Buyer's Guide

# The Guide to Selecting a CCaaS and CX Provider

Five9
The Intelligent CX Platform

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Foreword: Why a Buyer's Guide?

This comprehensive guide is designed to equip you with essential considerations for selecting a CX and/or CCaaS partner. From evaluating key features to mastering SLA negotiations, this is the guide for your CX journey.

Contact centers have always been complex entities responsible for managing customer interactions across multiple channels while leveraging numerous tools and technologies. They play a critical role in the customer's overall experience with a business, yet they often sit in a silo apart from the rest of the company.

Streamlining contact center operations and integrating the contact center into the broader customer engagement and CX landscape is essential. Meeting both business and customer needs requires advanced technologies that can adapt and evolve to provide efficient and effective services. Though numerous options are available on the market, choosing the right technology is overwhelming, as countless players vie for attention.

Adding to the challenges is the deluge of niche players touting their services and using industry jargon that confuses potential customers. Contact Center leaders, CIOs and other decision-makers need help sorting through the quagmire to decipher precisely what a company offers and whether it actually meets their contact center and CX needs. Unfortunately, real and sufficient help is often scarce.

If this scenario sounds all too familiar to you, we empathize. We understand your frustrations, which is why we decided to create a resource that systematizes your next-step options. Our goal is to provide clarity so that you have the right information to choose the cloud contact center and customer experience technology that meets your needs.

Introduction: Understanding Your Technology Needs

Are you greenlighting an upgrade to your current contact center technology and looking for a solution that offers an amazing customer experience to improve satisfaction, drive sales, and boost loyalty? Are you looking to engage, motivate and empower your agents? Are you looking to infuse AI and automation and push your operations forward?

Finding the right solution can help you transform your customer experience (CX) and employee experience (EX) without sacrificing operational efficiency.

Providing a high-quality product or service is necessary for business growth, but it is no longer enough. CX and EX are critical factors for your company's success.

> **"Customers are becoming a little bit more finicky. So, when [they] have a bad experience, they tend to want to walk away from your company a lot quicker."**
>
> — Nick Delis, Senior Vice President of International and Strategic Sales, Five9

Introduction: Understanding Your Technology Needs

The Relationship Between CX and Technology

You're probably well aware of the elusive nature of customer loyalty. A positive customer experience (CX) can keep your customers coming back while drawing new customers from your competitors. Consider the following research findings from Shep Hyken, Customer Service and Experience expert:

- **86% of customers would bail on a company that doesn't provide superior customer service in favor of a competitor that does.**

- **76% of consumers prioritize CX and make it a point to patronize businesses that provide it, even going out of their way to do so.**

- **82% of customers say a positive CX increases their trust in a brand.**

Customer experience is often the single most significant differentiator between companies offering similar products and services as the market for most industries becomes increasingly crowded.

If your business is experiencing high call volumes, long wait times, dissatisfied customers, a clumsy self service experience, low first-contact resolution rates, inefficient use of employee time, agent burnout, ineffective and unaligned technology, or any combination of these, you need the technology and best practices that can address them all, and this buyer's guide has you covered.

A McKinsey & Company survey found that the number of companies prioritizing CX improvements has increased by 19%.

Priorities for customer care leaders, 2022, percentage point increase vs 2019

Category	Value
Customer experience improvement	19%
Contact volume reduction	8%
AI assistance deployment	5%
Service call revenue generation increase	5%

Source: https://www.mckinsey.com/capabilities/operations/our-insights/the-state-of-customer-care-in-2022
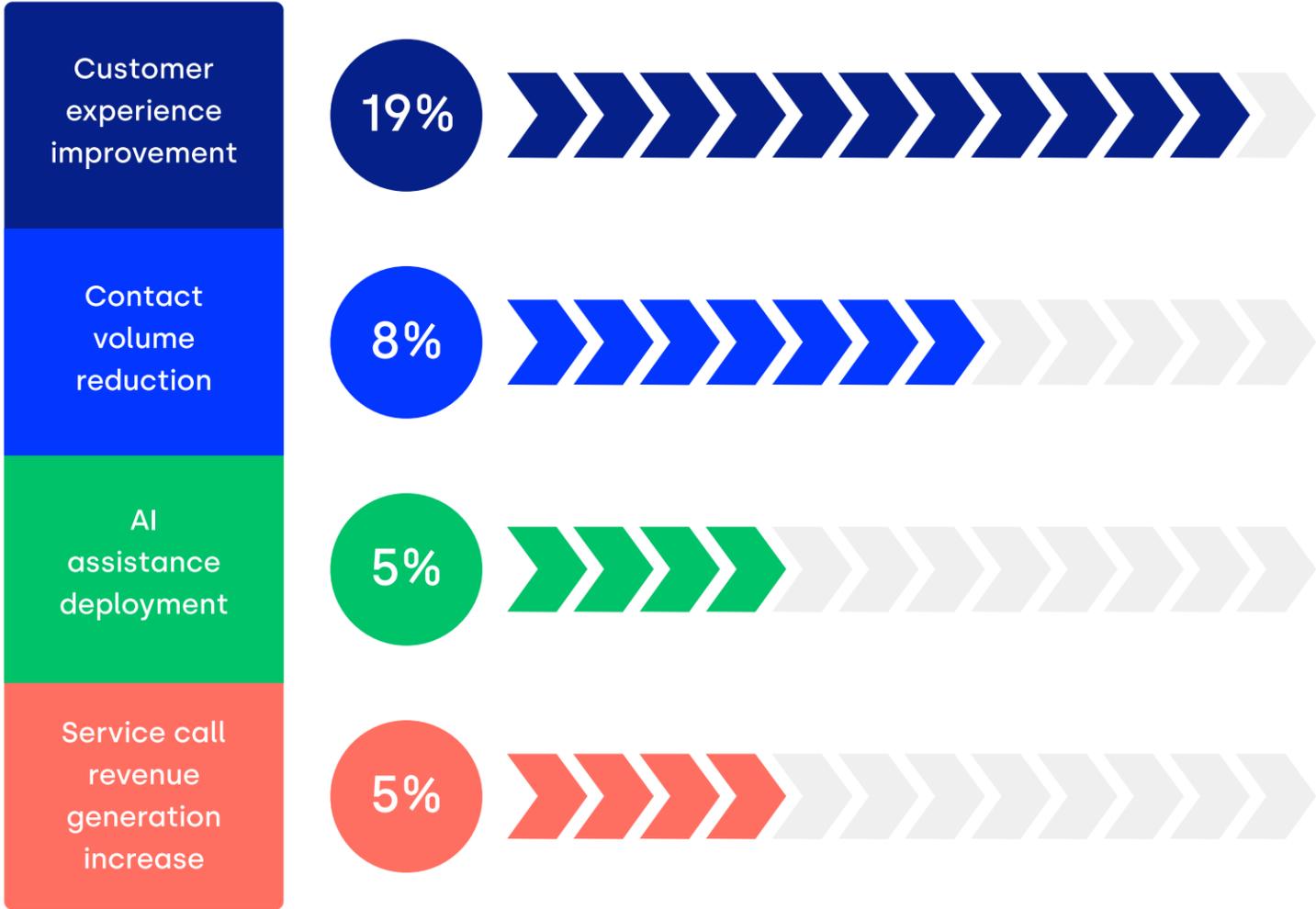
Introduction: Understanding Your Technology Needs

"THE ENDGAME HERE IS TO HAVE A REALLY POWERFUL CONTACT CENTER WITHOUT STRESSING OUT ALL THE TIME."

JASON OWEN,
CEO, Blackchair

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What Is the Best CX Solution for You?

An intelligent cloud-based CX platform may be the answer you seek, providing a centralized location for critical contact center functions and features to improve agent performance and efficiency.

Contact Center as a Service (CCaaS) providers can improve customer and agent experiences with native digital tools that boost engagement on both sides of the equation. They often include automation and artificial intelligence capabilities to increase efficiency and offer integrations that further streamline operations and help connect the contact center to the broad business and vice versa.

Whether you're moving from on-premises technology to cloud services and this is your first dive into CCaaS, or you've been here before and need to switch platforms, getting a handle on what you hope to achieve with your CX and EX technology can simplify your search. This guide walks you through a few considerations to help you focus your search and determine which product is right for your contact center.

"[If] you're moving from on-prem to cloud…I think you want to take a little bit of a step back and think, 'What are all the new opportunities that technology is giving me as I move to the cloud?' And I don't just want to replicate what I did on-prem in my new cloud environment with a platform provider like Five9."

