

# Five9 Adapter for Salesforce

Engage with customers through voice, email, and chat – all within a single Salesforce Lightning desktop.

## What is It?

By uniting the Five9 cloud contact center with Salesforce Sales Cloud and Service Cloud solutions, Five9 provides a single-pane customer sales and service platform that enables agents to focus on the customer experience. Organizations using the combined solution improve customer satisfaction, increase agent engagement, increase sales, and drive inefficiencies out of the business.

**"Five9's integration with Salesforce is amazing. It's really enabled our business to move fast and be agile."**

**Geoff Howard**, Executive Vice President of Technology  
National Funding

## One Platform for a Seamless Experience

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

## Single-Pane Agent Solution

The Five9 Plus Adapter for Salesforce combines contact center controls with the Salesforce solution to provide a single environment for agents to help customers.

Agents no longer have to switch between applications and Salesforce to engage the customer and meet their needs.

## Single-Pane Supervisor Solution

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

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

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

In addition, these insights are delivered to the agent so the agent understands customer intent and can accelerate the customer journey to the right outcome.



## Works With

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

## Five9 and Salesforce Features

### Five9 Genius

- Omnichannel
- Voice, chat, and email
- Skills-based routing
- Route escalations from Einstein Bot
- Use of Einstein for lead qualification and sentiment analysis

### Agent Desktop

- Single-pane Agent Desktop
- Click-to-dial functionality
- Call history and recording
- Interaction handling controls such as priority over preview, pending state, voicemails, and more
- Single sign-on
- Kick off Lightning Flow with interaction delivery

### Supervisor Desktop

- Real-time Five9 agent monitoring within Salesforce

### Outbound

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



## One Platform for a Seamless Agent and Supervisor Experience

Five9 delivers customer intent and journey context, even starting a Lightning Flow, giving agents the insights they need to accelerate the customer journey to the right outcome. Supervisors can define and be notified of specific events from within Salesforce. For example, if an agent in training has a long call supervisors can listen, chat, whisper, or barge in on the agent's call from within Salesforce.

## Einstein Bots

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

## Lightning Flow

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

## List Synchronization

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

## Streamline Sales Operations

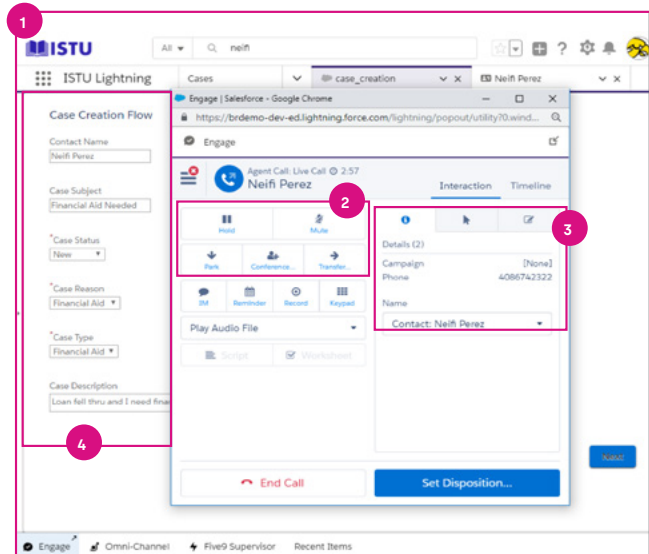
Leverage Einstein for lead scoring and sentiment analysis and use that data to better route interactions, execute outbound campaigns, and inform sales representatives on next best action.

## Powerful Outbound Dialer

Integrated into Salesforce, the Five9 solution brings powerful outbound dialer capabilities to bear for your sales organization. The Five9 Predictive Dialer automates outbound dialing

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

David Muttiah, Change Manager  
CARFAX



and triples the amount of time your agents spend talking to real prospects and customers. Five9 supports predictive, power, progressive, preview, and TCPA manual touch dialing.

## Better Insights

Five9 supports Einstein Analytics making it straightforward to pull data from Five9 into Einstein Analytics to give you a holistic view of your customer service and sales operations. Contact center managers can create customized reports at regular intervals, or on an ad hoc basis, in real time.

Five9 provides powerful analytics that keep everybody on the same page. Agents can understand business expectations and their performance. Supervisors can use real-time data to adjust queues and make smarter, more informed decisions.

**To schedule a live demo or find out more information, visit [www.five9.com](http://www.five9.com) or call 1-800-553-8159.**

1. Single-pane seamless desktop
2. Full phone controls
3. Configurable customer context from self-service
4. Lightning Flow with customer intent and context provided by Five9 Genius



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## About Five9

Five9 is the leading provider of cloud contact center solutions, bringing the power of the cloud to more than 2,000 customers worldwide and facilitating more than five billion call minutes annually. Five9 helps contact centers increase productivity, boost revenue, and create customer loyalty and trust.

For more information visit [www.five9.com](http://www.five9.com) or call 1-800-553-8159.

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