

Google Cloud



Five9

An Introduction to core Five9 CCaaS Components

March 21st, 2025



Five9

Google Cloud

Pre-Workshop Sessions (virtual)

These sessions will be recorded and shared with the team to work around everyone's calendars.

An Introduction to core Five9 CCaaS Components (March 21st) [60 mins]

- Contact Routing
- WEM
- Outbound Dialer
- Agent Workspace
- Call recording

CES: Speech (STT, TTS, Voices) and GenAI foundations initiatives (March 27th) [60 mins]

- Review key customer and agent facing AI features

CES + Five9 feature and technical Overview (April 1st) [60 mins]

Agenda Friday March 21st (EDT) - Remote

	Time	Session Title	Duration	Overview
1	10:55 - 11:00		5 min	Arrivals
、	11:00 - 11:05	Kick-off & Five9 Welcome	5 min	Google Lily Britt - Account Executive Five9 Derek Baker -Sr Majors Sales Director
2	11:05 - 11:55	Introduction to core Five9 CCaaS Components Digital Assistance Voice Assistance Agent Assist Agent Efficiency (Agent Workspace) CRM SDK and ADT+ CRM Integration Agent Assist Outbound <ul style="list-style-type: none"> • Compliance Outbound Strategy, • Marketing, Collections, Notifications Performance Management Recording/QM/Coaching Analytics – Speech and Desktop Workforce Management (WFM)	50 min	Five9 Jason Brown – Director, Solutions Consultants Five9 Bruce Plummer – Principal Solutions Consultant
	11:55 - 12:00	Five9 - Platform Overview	5 min	Five9 Executive PM

Voice Engagement

Agent Efficiencies

- Customer receives fraud alert SMS
- Customer authenticates via Voice Bio
- Reduced handle time
- Process compliance
- Representative upsells based on conversation context



Five9 VoiceStream

Description

- A RESTful API that provides real-time audio streams as well as Computer Telephony Integration (CTI) events and metadata for agent and customer call interactions
- VoiceStream can be used by:
 - Five9 ISV Partners who want to offer Five9 customers their Biometrics, AI/Agent Assist or Speech Analytics solutions
 - Five9 customers who want to build their own or leverage a 3rd-party solution

Features

- Highly secure: uses OAuth authorization flows and encryption, HIPAA compliant
- Easy to configure and deploy via Five9 Admin Console

Benefits

- Choose from a broad portfolio of Five9 accredited partners to enable Voice Biometrics, Real-Time Speech Analytics, and AI applications on your contact center
- Easily configure VoiceStream for the desired partner or a 3rd-party solution



Routing

After routing orchestration, interaction is placed in a Queue.
Queue can contain 1 or more Skills, or multiple attributes

The screenshot shows a configuration interface for routing. It includes a 'Distribution Settings' section with a 'Distribution Method' dropdown set to 'Attribute Proficiency', and an 'Attribute' dropdown set to 'CSAT Score'. Below this is the 'Routing Strategy (Optional)' section, which has a 'Name' field set to 'Enterprise Calls Routing Rules' and a 'Description' field with the text 'This is a test to see if the routing works'. There is an 'Edit Columns' button. A table below shows routing rules with columns for 'Rules', 'Queue Wait Time', 'California Team', 'Arizona Team', 'Enterprise Calls', and 'Eligible Configured Users'.

Rules	Queue Wait Time	California Team	Arizona Team	Enterprise Calls	Eligible Configured Users
1	<= 00:10:00	✓	-	>= 20	27
2	IN 00:00:10 - 00:00:20	✓	-	>= 10	56
3	IN 00:00:10 - 00:00:20	-	✓	>= 10	72
4	>= 00:00:20	-	-	-	286

Interaction Distribution Order
(When multiple calls are queued)

Select your preferred algorithm, based on:

Priority Level, Agent Skill Level, Wait Time, Queue Rotation

Agent Distribution
(When multiple agents available)

Select your preferred ACD algorithm, from:

Longest Wait, Longest Wait (non-manual), Round Robin, Min Calls Handled, Min Handle Time

Queues



Q_EveryDayBankEnglish

Done

General

Users (5)

*Required | Min = -2,147,483,648 | Max = 2,147,483,647

Distribution Settings ⓘ

Distribution Method ⓘ

Attribute

Routing Strategy (Optional)