— Gregg Johnson, CEO, Invoca

Crafting a More Fluid Experience for Your Customers
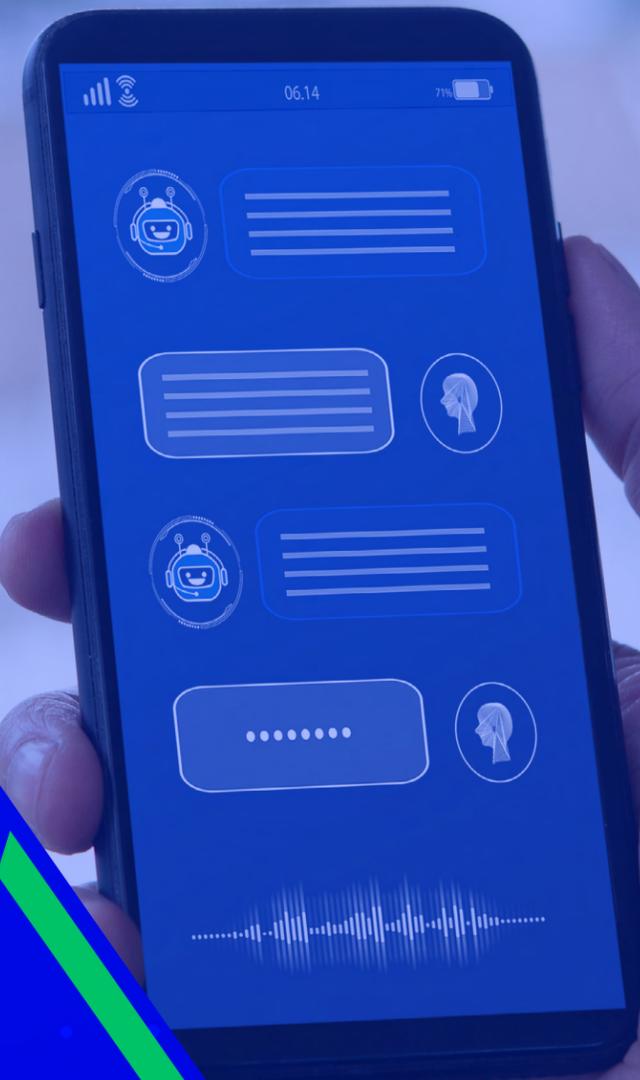
Section 1: Crafting a More Fluid Experience for Your Customers

A 2023 Metrigy survey found that voice calls still dominate the customer engagement landscape, with more than 73% of all interactions originating in a voice call or escalating to voice after a digital exchange.

However, 58.4% of all interactions originate in digital channels, with 64.2% starting as an inbound or outbound voice call. It is also worth noting that 34% of those surveyed whose companies don't offer voice support indicated that the absence of the services was due to a lack of customer demand.

Changes in voice and digital customer support interactions from 2021 to 2022 varied across industries.

Overall, how did the number of VOICE customer support interactions change in 2022 vs 2021			
Industry	**Increased**	**Decreased**	**Stayed the same**
Financial Services	45.3%	11.3%	32.1%
Manufacturing	34.8%	6.5%	47.8%
Professional Services	32.8%	15.6%	45.3%
Healthcare	44.3%	8.2%	29.5%
Education	31.8%	9.1%	43.2%
Energy & Utilities	72.7%	9.1%	18.2%
Retail	28.3%	11.3%	47.2%
Logistics	25.7%	34.3%	37.1%
Government	34.8%	8.7%	39.1%
Travel, Hospitality	45.5%	13.6%	31.8%
High-Tech, Telecom	36.9%	23.8%	32.1%
Entertainment	62.5%	16.7%	16.7%
Construction, Real Estate	35.3%	14.7%	35.3%
All	38.4%	14.4%	36.6%

Overall, how did the number of non-voice/ DIGITAL customer support interactions change in 2022 vs 2021			
Industry	**Increased**	**Decreased**	**Stayed the same**
Financial Services	43.4%	7.5%	37.7%
Manufacturing	39.1%	6.5%	45.7%
Professional Services	37.5%	12.5%	40.6%
Healthcare	31.1%	11.5%	42.6%
Education	22.7%	15.9%	45.5%
Energy & Utilities	63.6%	0.0%	36.4%
Retail	39.6%	15.1%	30.2%
Logistics	45.7%	17.1%	31.4%
Government	8.7%	13.0%	60.9%
Travel, Hospitality	54.5%	4.5%	31.8%
High-Tech, Telecom	46.4%	13.1%	36.9%
Entertainment	50.0%	8.3%	37.5%
Construction, Real Estate	32.4%	5.9%	44.1%
All	38.9%	10.9%	39.4%

Source: Metrigy Customer Insights and Analytics 2023-2024.

Section 1: Crafting a More Fluid Experience for Your Customers

Despite the prevalence of voice interactions, it's clear that more and more customers expect businesses to offer a self-service option for support (some research suggests this is the case for nearly 80% of consumers), and 84% indicate they try to resolve issues themselves before even attempting to contact customer support.

Digital self-service channels offer expedient resolutions to problems, potentially improving the customer experience for those who prefer to go the digital route first. A CCaaS platform should offer multiple digital channel options, including:

Email — **Chat/virtual assistant** — **SMS/MMS messaging** — **Social messaging**
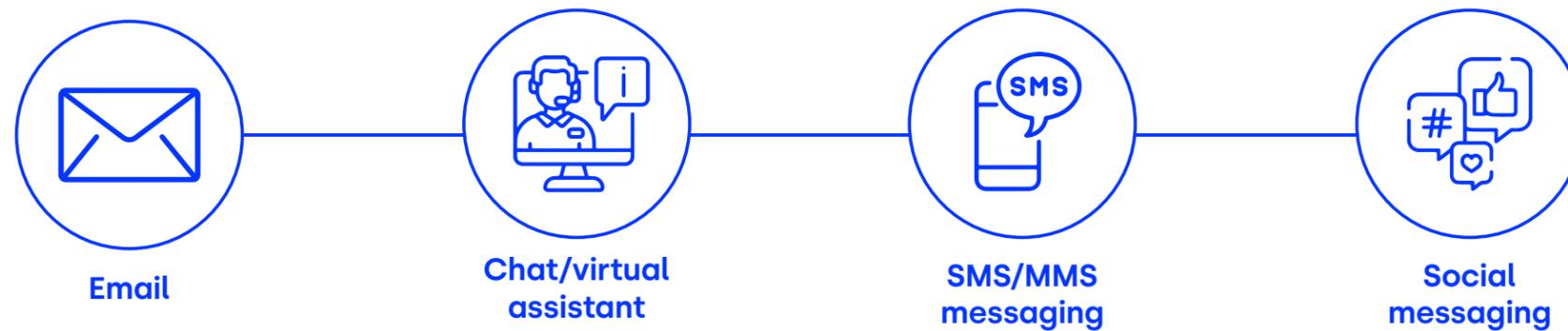
Providing these options allows customers a choice and frees your agents to handle more complex issues.

It's important to note that though offering self-service and digital options is critical, you need to make it easy for your customers to reach a live agent when desired. The most frustrating aspect of customer service for 34% of consumers is the inability to contact a live agent when a business uses an intelligent voice response system. This is why you need to develop fluid experiences.

Fluid experiences that cross self-service and digital channels empower your customers, offer convenient options, and increase contact center efficiency. Providing multiple digital support choices allows customers to find solutions through multiple avenues, selecting the one that best fits their needs.

"THERE IS TREMENDOUS VALUE IN THE DATA THAT WILL HELP WITH THE STRATEGY, USING THE DATA TO HELP OPTIMIZE AND IMPROVE THAT CUSTOMER EXPERIENCE AND TAKING THAT STRATEGIC VIEW."

MANOJ BHARDWAJ,
Senior Director of Product Management, Data and Analytics, Five9

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Section 1: Crafting a More Fluid Experience for Your Customers

What Is a Fluid Experience?

When you need help, you want it instantly. When you want an answer on a purchase you want to make, response time is never more important. This often means that prospective buyers or customers trying to connect with you to get assistance will leverage all channels, use multiple devices and create numerous touch points as they start and end their engagement with you.

If the customer's data exists in silos and you haven't built a cross-channel fluid CX, the various systems can't talk to one another. Customers seeking assistance with an issue may begin the process on one channel and move to another, for example jump from phone to computer. When communication between systems is lacking, customers must repeat themselves each time they switch devices or channels.

Nearly [90% of contact center users](#) indicate that they don't appreciate having to repeat themselves when their contact escalates to a new agent or channel, and 84% experience aggravation when the new agent doesn't have information about their issue or previous interactions.

A disjointed experience creates frustration and often causes customers to abandon their efforts and search for a better experience elsewhere, or they abandon self-service and end up "calling in." On the other hand, an integrated system that shares data between channels and preserves context so customers can pick up where they left off, creates a fluid experience.

Establishing a fluid customer experience across channels is critical to improving customer satisfaction, increasing conversion success, and generating loyalty. Today's customers are digitally savvy and may hop from one channel to the next to get answers to questions or find solutions to their problems.

Your job is to be there when they do and treat each interaction as part of a coordinated and integrated journey.

The importance of easy transitions

Enterprise businesses with high-value products tend to have more complex customer engagement journeys as customers dig deeper into product information and seek guidance from multiple venues. They may experience high anxiety levels during decision-making or when experiencing issues with the product. Understanding your customers' potential challenges is necessary to determine your technology needs.

If customers seeking assistance must start from scratch each time they transition to a different channel, it can lead to a discouraging experience and further heighten stressful emotions. Whether your business is large or small, your CCaaS should allow you to meet your customers on preferred channels and allow for a seamless transition between them.

