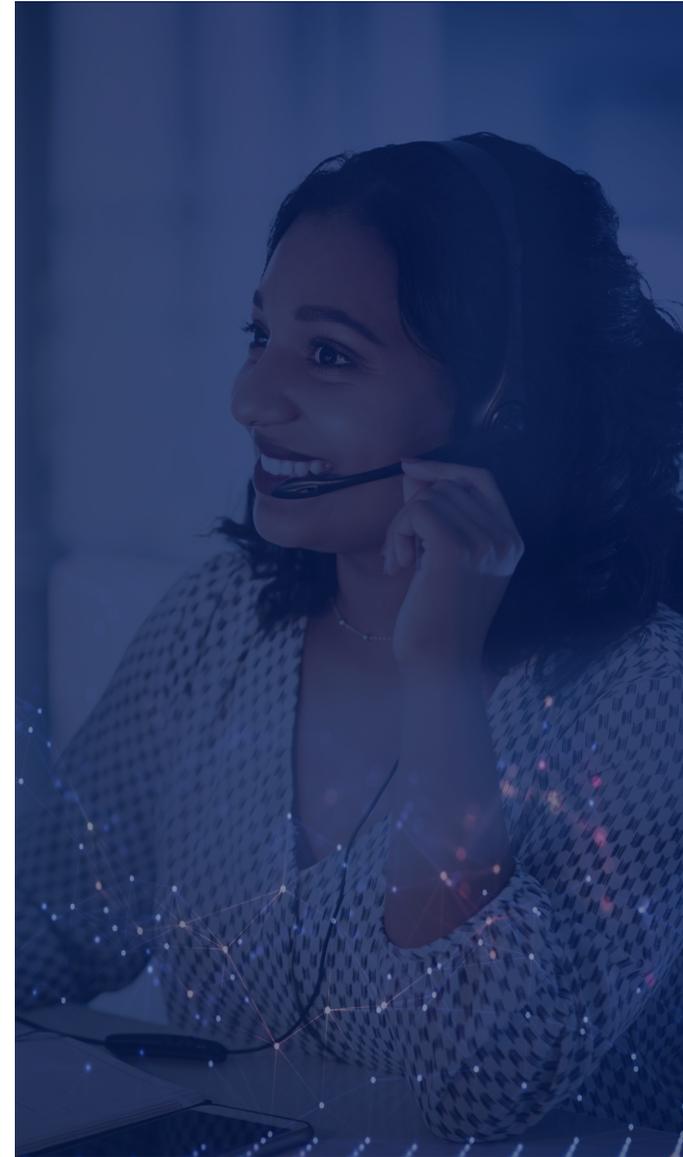
As a significant AI investor, we bring cutting-edge innovation to market. Our specific focus on GenAI enables us to advance natural language understanding and conversational capabilities, resulting in more human-like and engaging interactions with customers.

Proven ROI from deployments for every size.

We lead in contact center deployments and conversational AI, serving as a single vendor for contact center AI needs. Our platform uses unified infrastructure and data across all AI components for a cohesive and consistent approach, ensuring seamless integration of AI-powered tools to enhance CX.

Experienced people that partner with you.

Our people care about your success and are in it with you for the long haul. With deep industry expertise and extensive contact center experience, we become part of your team and value the relationships we build with you. Our success depends on yours.



Five9 AI Strategy Tenets

Our commitment to future-proofing your contact center is reflected in four core strategy tenets that steer the development of our AI platform.



EMBEDDED AI

AI across every contact center application



ENGINE-AGNOSTIC AI

Rapidly adapt to the latest innovations



PRACTICAL AI

Make accessible, useful, and easy to manage



RESPONSIBLE AI

Focus on the proper and ethical use of data





Ready to Get Started with AI? Choose Five9 Genius AI

We're here to answer your questions, show you a demo, and discuss how you can tailor AI to your business use cases for the best CX outcomes.

The New CX Starts Here. Make cutting-edge AI your competitive edge with Five9 Genius.

To learn more, visit [Five9 Genius AI](#).



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About Five9

The Five9 Intelligent CX Platform provides a comprehensive suite of solutions to engage with customers across their channel of choice, empower managers with insights and intelligence into contact center performance, and elevate your business to deliver better business outcomes and Bring Joy to CX™. Our cloud-native, scalable, and secure platform includes contact center; omnichannel engagement; Workforce Engagement Management; extensibility through more than 1,400 partners; and innovative, practical AI, automation, and journey analytics that are embedded as part of the platform. Five9 brings the power of people, technology, and partners to more than 2,500 organizations worldwide.

For more information, visit www.five9.com.

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