☒ Activate

Name

Description

*Required



Edit Columns

Rules	Queue Wait Time	# EverydayBankEnglish	Eligible Configured Users	
1	<= 00:00:15	= 15	2	:
2	> 00:00:15, <= 00:00:20	>= 7	3	:
3	> 00:00:20, <= 00:00:30	>= 6	4	:
4	> 00:00:30	>= 1	5	:

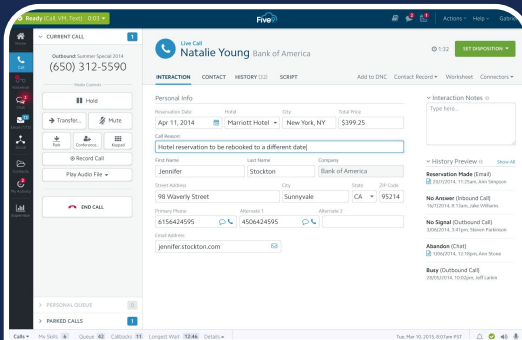
Agent Workspace

Agent Agent Workspace

- Agent Desktop Plus (ADP)
- Agent Desktop Toolkit (ADT)
- Five9 approved pre-built integrations
- CRM SDK
- Messaging API

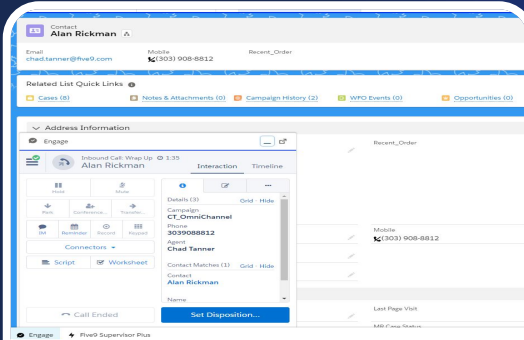


AGENT DESKTOP, YOUR WAY



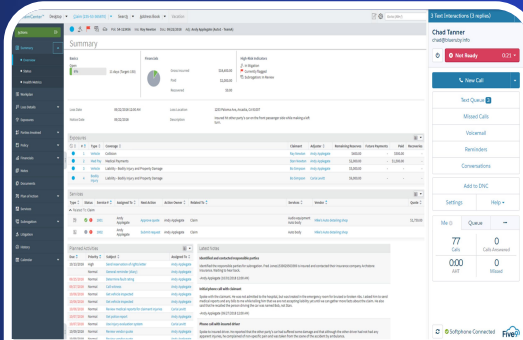
Agent Desktop Plus

Full screen web application with embedded screen-pops (Connectors) to the business applications your need



CRM Adapters

Pre-built connectors to leading CRM vendors – Salesforce, MS Dynamics, ServiceNow, Zendesk, Oracle & more



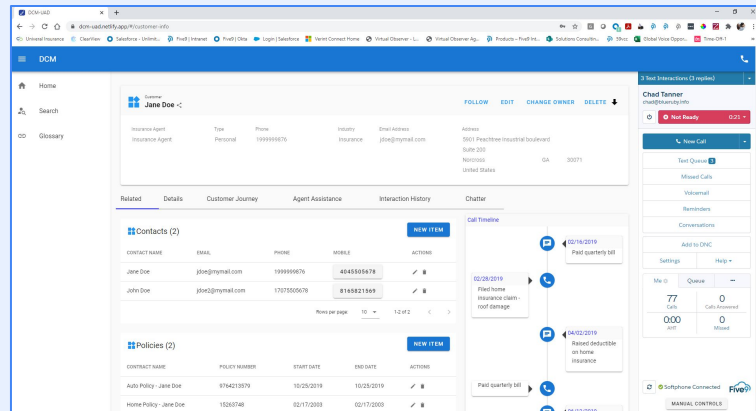
Agent Desktop Toolkit

Embed agent controls within your custom business application with ADT and Five9 CRM SDK