"They may come in via the intelligent virtual agent and some AI technology that Five9 offers and have that transitioned (if necessary) to an agent [in a] seamless path so that the customer feels taken care of the entire way. And that could not just include voice channels but could include digital channels as well... Being able to understand that journey and support the customer in that journey effectively is really going to be important."

— Dave King, VP of Sales, Aceyus

Section 1: Crafting a More Fluid Experience for Your Customers

"THINGS ARE GOING TO BE ALWAYS CHANGING. WE DON'T WANT TO BE LOCKED INTO A CERTAIN SOLUTION THAT CAN BE REALLY RIGID AND CAN NEVER CHANGE. FLEXIBILITY IS THE KEY TO EVERYTHING THAT HAPPENS IN FIVE9."

RAY SOTO,
VP Engineering and Chief Architect, Five9

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Using technology to improve CX

The right technology should support your customers and aid you in delivering a fluid CX. Cross-channel knowledge management is critical for maintaining consistency throughout information and interaction channels. An advanced CCaaS platform can share information across self-service and agent channels. It can also communicate with your CRM, providing customer contact data for broader applications, such as evaluating your customers' journeys and adapting contact center operations to meet customer needs better.

Cloud storage offers a single location for maintaining customer interaction data, making it readily accessible – no matter how many contact centers you operate or how dispersed your workforce may be. Five9 combines cloud and automation capabilities to ensure real-time information updates occur as customers switch channels or agents.

For example, imagine a scenario where a customer visits your website seeking a resolution to an issue.

Not finding what they need, the customer takes advantage of the online web chat feature. However, should the virtual assistant not be able to resolve the issue, the customer may need to speak to a human agent. Rather than forcing the customer to make a phone call, it's advisable to have live agents available via chat. Therefore, the move from AI-driven assistance to human intervention becomes a smooth transition – and the system seamlessly transfers all data.

With Five9 solutions, you have the benefit of a fluid transition from self-service channels to live agent assistance. When a customer escalates from self-service to a live agent, the agent receives information about the customer's experience up to that point, allowing the agent to quickly ascertain how to proceed e.g., which web pages they visited, the status of their account (if an existing customer), or if they've previously called in.

"Having a customer experience allows the customer to choose the channel of their choice, to escalate across channels, and to not have to start over again if they change channels or they reach an agent. That same information…about the customer, the choice of channel, and moving between channels, can be provided to the customer through the Five9 suite of products and services to allow this fluid experience for the customer."

— Tony Bourdeaux, Senior Solutions Architect, Five9 Professional Services

Section 1: Crafting a More Fluid Experience for Your Customers

Though voice still reigns, new channels are increasing in adoption and preference.

Share of respondents

- ● Email
- ● Live chat
- ● Online self-service
- ● Social Media
- ● Phone/ other voice
- ● SMS/ text message
- ● Undecided

Source: https://www.statista.com/statistics/809772/customer-service-communication-channel-used-by-country/
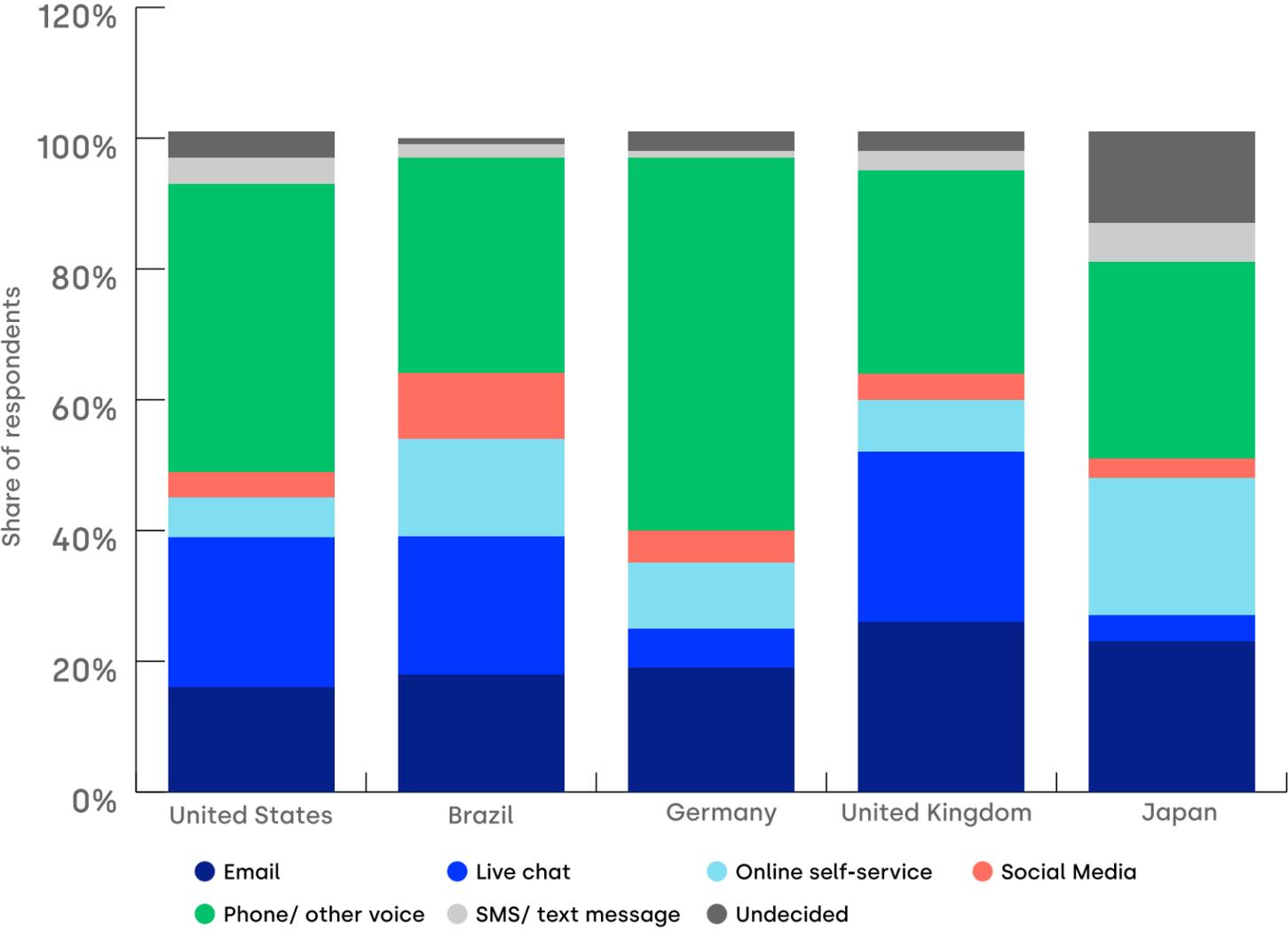
What Interaction Channels Are Right for Your Organization?

Customers expect to have a choice of communication channels, allowing them to pick the option they prefer for the goal they have with each interaction. Giving your customers and prospects a choice for communicating with your contact center is almost always a desirable option. An "optichannel" approach (allowing customers to pick the channel which is optimal for them) offers the greatest flexibility for your customers, letting them select a channel based on their goals and preferences.

Customer service channel preferences vary across countries, industries, and even generations. There may be variances from market to market as well. The ideal combination for your business depends on the range of preferences your customers have.

Make sure you understand which channels are important to your customers before choosing CX technology. Also, consider the role AI plays in providing services within each channel. A good CCaaS provider offers the full array of channels but allows you to include only the ones you need.

Section 1: Crafting a More Fluid Experience for Your Customers

How Do You Manage All the Interactions? Get Routing Right!

Figuring out which interaction to serve up when and how to pair customer demand with contact center capacity can be a daunting task. Routing needs vary between inbound, outbound, and blended services. Regardless of service type, you should look for routing options with personalized customer assistance.

Technology that integrates with a CRM provides agents with a customer's contact, purchase, and support history. Intelligent omnichannel routing ensures seamless customer engagement, no matter the chosen channel.

> "Data flow is in two directions. It's bi-directional. So, for a contact center to make intelligent routing decisions, we need to connect to other systems that might potentially create information about the customer…We also need to be able to share that data from our system with those external systems. We need to integrate better with those data warehouses. So essentially, it's about providing that 360-degree view of the customers across the channels and across all the interactions that you might have had with this customer."
>
> — Manoj Bhardwaj, Senior Director of Product Management, Data and Analytics, Five9

Section 1: Crafting a More Fluid Experience for Your Customers

> "FIVE9 IS THE FUTURE OF CONTACT CENTERS. LOOKING AT HOW WE'RE NOT JUST TALKING ABOUT AI, BUT WE'RE TALKING ABOUT CREATING WORKFLOWS AND EXPERIENCES, THAT ARE GOING TO MATTER FOR YOUR AGENT POPULACE."
>
> **MARIBEL LOPEZ,**
> Principal Analyst, Lopez Research

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Assessing available routing options

Too many contact center managers spend valuable time determining how best to meet routing needs, from scheduling agents efficiently to looking for ways to reduce wait times. The next-available-agent approach is all too common and contributes to both agent and customer frustrations. When evaluating contact center and CX technology, assess the available routing options:

- **Inbound routing:** Consider intelligent omnichannel routing that directs customers to the best-suited agent. Desirable technologies include an intelligent virtual agent (IVA), intelligent visual interactive voice response (IVR), intelligent speech-enabled IVR, predictive routing, skills-based routing, priority routing, voicemail routing, web callback, incoming Call Whisper, intelligent scripting, and agent screen pop.

