

Five9 CRM Integrations

Maximise your CRM investments by leveraging the power of real-time customer data.

Emphasise CX Across Your Organisation

It's no secret that contact centres use customer relationship management (CRM) solutions to capture, store, and manage customer information. However, contact centre solutions and CRM systems are deployed as two separate applications, creating a disconnected experience for your agents and customers.

Customers want your organisation to know who they are and why they're contacting you. They don't want to repeat themselves or get passed from agent to agent. Agents often juggle multiple applications to identify the customer's information and must guess which system is most accurate. This causes a painful working environment and customer frustration due to long calls, poor customer service, and simple tasks becoming challenging and time consuming.

“ With the integration of our CRM and Five9 it is a big-time saver. We can pull in customer info into the database and average handle times are reduced because we aren't clicking all over the place searching for customer data.”

PPL

Benefits

- Seamless agent and customer experience
- All the relevant customer information at the agent's fingertips
- Accurate customer data and customer interactions
- Quick deployment and easy management

Core Features

- Core telephony controls, single sign-on, standard login
- Support for softphone, WebRTC, PSTN
- Interactive voice response (IVR)
- Screen pops
- Call routing, logging, recording

Provide a Fluid Customer Experience

Five9 offers out-of-the-box integrations with leading CRM solutions such as Salesforce, Microsoft, ServiceNow, Oracle, and Zendesk. If you use another solution, they also enable you to integrate through our CRM SDK.

Integrating Five9 and CRM combines contact centre controls natively in a single, intuitive user interface to capture, view, manage, and share every customer interaction. This combined solution unlocks the power of real-time customer data to drive greater business results — increasing agent productivity and improving customer service.

Make It Easy for Your Agents

Five9 integrations provide agents with a single, consistent experience optimised for your CRM environment, minimizing the learning curve and enabling them to focus on the customer rather than the technology. With screen pops directly embedded within the familiar CRM environment, agents get the information they need to personalise the experience and help maintain the customer's journey. Increase agent productivity, enhance the user experience, and ensure a better customer service experience to give your organisation a competitive advantage.



Five9 enriches the Salesforce experience by delivering powerful, integrated telephony features directly to the familiar Salesforce desktop. Joint customers leverage a computer telephony integration via Open CTI or bring your own telephony (BYOT) integrations to harness the power of Five9 and Salesforce together.

Pre-built integrations enable organisations to boost productivity and improve customer experiences. Whether you favor the Five9 Adapter for Salesforce or Five9 for Service Cloud Voice BYOT, their integrations help your organisation maximise the investments you've already made in Salesforce.

servicenow

Extend the ServiceNow platform to the voice channel with Five9 to delight customers and upskill your service organisation by orchestrating amazing service experiences. Provide the kind of support that drives customer satisfaction and builds a lasting relationship with your customers.

Compatibility support includes Classic and Agent Workspace, Customer Service Management (CSM), and IT Service Management (ITSM), along with support for the latest version releases working alongside ServiceNow product team.s



Enhance contact centre productivity and customer service with a single, unified Microsoft environment. Agents no longer need to switch between different applications and the Dynamics desktop.

Compatibility support includes Channel Integration Framework (CIF) v1 and v2 for multisession applications such as Customer Service workspace and Omnichannel for Customer Service.

With Five9 Agent Desktop Toolkit (ADT), bring the entire agent desktop experience within your CRM solution of choice.



The combination of Five9 and Oracle creates a powerful customer service platform, enabling businesses to digitally transform the contact centre and deliver amazing customer experiences. With screen pops blended directly into the Oracle environment, give agents a complete picture of the customer before they engage. Easy to manage and deploy, this solution can help your organisation get up and running quickly.

zendesk

Integrate your Zendesk solution with Five9 to simplify the agent experience, minimise the learning curve, and empower agents to focus on the customer rather than the technology. This integration creates a powerful customer service platform enabling call management and ticket handling all from a single solution. Compatibility support includes Talk Partner editions.

Leverage Additional CRM Support

If you use a solution we haven't mentioned, Five9 offers an easy-to-implement integration option for any web-based CRM. With Five9 Agent Desktop Toolkit (ADT), bring the entire agent desktop experience within your CRM solution of choice. Additionally, CRM SDK offers a rich, extensible framework of REST APIs, webhooks, reference UI, and other tools to build customised solutions that power agent experiences and business results in turnkey environments. With Five9, leverage the power of cloud contact centre solutions while maximising existing investments.

While each CRM partner may have their own features and functionality, Five9 works directly with product counterparts for joint product alignment. Five9 also offers additional product add-ons such as Intelligent Virtual Agent, Agent Assist, Supervisor Plus, Workforce Optimization (WFO), UC Integrations, and many more to complement your existing CRM solution.

Outbound

- Predictive, power, progressive, and preview dialing
- Synchronisation of customer lists and data

Administration

- Single control point for all channels
- Real-time analytics and historical reporting

UC Integration

- Consolidated CC and UC directory
- Click-to-call, transfer, or conference any UC user

Supervisor Desktop

- Real-time agent monitoring
- Embedded supervisor desktop
- Omnichannel visibility and monitoring

Digital Engagement

- Voice (inbound/outbound)
- Self-service (IVR/IVA)
- Messaging (chat, SMS, social)
- Email

Workforce Optimisation Connector

- Pre-built integration
- Recorded interactions
- Transcript captures of digital channels
- Data-collection handling

Agent Assist

- Real-time guidance, reminders, call transcription, and summaries
- Automated after-call work
- Reporting on call topics based on conversations

Features may vary by CRM partner.

Learn More

Want to learn more about how BT and Five9 can help you reimagine customer experience?

To get started, [contact us](#).

Offices worldwide

The services described in this publication are subject to availability and may be modified from time to time. Services and equipment are provided subject to the respective British Telecommunications plc standard conditions of contract. Nothing in this publication forms any part of any contract.

© BT Communications Ireland Lt Registered office: Grand Canal Plaza, Upper Grand Canal Street

Dublin 4. Registered in Ireland No. 14152
April 2024