Five9: Agent Desktop Toolkit

Integrate the agent omni-channel experience directly into your CRM

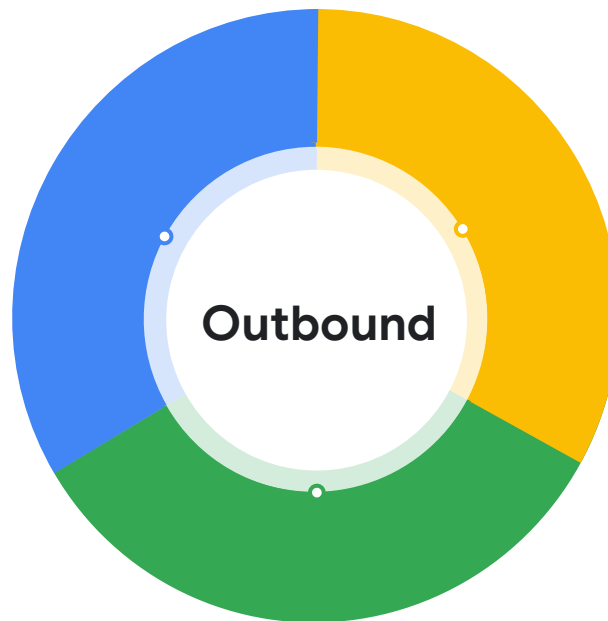
- Quick to deploy fully featured Agent Desktop Toolkit with fully flexible JavaScript CRM SDK.
- Perform full contact centre functionality with embedded controls within your chosen business application
- Contextualised, customised screen-pops across ALL channels
- Interaction logging into CRM
- Including all associated metadata, Recording link, Call Transcript & Summary
- Click-to-call and SMS



- **Create a seamless agent experience within the native CRM environment.**
- **Minimize agent ramp-up time.**
- **Connect CRM and contact center data for a single source of truth.**
- **Deploy quickly and manage easily.**

Dialing Modes

Campaign Management



Compliance

DCM

- Home
- Search
- Glossary

Customer
Jane Doe
[FOLLOW](#)
[EDIT](#)
[CHANGE OWNER](#)
[DELETE](#)

Insurance Agent	Type	Phone	Industry	Email Address	Address
Insurance Agent	Personal	1999999876	Insurance	jdoe@mymail.com	5901 Peachtree Industrial boulevard Suite 200 Norcross GA 30071 United States

[Related](#)
[Details](#)
[Customer Journey](#)
[Agent Assistance](#)
[Interaction History](#)
[Chatter](#)

Contacts (2)

NEW ITEM

CONTACT NAME	EMAIL	PHONE	MOBILE	ACTIONS
Jane Doe	jdoe@mymail.com	1999999876	4045505678	✎ 🗑
John Doe	jdoe2@mymail.com	17075505678	8165821569	✎ 🗑

Rows per page: 10 1-2 of 2

Policies (2)

NEW ITEM

CONTRACT NAME	POLICY NUMBER	START DATE	END DATE	ACTIONS
Auto Policy - Jane Doe	9764213579	10/25/2019	10/25/2019	✎ 🗑
Home Policy - Jane Doe	15263748	02/17/2003	02/17/2003	✎ 🗑

3 Text Interactions (3 replies)

Chad Tanner

chad@blueruby.info

[🔔](#)
[🔴 Not Ready](#)
0:21

New Call

Text Queue 3

Missed Calls

Voicemail

Reminders

Conversations

Add to DNC

Settings

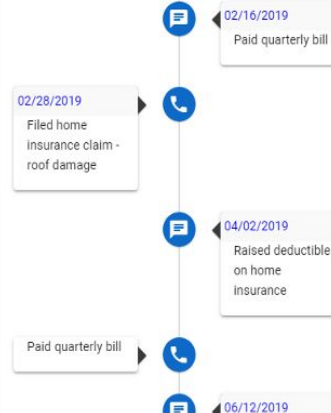
Help

Me	Queue	...
77 Calls	0 Calls Answered	
0:00 AHT	0 Missed	

[🔄](#) Softphone Connected
 [Five9](#)

MANUAL CONTROLS

Call Timeline



Digital Engagement



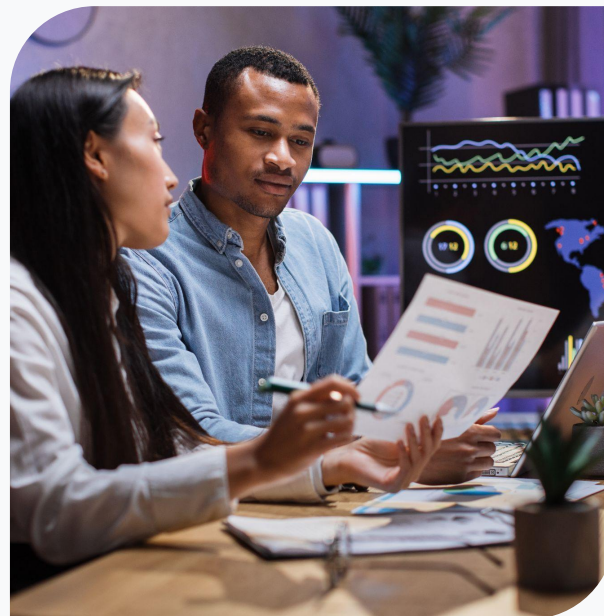
Customer visits American Express website for rewards question