- **Outbound routing:** CCaaS should provide automated dialing technologies such as the predictive dialer, real-time do-not-call list management, automatic voicemail, vertical dialing mode, and agent screen pop.

- **Blended routing:** If you operate a blended contact center, you need technology that meets your routing needs for inbound and outbound contacts and can seamlessly transition between technologies.

The technology has come far, and the menu of routing options is substantial, so you shouldn't need to handle your company's routing needs manually or compromise on efficient and effective routing technology.

Section 1: Crafting a More Fluid Experience for Your Customers

Look for a vendor that offers an array of intelligent and automated routing technologies. Consider your current needs in terms of contact center capacity, agent experience, customer demand, and channel preferences. Choose a provider that offers routing technology that meets your current needs but can scale with your company.

Intelligent routing will detect a customer's digital footprint or contact history to assess engagement and needs.

When the customer chooses a contact channel, the information about what the customer might need transfers to the channel. If the customer requires a live agent, the system can route the call or chat to an agent who can provide the right support.

However, getting the customer to the right agent isn't enough. The agent also needs access to the customer's engagement history to have enough context to readily assist, providing the quick guidance and support that leads to resolution and customer satisfaction. When routing works well, it contributes to a fluid customer experience.

Another aspect of efficient routing is agent staffing. If your contact center experiences an uptick in demand for live agents, you need agents ready to step in so customers don't experience long wait times.

Intelligent routing automatically adjusts and balances workforce assignments based on customer traffic levels and needs. This removes a stressful element for contact center managers who often try to manually predict and sort out routing and staffing needs.

Jason Owen, the CEO of Blackchair (a global CX Assurance and DevOps company), emphasizes the importance of understanding your company's routing needs before choosing a CCaaS and ensuring you opt for a platform that allows you to automate routing based on your business's traffic requirements.

Watch Full Buyer's Guide Video

Section 2

Empowering Your Agents to Deliver a More Fluid Experience for Your Customers

Section 2: Empowering Your Agents to Deliver a More Fluid Experience for Your Customers

Employee and resource management care are central to optimizing contact center efficiency, so you want to choose contact center and CX technology that also allows you to create a compelling EX. Two standard options are workforce optimization (WFO) tools and workforce engagement management (WEM) tools.

Does Your Organization Need WFO or WEM Tools?

WFO and WEM take slightly different perspectives on contact center agents and service management. However, the differences can lead to significant performance and customer experience variations.

Workforce optimization (WFO)

Workforce optimization arose as changes in technology and the spread of the customer engagement philosophy led to adaptations in employee and resource management software. Simultaneously, smartphones and automation altered service delivery capabilities.

Omnichannel contact options decentralized customer interactions and led to increased fluctuations in agent demand, creating operational and informational inefficiency. Workforce optimization tools increase efficiency and agent performance through applications such as:

- ✔ **Voice of the customer software**
- ✔ **Speech analytics**
- ✔ **Agent coaching**
- ✔ **Quality monitoring**

WFO seeks to increase effective support delivery, focusing on labor and productivity efficiency.

Workforce engagement management (WEM)

Consumers are accustomed to instantaneous information, and the rise of social media has broadened the scope of brand-consumer relationships. Customers now seek personalized communications and a relationship with brands, driving the focus on providing a superior customer experience.

A McKinsey & Company survey found that 71% of customers desire personalization and 76% find not receiving it frustrating.

71%

of consumers expect personalization.

76%

of consumers get frustrated when they don't find it.

Source: https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/the-value-of-getting-personalization-right-or-wrong-is-multiplying

Section 2: Empowering Your Agents to Deliver a More Fluid Experience for Your Customers

"CALLS WITH AGENTS CAN USE AI TO PROVIDE REAL-TIME KNOWLEDGE INFORMATION ABOUT PRODUCTS, SERVICES AND SO ON THAT ARE RELEVANT TO THAT CALL IN REAL TIME."

TONY BOURDEAUX,
Senior Solutions Architect,
Five9 Professional Services

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However, customers are only one side of the equation in a contact center. Agents play a significant role in providing an amazing customer experience. If the agents aren't engaged, you risk losing both agents and customers. This is where WEM comes in.

You can think of WEM tools as an enhancement of the features offered in WFO tools. In addition to the features that you see in a WFO system, a WEM system may also include:

- ✔ **AI agent assist**
- ✔ **Gamification**
- ✔ **Predictive analytics**
- ✔ **IVA**
- ✔ **And more...**

A WEM approach empowers your agents, giving them the tools to handle customer interactions and reduce burnout, WEM also involves the agent in the process vs. having a process applied to them.

"Workforce engagement management...adds in this element of involving the employees in the process or providing feedback to them more directly, getting them involved in that feedback, having them participate in their schedules and adjustments to those schedules and the feedback from the customers."

— Bruce Plummer, Principal Solution Consultant, Five9

Section 2: Empowering Your Agents to Deliver a More Fluid Experience for Your Customers

The Importance of Workflow Automation (WFA)

Workflow automation is essential to operational efficiency. It should be built into the fabric of any modern contact center as it helps connect the contact center with the rest of the business and helps orchestrate complex customer journeys.

WFA and the integrations you should look for in a CCaaS

Most businesses tend to operate in silos, with each department largely unconnected to and unaware of what the rest of the organization is doing. This disconnect means that the contact center is usually isolated from every other department in the business.

If your contact center is one component of a larger CX environment within your company, you need to consider how much your new software allows the contact center to link with the rest of the organization.

Integrations are essential to connectivity. As you research and evaluate CCaaS platforms, consider the following integrations:

- ✔ **CRM integrations (commercial and homegrown)**
- ✔ **UC technologies**
- ✔ **CTI technologies**
- ✔ **Marketing integrations such as Hubspot, Adobe and more**
- ✔ **Specialized vertical integrations e.g., EPIC for healthcare, Fiserv for financials, etc.**

In addition to native integrations, the provider should offer API and SDK options that allow custom integrations.

> **"I think the challenge most marketing teams have is that the contact center is a bit of a black hole to them. Oftentimes, their joint boss is the CEO, very high up in the organization. And so, I think anything that can be done to improve the flow of data, the analytical approaches, to help each of those two teams understand how they're respectively influencing the customer experience is a huge step forward."**
>
> — Gregg Johnson, CEO, Invoca

Connecting across the organization

CX strategies and concerns usually extend beyond the contact center to include other departments, most notably sales and marketing. Product and supply vendor services may also impact the customer experience.

A streamlined data flow between departments allows you to optimize operations and improve customer experience throughout the buyer's journey. For example, utilizing a B2C use case: Before an outbound campaign happens in Five9, Five9 can query Hubspot/Pardot/Eloqua for any customers who may appear on the suppression list and should not be contacted. Those customers are then removed from the campaign.

According to Mirabel Lopez, Principal Analyst at Lopez Research, "You should also be looking for a software provider that is focused very specifically on creating CX experiences, and that has the vertical expertise that you need for your industry."
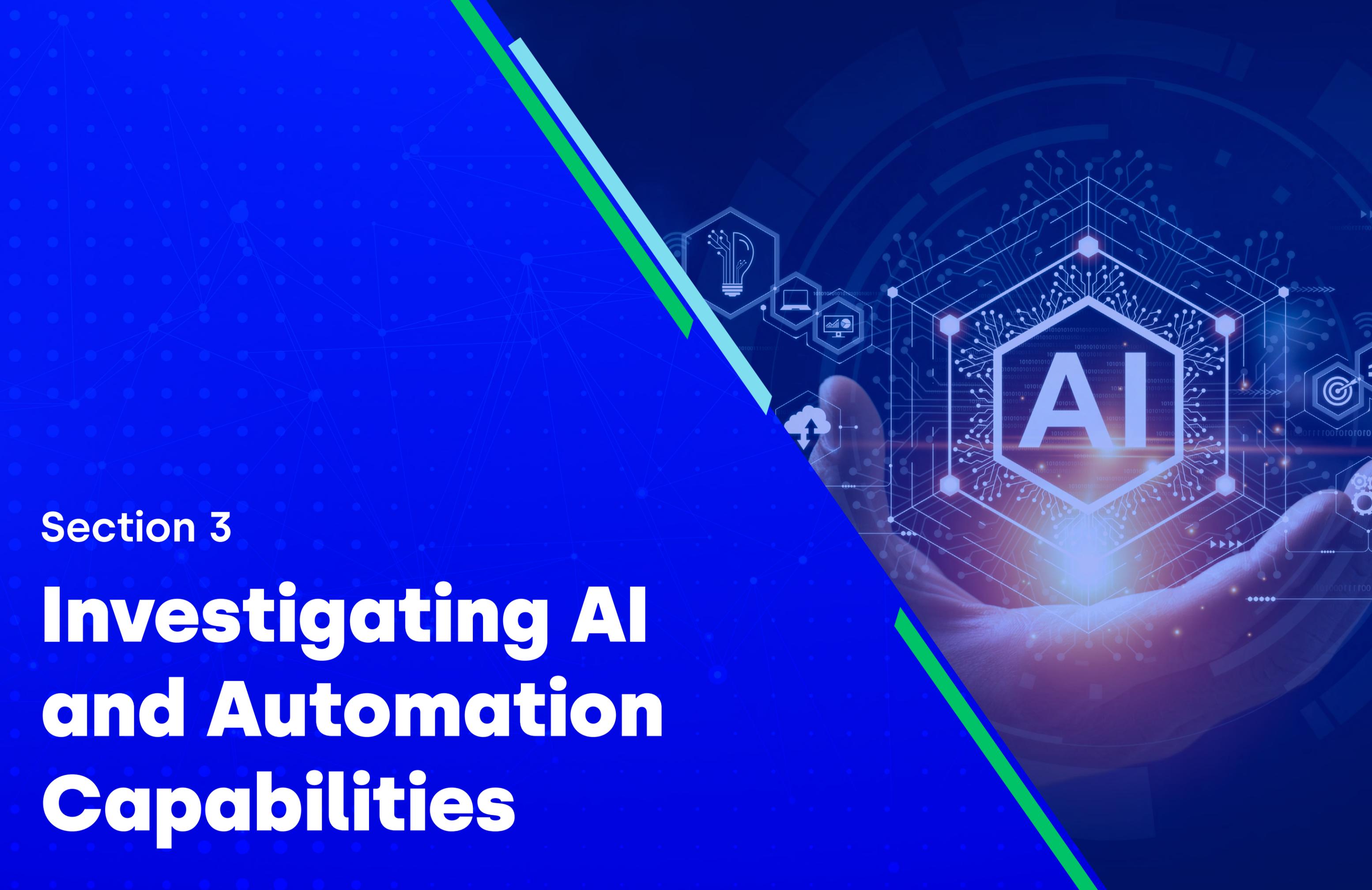
Investigating AI and Automation Capabilities

Section 3: Investigating AI and Automation Capabilities

Growth in the customer services share of the North American chatbot market between 2020 and 2023 will outpace other sectors.

Size by Application, 2020 - 2030 (USD Million)

$1.0B $1.3B

2020 2021 2022 2023 2024 2025 2026 2027 2028 2029 2030

- ● Customer Services
- ● Branding & Advertising
- ● Personal Assistance
- ● Data Privary & Compliance
- ● Payment Processing
- ● Others

Source: https://www.grandviewresearch.com/industry-analysis/chatbot-market

24.0%
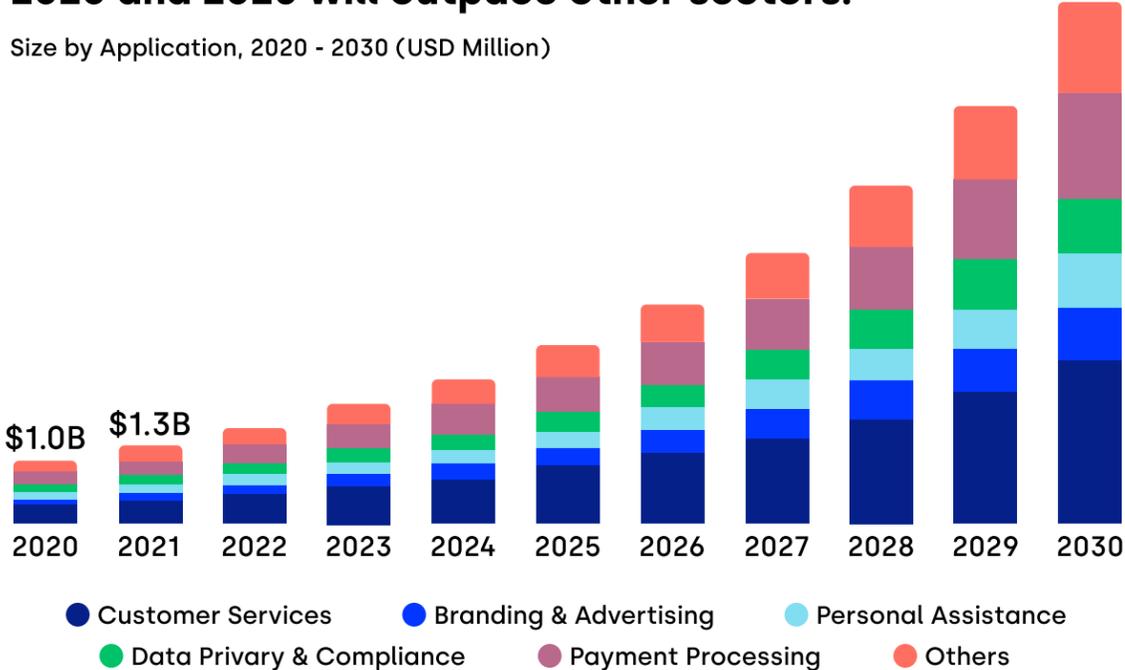
N. Ameria Market CAGR, 2023 - 2030

Source: www.grandviewresearch.com

As Gregg Johnson, Invoca CEO, notes, "We're seeing this evolution of...the role of technology and...the role of the human in the contact center." Contact centers need to embrace the digital-first approach, using technologies such as virtual assistants to expedite the process for contact center customers.

Though AI doesn't entirely replace humans, the technology can save your company in workforce hours and operating costs. For example, Juniper Research predicted that using chatbots would save 2.5 billion contact hours by 2023 within just the healthcare, finance, and retail sectors. Companies within these industries may also see up to $11 billion in annual cost savings.

Automation is another area where intelligent technology frees up resources and improves contact center efficiency. From workflow and workforce management to analytics and reporting, automation gives you the tools to optimize resources while focusing on providing a superior customer experience.

One of the benefits of working with a CCaaS provider like Five9 is that the company works closely with every customer to ensure they can incorporate AI and automation quickly and efficiently. Five9 offers guidance in setting up AI and automation functionality, suggesting use cases specific to your company.

With this kind of personalized and customized service, you reap the full benefits of AI and automation tools and maximize your ROI.

Artificial intelligence and automation are the primary prerequisites for any worthy platform. These technologies are game-changers for contact center efficiency and CX. However, if you don't know how to deploy them effectively or the programs have a steep learning curve, you won't achieve the efficiency these tools promise, negatively impacting your ROI.

Section 3: Investigating AI and Automation Capabilities

What AI and Automation Capabilities Do You Need?

Labor shortages and high turnover rates hinder achieving an efficient contact center and providing the CX that drives conversions and encourages loyalty. Though the unemployment rate seems to have normalized, economists expect it to land between 4% and 5% in 2023. However, changing workforce demographics are leading to a talent shortage that experts predict won't end anytime soon.

When investigating contact center and CX technology, consider the type of AI and automation capabilities most beneficial for your business. You can incorporate intelligent technology to assist customers, your agents, and management, which can decrease wait times, improve first-contact resolution rates, increase agent productivity, and reduce the stress of employee shortages.

AI and automation capabilities include to name a few:

- **Intelligent Virtual Assistants (IVA)**
- **Agent Assist**
- **Workflow Automation**
- **Automated Intelligent Routing**
- **Omnichannel Engagement**

The most efficient AI and automation applications are data-driven, preferably providing real-time insights to help you align processes with customer and agent needs.

"**Human agents work on the highest value work within the contact center that they can, and then use automation – and particularly artificial intelligence – for everything else.**"

— Callan Schebella, EVP of Product Management, Five9

"IF YOU HAVE SEASONALITY OR SOMETHING THAT'S REALLY IMPORTANT TO YOU WHEN IT COMES TO BEING ABLE TO FLEX UP AND DOWN, THAT'S ONE OF THE BIGGEST ADVANTAGES THAT WE PROVIDE."

NICK DELIS,
SVP of International and Strategic Sales, Five9

Section 3: Investigating AI and Automation Capabilities

> "WE'RE REALLY AT THAT TIPPING POINT WHERE LARGE LANGUAGE MODEL AND GENERATIVE AI TECHNOLOGIES ARE GOING TO COMPLETELY TRANSFORM DOING WORK IN THE CONTACT CENTER."
>
> **CALLAN SCHEBELLA,**
> EVP of Product Management, Five9

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How Large Language Models (LLM) Are Changing the Game

Large language models are among one of the greatest tech disruptions of our time but also represent a huge opportunity, especially in the contact center. Examples of LLM include OpenAI (GPT), Google (PaLM), BLOOM, and more. LLM use machine learning to generate answers and solutions to user inquiries. Their most impressive feature is their ability to respond to novel tasks and questions based on the generalized "intelligence" they gain through training on enormous datasets.

Like all technologies, LLM have their limitations (look up LLM hallucinations). However, despite these obstacles, large language models such as OpenAI's GPT-3 and GPT-4 can greatly advance efforts to improve CX. For example, Callan Schebella, EVP of Product Management at Five9, suggests incorporating these capabilities into CX and EX applications, as Five9 does with its AI Insights and Agent Assist tools.