Customer questions are answered by LLM powered virtual agent

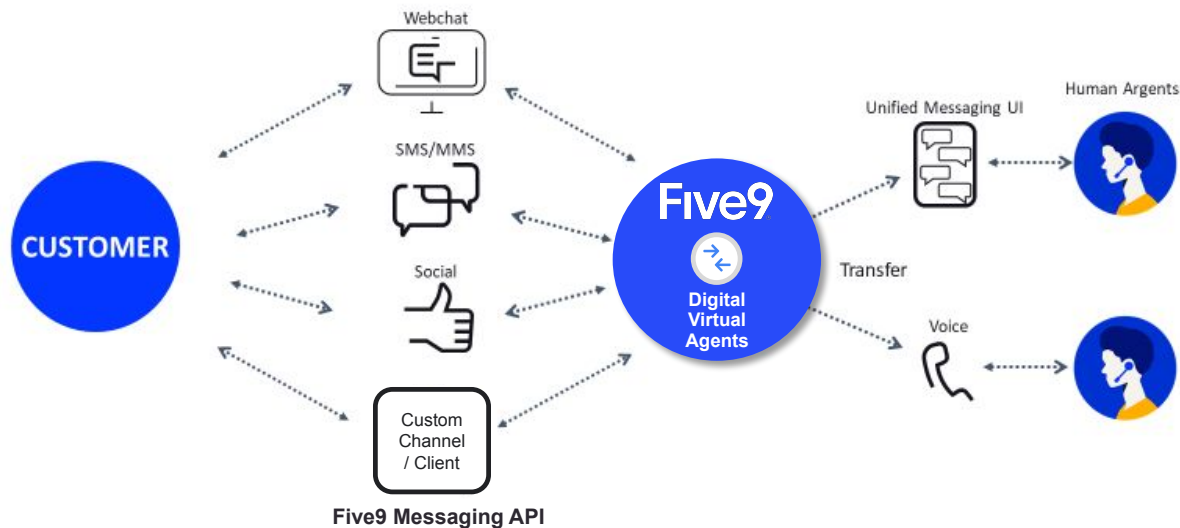


Chat transferred to Representative with context



FIVE9 MESSAGING

Offering a unified experience across all messaging channels









Key Benefits

- Consistent experience across all channels
- Allow “BYO” Messaging channel and chat client through Messaging API

Dialing Mode Details

Choose and configure your Dialing mode based on the needs and nature of your Outbound Campaign.

					
Predictive Dialing	Power Dialing	Progressive Dialing	Preview Dialing	Compliant Dialing	Agentless Dialing
<ul style="list-style-type: none"> Recommended for campaigns with more than 10 dedicated agents. It has settings for Abandoned Call Percentage and Call Analysis. “Calls-To-Agent Ratio” for this Dialing Mode is automated. It does not wait for agent’s availability. 	<ul style="list-style-type: none"> Recommended for campaigns with 10 calls per agent. Scales to hundreds of agents. In this mode, you can set a fixed “Calls-To-Agent Ratio” for dialing multiple calls per agent. This mode dials when an agent becomes ready for calls. 	<ul style="list-style-type: none"> Recommended for campaigns with less than 10 agents. Dialing is not as aggressive as the “Predictive Mode”. Its “Calls-To-Agent Ratio” varies, depending on agent’s availability. 	<ul style="list-style-type: none"> This mode gives dialing control to agents. This mode does not filter undesired call results, such as busy signals and no answers. No number is dialed until agents preview the contact. Often used in Sales-oriented call centers where agents have more frequent and personal interaction with contacts. 	<ul style="list-style-type: none"> Provides a structured manual-dial that enables the same valuable reporting and control as traditional dialer modes. 	<ul style="list-style-type: none"> This mode automates contacts without agents by leveraging AI-driven Virtual Assistants Perform powerful interactions including self-service, surveys, and more.