However, it isn't enough for vendors to incorporate these technologies into their services. LLM products aren't yet inherently equipped with the level of functionality you need in a contact center. Look for CCaaS providers that leverage the strengths of LLMs, taking advantage of the "learning" component to personalize the technology and training the model on specific contact center functions, knowledge, and language. Furthermore, look for vendors who are engine agnostic. CCaaS providers offering embedded AI that leverages a variety of engines can customize their services without the need for a developer or API. They can also adapt their tools to meet specific contact center needs and deliver innovation faster.

Finally, you should also look into the vendors' data security and privacy measures that they apply to the LLM technology. This will be critical to protect you and your customers. The vendors who are truly embracing LLM won't be afraid to dive deep into data security with you.

> **"It is a pretty risky proposition to rely on essentially a single vendor engine for a solution, and it is not uncommon at all in a Five9 implementation for us to be using multiple core engine technologies within one conversation."**
>
> — Callan Schebella, EVP of Product Management, Five9

Section 4

Evaluating Whether What You Are Doing Works

Section 4: Evaluating Whether What You Are Doing Works

Optimizing operational efficiency while improving CX requires a strategic and iterative data-driven approach. Your new contact center and CX technology should include relevant and robust analytics and reporting capabilities.

Essential Key Metrics for Contact Centers

Contact center interactions are a significant determinant of customers' perceptions of their experience with your brand. Undoubtedly, your business's C-suite will want to know whether the contact center's approach to CX is working.

These are the key metrics that will provide the C-suite with the greatest insight into CX's success:

- **Revenue:** How successful are your bots and agents at closing sales or upsells? Do customers remain loyal after contact center interactions?
- **Costs:** Does your CX technology lead to lower operating costs or capital requirements?
- **Ratings:** Are customer satisfaction ratings improving?
- **Productivity:** Is agent productivity improving? Is agent attrition dropping?

Ideally, your CCaaS should improve your contact center's overall performance. Metrigy's survey revealed that the most insightful key performance indicators were:

- **76.3%** of respondents identified productivity as an important measure.
- **72.8%** of respondents identified customer issue resolution as an essential indicator.
- **56.3%** of respondents identified sales figures as an important indicator.

Other common key metrics include customer churn, CSAT / NPS, time spent on administrative tasks, deal sizes, close rates, first contact resolution, average handle time and abandonment rate. (See the Metrigy "Metrics Gap" report for more.)

76.3% of respondents identified productivity as an important measure.

72.8% of respondents identified customer issue resolution as an essential indicator.

56.3% of respondents identified sales figures as an important indicator.
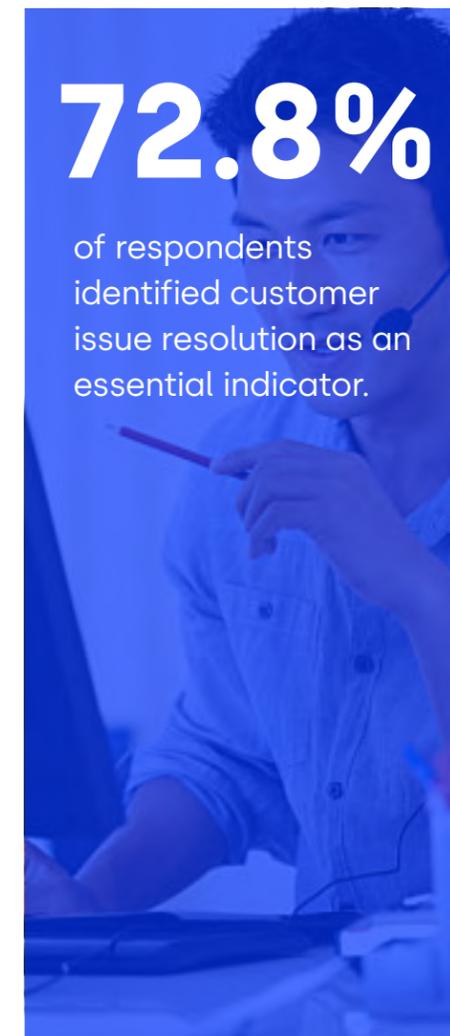
Section 4: Evaluating Whether What You Are Doing Works

What Analytics Capabilities Should You Consider?

Improving operational efficiency, omnichannel interaction effectiveness, and agent productivity rely on data-driven decision-making. As a contact center that focuses on providing an awesome customer experience, you should consider:

- **Data aggregation across channels**
- **Contact center operations reporting, including analytics that can identify customer service gaps**
- **Agent performance analytics**
- **Customer interaction analytics**
- **Out-of-the-box metrics plus customized KPI capabilities**
- **AI analytics and reporting, such as Five9's AI Agent Summary**
- **Predictive and prescriptive analytics**

You should also look at the granularity level the system is capable of. How far down can it drill, and how wide can it go to capture the data you need for actionable insights? All analysis and reporting functions should be accessible and easy to run or automate. Reports should also be shareable.

The benefit of using a CCaaS is that these systems can pull down data from every channel and across integrated systems to give you a clear understanding of your customers' experiences, your agents' performance levels, and your contact center operations. This level of insight is much more powerful than anything you could get from individual CX tools.

Section 5

Foundational Elements to Remember

Section 5: Foundational Elements to Remember

Optimizing the customer experience at every touchpoint, including during interactions with the contact center, is a critical component of a business's growth capacity.

Evaluate Your Organization's Growth Potential

Evaluating your contact center's customer experience management level before choosing new software is helpful. Gartner's CX management maturity model provides a valuable reference. The model establishes five maturity levels:

- **Ad hoc:** The business employs a piecemeal approach to CX, with various departments operating in silos and without coordinating and collaborating efforts to improve customer experience.
- **Establishing:** The company is in the exploratory stage, determining CX capability gaps, learning how CX impacts business performance, and examining ways to improve.
- **Performing:** The business has a functional system for delivering a positive customer experience across the organization.
- **Optimizing:** A CX leadership team actively seeks improvements in functionality and coordination throughout the business, regularly providing analytical insights regarding customer engagement.
- **Embedded:** The concept and process for providing a fluid and amazing customer experience are ingrained in the company culture.

If your company is within the first two levels, you aren't alone. However, with the right technology, you can move your CX closer to level five, giving you the edge over your competitors.

Scalability is a critical component for a positive ROI. If you anticipate growth, you need software that scales with your organization. Otherwise, you will need to invest in an entirely new system when your company expands beyond your contact center technology capabilities.

"THE REALIZATION THAT'S BEEN MADE BY TECHNOLOGY EXECUTIVES IS, THEY'RE NOT IN THE DATA CENTER BUSINESS, THEY'RE IN THE CUSTOMER BUSINESS."

BRUCE PLUMMER,
Principal Solution Consultant, Five9

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Section 5: Foundational Elements to Remember

Scalability, Security and Stability – What to Look Out for

Changes in your business's structure, increases in employee numbers and customer traffic, new contact channels, and expanding AI and automation requirements can all lead to the need to expand services. Choosing a company that allows fluid and flexible service options is often the most cost-efficient, long-term solution.

Scalability

Scaling on-premises solutions isn't easy. It often requires more licensing, increases in server capabilities, and changes in operating system capabilities. On the other hand, cloud-based solutions often have scalability baked into the system. Providers offer a wide range of services, allowing customers to choose and change options as needed.

With the ever-evolving digital landscape, contact center technologies continue to expand and evolve as well. Cloud-based providers are generally more responsive to these changes, folding in new tools, services, and capabilities as they become available.

Security

According to IT Governance, cyberattacks and data breaches exposed an estimated 408 million records in the U.S. in 2022. Security is an ongoing and growing concern globally and across industries.

On-premises technologies store data in-house. Data security threats generally arise from within through employee theft or unauthorized access. However, these systems require you to invest in more physical security for your premises than cloud-based systems.

Data security is a concern with CCaaS and CPaaS systems. You need to understand and feel confident about the security measures the provider employs. Maintaining secure cloud and communications transmissions requires dedicated processes, oversight, and upgrades. Though investing in a platform with robust security measures bumps up the cost, ongoing threats necessitate this investment.

Section 5: Foundational Elements to Remember

"ONE OF THE BEAUTIES OF CLOUD TECHNOLOGY IS IT ENABLES THE USE OF MACHINE LEARNING, ARTIFICIAL INTELLIGENCE AND DEEPER DATA INTEGRATION."

GREGG JOHNSON,
CEO, Invoca

Five9 The Intelligent CX Platform

"Security itself is multi-layered, so there are a lot of different layers to security that you have to consider. The biggest one in the context of AI is data privacy. What is happening to your data? Where is it going? Who has access to it? AI technologies today don't run in silos. They run inside very large companies with very large models. So what you want to make sure of is that your own data is not going into one of these very large models without your explicit consent."

— Panos Kozanian, EVP of Product Engineering, Five9

If you opt for a cloud-based solution, ensure you choose a provider that implements third-party security standards – such as SOC2 – as a baseline, with additional security features incorporated into the system. Additionally, make sure the company complies with other relevant standards for your industry, such as PCI and HIPAA.

Stability and reliability

Reliability and stability are critical to contact center and CX efficiency. When the system goes down, your contact center can't function, and customers are left hanging with unresolved issues or unanswered questions. Employees are idle, and customers get frustrated. In these cases, your business loses money and potentially credibility.

On-premises contact center and CX solutions can be very stable if your infrastructure is stable. Reliability also varies across systems. Additionally, on-premises systems require IT staff to manage the system, installing upgrades, updates, and patches to ensure security and functionality. Maintaining these systems can take your contact center offline, sometimes interrupting business operations for an extended period.

Though planned outages are necessary for maintenance, they should occur during typically slow traffic periods, with notifications informing customers about the downtime before and during the scheduled outage. Your CCaaS provider should have enough capacity to provide stable connections, regardless of the traffic levels your contact center experiences.

Section 5: Foundational Elements to Remember

> "ONE OF THE BIG THINGS THAT WE STAND FOR AT FIVE9 IS OUR LEVEL OF SERVICE AND THIS IS REALLY THAT CONTACT CENTERS ARE NOT AN ISOLATED PART OF YOUR BUSINESS. AND THAT MEANS THAT WE HAVE TO BE PARTNERS IN THAT BUSINESS."
>
> **PANOS KOZANIAN,**
> EVP of Product Engineering, Five9

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How to Negotiate a Service Level Agreement (SLA)

The SLA is a company's promise to deliver an agreed-upon service level when you purchase the product. The agreement should specify the company's security, reliability, and stability guarantees. It should also identify disaster recovery measures.

During the negotiation process, ask the company to provide details. The level of detail the company is willing to provide is a good indicator of its stance on transparency and trustworthiness.

You should also know what you need from the company if an outage significantly impacts your business. During the negotiations, take a deep dive with the vendor to ensure you understand precisely what they provide. Don't accept vague details or impossible promises of 100% uptime.

Section 5: Foundational Elements to Remember

Final Thoughts

Not all cloud-based services have the same offerings and service levels, so comparing providers is essential. When examining the differences between cloud-based providers, you should evaluate the same factors we identified in our comparison of on-premises versus cloud-based solutions. Each of these factors also impacts pricing and ROI for CCaaS and CPaaS solutions:

Features and functionality

Software features and functionality weigh heavily in cost. Some providers may not offer functionality for the full suite of channels, or you may not have the option to choose the channels you use. The level of AI functionality impacts pricing, as does workflow automation capabilities. Differences in core features, such as workforce management and engagement tools, inbound/outbound call capabilities, routing options, and the level of tech support, lead to price fluctuations within and between service providers.

User parameters

User parameters also significantly impact how much you pay for contact center and CX technologies. Understand your needs before choosing a CCaaS provider. How many employees do you have, and do you anticipate growth? Determine whether the company employs a named user or concurrent user structure or if you can choose.

Integrations

Integration capabilities impact pricing structures. The more integrations you require, the higher the cost you can expect to pay. However, if the integrations work well, the efficiency you get from seamless and streamlined tools and processes saves you money in the long run. Investigate how many native integrations they offer and whether they have API capabilities.

Companies with both options provide the greatest flexibility and ensure you can incorporate all the tools your contact center currently uses and any you might need in the future.

Scalability

It takes more backend work from the developers to provide scalable software, impacting pricing. However, the ability to scale is more efficient in the long term, potentially increasing your ROI significantly. Consider ease of scalability among CCaaS and CPaaS providers.

Section 5: Foundational Elements to Remember

Security

A lack of sufficient protection can result in significant financial and reputational losses if a data breach or cyberattack occurs. Though tighter, redundant security measures impact pricing, the cost is worth it. Look for companies that are transparent about their security features and ensure they comply with relevant legal and third-party security and privacy protocols.

Stability and reliability

A CCaaS platform's stability and reliability impact cost and ROI. Examine the service level agreement to ascertain the uptime guarantee. However, be wary of any company that promises 100% uptime performance. No platform is perfect. Even a platform like Five9, which has an excellent availability record, won't go as far as a 100% guarantee. Instead, the company has a 99.999% SLA guarantee and can provide evidence that it meets this high service level. (Panos 1:04)

Your initial long-term costs will depend on how effective and efficient the provider is in delivering services, managing infrastructure, and handling any issues that arise. A cloud-based solution can provide an excellent ROI if the company adheres to high operating and service standards and delivers the features and flexibility you need.

"YOU FIND THAT A LOT OF THESE LARGE ORGANIZATIONS WANT TO USE THE DATA BEYOND JUST THE CONTACT CENTER, LEVERAGE IT DOWNSTREAM IN BUSINESS INTELLIGENCE OR DATA LIKE PLATFORMS OR OTHER MEANS OF ANALYTICS."

DAVE KING,
VP of Sales, Aceyus

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Section 5: Foundational Elements to Remember
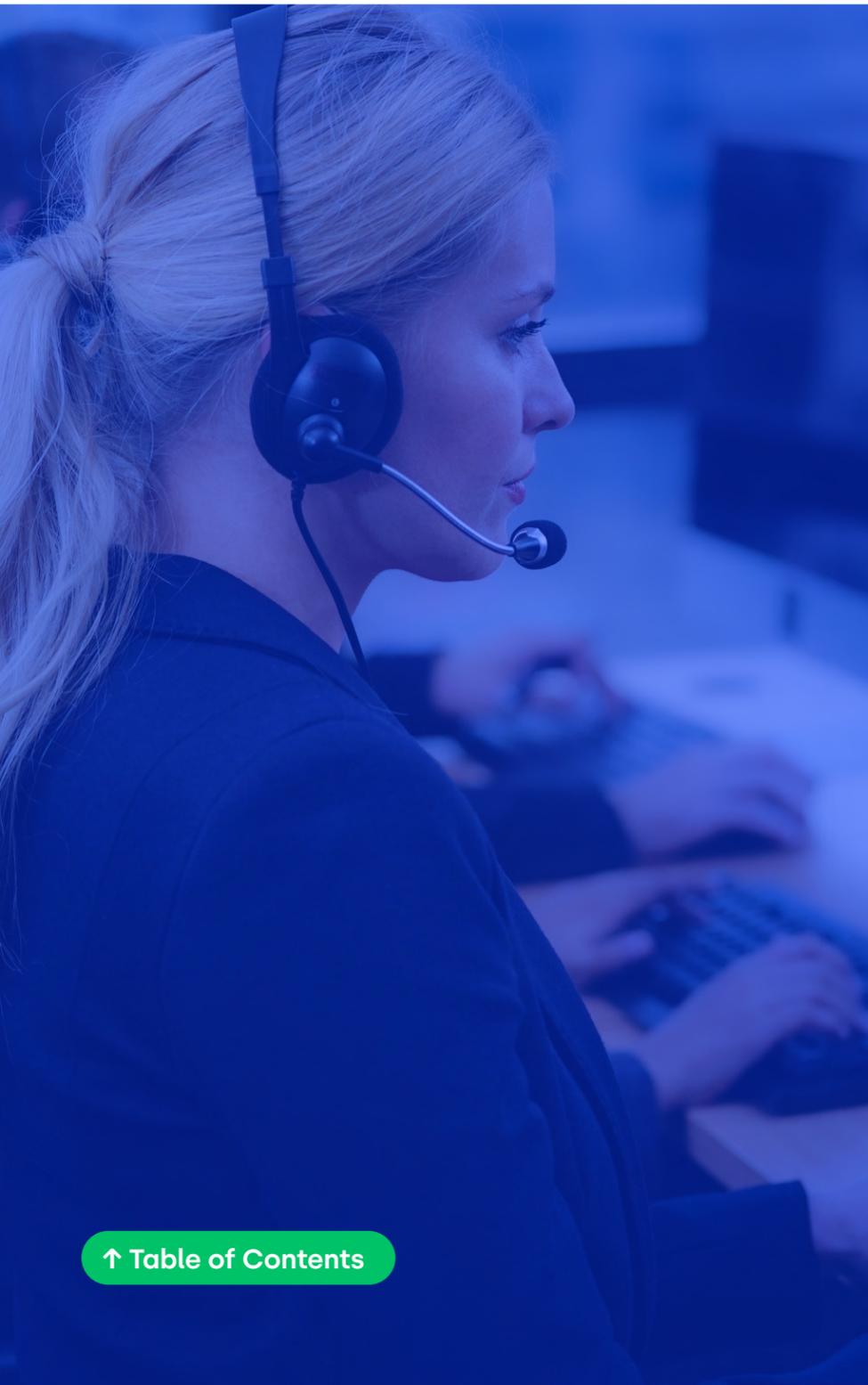
Asking the Right Questions in Your RFP

To get to the core of a company's approach to contact center and CX technology and the features they offer, you should pose questions that require the vendor to provide details on its services. While the company website might describe services and system capabilities, you should seek more detailed information. Here are 10 questions to include in your RFP:

1. **What's your philosophy on CX, and how does your software help deliver a superior CX?**

2. **Can you explain how your system handles cross-channel contact and information? Technologies?**

3. **What role does AI play in your core offerings, and how long have you utilized the technology in your CX?**

4. **Do you use a single AI engine vendor or incorporate multiple engines for varying purposes?**

5. **How do you handle migrating from one provider to another or from a premises-based to a cloud-based solution, and how long does the process typically take?**

6. **What kind of support do you provide during migration and after implementation?**

7. **What security and compliance methods do you employ?**

8. **What's your SLA, and how do you handle disaster recovery?**

9. **How do you support workforce engagement and EX?**

10. **How does your company stay ahead of developing technologies?**

If the vendor doesn't respond sufficiently, don't be afraid to ask for more information. If they can't provide in-depth information, move on to another provider.