Compliance Adherence – Be Safe

TCPA (Telephone Consumer Protection Act)

- Adheres to dialing hours of operation, holidays & individual contact timezones
- State specific capability to configure runtime by day of week
- Connect to agents in 2 secs, 15 secs ring time and maintain 3% abandon
- Play identification message & Opt-out mechanism
- DNC (Do Not Call) & NDNC (National Do Not Call) Registry
- Consent Management for PEWC (Prior Express Written Consent) adherence
- RND (Reassigned Number Database) validation
- Accelerated Dialing for PEWC with Human control & action (Manual, Auto, Operator)
- State specific control for Manual Dialing for Mini-TCPA
- Run time validation & filtering data (DNC, Wireless, Litigator)

Ofcom (Office of Communications)

- Support for 15 sec ring, 2 sec connect, 72 hour reschedule rule on abandon and maintain 3% abandon
- TPS (Telephone Preference Service) & CTPS (Corporate Telephone Preference Service) compliant using DNC capabilities
- Ofcom compliant reports are available

CCPA (California Consumer Privacy Act) & GDPR (General Data Protection Regulation)

- Comply with Right to access to data & Right to pseudonymize data
- API support & Agent Desktop widget to accept on-call CCPA/GDPR requests

CFPB & FDCPA (Regulation F)

- Rules can be written for a Customer (across account & numbers), or for an account or for a specific number
- Adhere to State specific laws, including 7 attempts in 7 days & 1 Conversation in 7 days
- Control Limited Content Voice mail messages
- Call customers on their Preferred Times
- Consent Management for manual dialing

CRTC (Canadian Radio-television and Telecommunications Commission)

- Canadian Government's national Do Not Call Register (DNCL)
- Block commercial electronic messages (CEMs) as per Canada's Anti-Spam Legislation (CASL)

Others

- Windows Platform FIPS-validated cryptographic algorithms. Uses AES Cryptologic algorithm for encryption
- Provisions of Section 508 amendment to the Rehabilitation Act of USA
- Web Content Accessibility Guidelines (WCAG) of the Web Accessibility Initiative (WAI) of the World Wide Web Consortium (W3C)

Campaign & State specific laws

- Rules can be written across campaigns for a Customer (across accounts & numbers), or for an account or specific number
- All rules are campaign & state specific. Different lines of Business can have different rules configured

Green Zone (Safe Harbor) & Scheduling

- Evaluate safe time period to call a customer determining contact timezone using a combination of all available information like numbers (area codes) and zip codes, state codes or a combination of area code and multiple zip codes
- Configure campaign dialing hours of operation, 3 shifts by day of week and yearly holidays
- When multiple timezones are determined the Greenzone (safe period) is determined to call a customer
- Define State specific hours of operation by day of week and state specific holidays

State Prioritization

- When multiple states are identified using Area code and multiple Zip Codes, Compliance rules can be merged across multiple identified States and enforced
- Alternately State Prioritization, allows the order of the States to be adjusted. State (with the most complex laws) at the top of the list of identified States is selected for applying compliance rules

Attempts Tracking (7 attempts in 7 days & 1 Conversation in 7 days)

- Rules can be configured for measuring attempts for rolling days for a combination of outcomes for failed calls (7 attempts in 7 days), successful calls (1 conversation in 7 days), RPC (Right Party Connect), etc.
- Rules can use customer business data like "Due Date" (To call when past due > 27 days)
- Rules can also use the First or Last Attempt in rolling days to control the time between attempts, etc. for the same customer across campaigns
- Rules can be for specific numbers like home, office, mobile, and can also be for specific channels, like Voice, SMS, Email

Voice Mail (Limited Content Message)

- Enable / Disable Voice mail for each mode (number)
- Configure timings when you can leave a voice mail for each number
- API support for IVR to call and follow compliance to whether leave a message, and what type of message

Number (Mode) & Channel Control

- For individual States, enable / disable each mode & Channel (SMS & Email) and define a specific start and stop time
- Enable / disable voice mail for each number as well define a specific start and stop time for leaving voice mail

Customer Preferred Time

- Upload 3 slots by Day of Week of Customer Preferred Times when the customer can be called
- Or even disable calling for a day of the week based on specific customer preference
- Customer calling time preference can be saved for specific campaigns

Consent Management with RND & Accelerated Dialing

- Upload Consent or Non-Consent requests separately for individual channels and specific campaigns
- Specifically control not to leave a Voice mail based on Consent
- Accelerated Dialing, where from the same Campaign, Consent records are Predictive dialed, while Non-Consent records are initiated through Human control & action (Operator mode) and Predictive Dialed, or Non-Consent records are manual Dialed using Direct Preview (Auto mode), or manual Click-to-Call (Manual mode)

DNC / NDNC & Opt-Out

- Opt-out data can be uploaded into DNC tables using available API across all channels (voice, SMS & email)
- Federal / NDNC (National Do Not Call) list can be subscribed from Acqueon or uploaded by the customer
- DNC can be uploaded and managed using numbers or 2 business fields

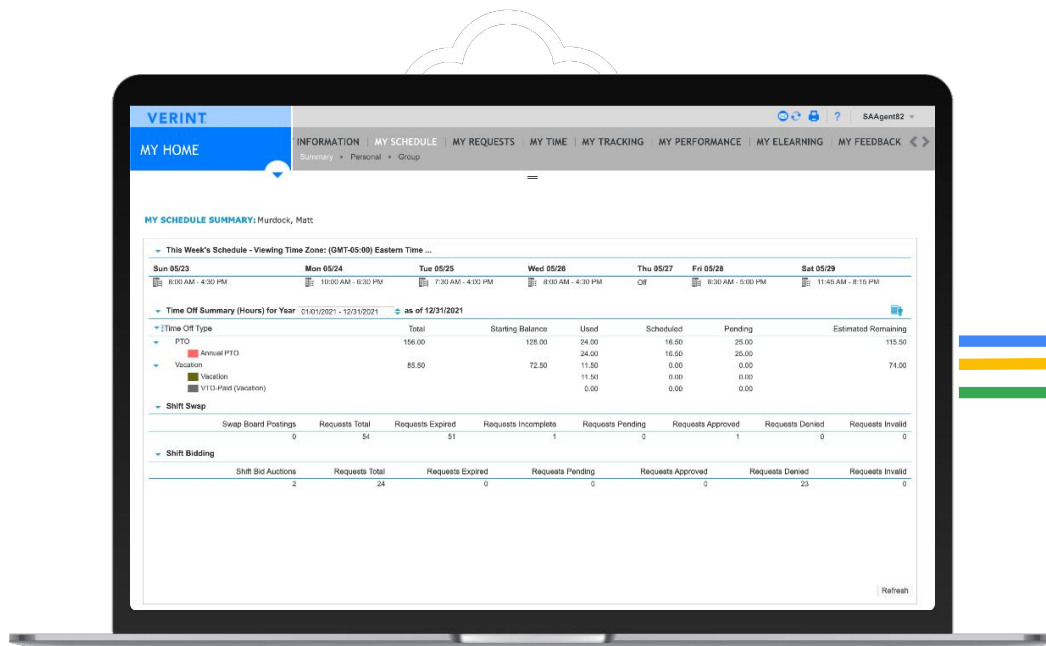
Google Cloud

AMERICAN
EXPRESS

WEM



Five9 WEM - Building a Practice



PRE-SALES

DELIVERY

SUPPORT

Five9 & Verint

Five9 CCaaS w/ Verint at the Core

- Delivered as one product – Five9 CCaaS
- Always on the latest version
- Complete Workforce Offering
 - Recording/Ingesting Interactions
 - Quality Management (Auto Evaluation, Coaching)
 - Analytics (Speech, Desktop, Structured)
 - Performance Management (Goal Oriented, Auto Coaching, Lesson Management...)
 - Workforce Management (Forecasting, Scheduling, RTA, Intraday...)

9 Dedicated Verint Pre Sales SMEs

32 Dedicated Verint Prof Services

8 Dedicated Verint Operations Staff

35 Dedicated Verint Support Staff

15 Dedicated Verint Technical Acct Mgmt

Dedicated Verint Prod Mgmt

150K Users Across 2000 Servers

Five9...

- Implemented
- Supported
- Managed

Five9 Execution

- +90 PS NPS
- +84 CS NPS

Five9 & Verint Together

- Largest Verint Partner/Customer
- 2019 Partner of the Year
- 2020...
- 2022...
- 2023



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Thank you!