Section 6

Avoid Common Pitfalls

Section 6: Avoid Common Pitfalls

The best way to avoid common pitfalls is to fully prepare for the transition to a new provider or from on-premises software to a cloud-based CCaaS provider. Determine what systems you currently use and which ones have fallen by the wayside so you only transfer what you need. Understanding what you need from your CCaaS provider improves migration efficiency.

Before you transition to the cloud, know who's responsible for the process at each stage. You should also be able to track progress and responsibilities so that you understand what's happening with your system, especially if something goes wrong.

Set your expectations high, but don't expect perfection. Pick a vendor who focuses on the technology and the people to support you along the way. An outage or setback is always made worse if you have to go it alone or don't get the right communications from your provider.

The Top 5 Hidden Costs to Consider

One of the biggest pitfalls contact centers encounter when transitioning to a CCaaS is that they don't understand or know how to look for hidden costs. These five hidden costs are the most common and most overlooked:

01
Transitioning before completing an audit resulting in slower migration times and inadvertently losing a service because it doesn't make the transition

02
Inaccurate agent calculations, resulting in more concurrent or named licenses than necessary

03
Foregoing automated workflows often leading to higher labor costs and inefficient operations

04
Choosing flexible over fixed bids, which often start at a low price but require add-ons that bump up the price significantly, sometimes on the order of millions of dollars

05
Telecommunications expenses left out of CCaaS services budgeting and negotiating considerations

By being aware of these potential costs, you can stay on budget while getting the services you need.

Transitioning to a CCaaS platform can take your contact center operations to the next level, edging out your competitors and providing an amazing customer experience. Understanding your needs and choosing a provider and services that work for your business ensures you get the best ROI for your investment.

Glossary

A

AI: Artificial Intelligence. AI simulates human intelligence processes in computers and other machines. These systems use extensive datasets to "train" the machine's algorithms to perform cognitive skills by looking for patterns and correlations in the data. Contact center AI programs can provide customer assistance and complete specific workflow tasks.

API: Application Programming Interface. An API is an interface that links two software components, enabling the exchange of information between them. This arrangement enables an application to "talk" to a server to retrieve data and perform functions, which allows contact center software to integrate with other software a business uses.

C

CCaaS: Contact Center as a Service. CCaaS offloads a significant percentage of contact center technology to a provider. The vendor manages the system, alleviating the need for dedicated equipment and personnel. The contact center pays for the services they require to operate the business. CCaaS is a cloud-based service. Thus, the contact center accesses services via the Internet.

CPaaS: Communications Platform as a Service. Like CCaaS, CPaas is a cloud-based model that delivers communication services. Companies can choose which communication technologies to add to their business operations and link to other software applications.

CRM: Customer Relationship Management. CRM software integrates prospect and customer data into one tool. Using the system alleviates the need to juggle multiple documents, forms, and spreadsheets and makes tracking and analyzing prospect and customer interactions and engagements easier.

CTI: Computer Telephony Integration. CTI technology integrates a contact center's telephone system with other business applications. The software enables efficient routing and provides personnel with more customer information, creating a path for a positive customer experience.

CX: Customer Experience. CX refers to any steps a company takes that impact customers' interactions and perceptions about their interactions with the business and its products or services. A positive customer experience usually results from a customer-first engagement approach.

E

Embedded AI: An embedded artificial intelligence program is integrated into the structure of another system. Its capabilities and processes are already linked to the system. Often, the AI is already trained on specific data relevant to the system it's a part of.

EX: Employee Expereince. EX refers to any steps a company takes that are focused on their employees day to day experiences. In the case of contact centers the EX normally refers to the day-to-day experience of the agents. A positive employee experience normally helps improve the companies customer experience.

G

GPT: Generative Pre-trained Transformer. GPT is a neural network computer learning model that simulates human language or human-produced art and music. It combines transformer architecture and artificial intelligence to answer questions or produce text and other content.

H

HIPAA: Health Insurance Portability and Accountability Act. HIPAA is a federal law enacted in 1996. Its purpose is to protect patients from the disclosure of sensitive health and personal information. The rule applies to the healthcare industry and covers data security and privacy. Covered entities are responsible for maintaining data security and privacy and are legally liable for breaches.

Glossary

I

Intelligent routing: IR uses AI and automation IR uses AI and automation technologies to route customers to the appropriate department and personnel after contacting a business. The technology gathers information about the customer and the customer's needs or issues from any communication channel, then utilizes rules to route the customer to an agent who can help, reducing wait times, the number of transfers, and the amount of time it takes to resolve an issue.

IT: Information and Technology. IT refers to the combination of computers and other devices, networks, software, and hardware to store, manage, transmit, process, and access information. These systems can be complex and often require dedicated and trained staff.

IVA: Intelligent Virtual Agent. IVAs are applications that use AI to perform tasks a human agent performs. The IVA is trained on data that allows the technology to respond to questions and resolve common issues customers have. Contact Center employs IVAs across digital and voice channels.

IVR: Interactive Voice Response. IVR is an automated phone system that can provide immediate customer assistance to callers. The caller responds to prompts from the system, and the system responds by providing recorded information based on the customer's response.

K

KPI: Key Performance Indicators. Companies use KPIs to measure specific business performance objectives. Management personnel usually determine which quantifiable indicators to track progress toward a goal over time.

M

MMS: Multimedia Message Service. MMS is a texting technology allowing users to send multimedia messages such as videos, photos, website links, and emojis on a texting app.

N

Native integrations: Where API integrations require a bridge to link an app to a platform to access data, native integrations don't need an API. The two systems use the same database. The benefit of native integrations is that there's no intermediary limiting data access and functionality. The information exchange is seamless. Additionally, with access to the same database, any alterations or updates are immediately effective.

O

Omnichannel: Omnichannel is a customer engagement approach incorporating multiple interaction and contact channels. Companies make their products, services, and customer service features available on multiple devices, channels, and platforms. Prospects and customers can access the information they need via their preferred methods and switch seamlessly between channels.

P

PCI: Payment Card Industry. PCI refers to compliance with the Payment Card Industry Data Security Standard. These standards establish requirements for any business that transmits, processes, or stores credit card data to maintain a secure system that protects customer financial and personal information.

R

RFP: Request for Proposal. An RFP is a request for a bid from a company to provide a specified service or product. The proposal outlines the company's needs and the required products and services that meet their needs. It should also cover processes associated with acquisition, such as timelines, onboarding processes, and terms and conditions.

ROI: Return on Investment. ROI is a measurement for comparing expenses to profits. There are multiple ways to measure ROI, ranging from simple to complex. ROI values can change over time, requiring companies to evaluate performance regularly.

Glossary

S

SDK: Software Development Kit. SDK is a set of tools that allows developers to build applications for a specific platform quickly. These kits are often used to customize or create integrations so that they may include an API.

Self-Service Technologies: SSTs include any technology that enables customers to interact with a business to resolve an issue, purchase a product, find information, or answer a question without human assistance. A vending machine is a self-service technology, as is a digital shopping cart. Digital self-service tools provide flexible and fast customer service options and can improve CX.

SLA: Service Level Agreement. SLAs provide detailed information on the level of service a customer can expect from a service provider, including remedies or penalties for failing to service standards. It should indicate which products and services the provider will deliver, the metrics used to measure service delivery performance and the company's contact person.

SMS: Short Message Service. SMS is the technology that allows device users to send text messages. Usually, texts are limited to 160 characters and can't include non-text attachments.

SOC2: Service Organization Control Type 2. Unlike HIPAA compliance, SOC2 is voluntary. The American Institute of CPAs developed these standards for the service industry. They provide a framework for protecting consumer data and cover security, privacy, confidentiality, access, and processing integrity.

U

UC: Unified Communications. UC systems refer to the software, hardware, and services used to integrate multiple communications channels within a company's operations. UC products often include mechanisms for sharing content, messaging between personnel, voicemail, email, and video and voice communications. These systems also often connect to other business applications, IT services, and networks.

W

WEM: Workforce Engagement Management. WEM is an employee engagement approach and system that utilizes multiple methods to keep contact center agents engaged throughout their employment lifecycle. Companies use these systems to improve employee performance and job satisfaction. The WEM concept is similar to CX but for agents rather than customers. These systems employ automation and AI for scheduling, agent assistance, training, call routing, and call recording. They usually allow employees flexible scheduling and may incorporate incentives and gaming.

WFO: Workforce Optimization. WFO is the precursor to WEM, focusing on optimizing employee productivity. The focus is on efficiency, rather than the agent's experience.

Workflow automation: Workflow automation technology shifts tasks and processes from humans to software. These programs often execute the mundane aspects of a job, freeing contact center agents and managers from manually performing them. Effective workflow automation software increases efficiency and productivity.

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

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