

## Executive Overview

Five9 is an industry-leading provider of the intelligent cloud contact center, bringing the power of cloud innovation to more than 3,000 customers worldwide and facilitating billions of customer engagements annually. We provide end-to-end solutions with digital engagement, analytics, workforce optimization, and AI and automation to increase agent productivity and deliver tangible business results.

- 20+ years of cloud contact center experience
- 2,600+ employees around the world
- 3,000+ customers worldwide
- 350K concurrent agent seats
- 3X YoY growth in global partner sales certifications
- 1400+ global SI, channel, and technology partners
- 2X YoY growth in partner-led implementations
- 6X YoY growth in Agent Assist bookings

## Product & Service Offerings

### Core Cloud

- [Global Voice](#)
- [Agent Desktop Plus](#)
- [Supervisor Desktop Plus](#)
- [Engagement Workflow](#)
- [CRM Integrations](#)
- [UC Integrations](#)
- [APIs & SDKs](#)

### Digital Workforce

- [Artificial Intelligence](#)
- [Intelligent Virtual Agent](#)
- [Agent Assist](#)
- [AI Summaries](#)
- [Workflow Automation](#)

- [Reporting & Analytics](#)

#### Employee Engagement

- [Workforce Optimization](#)
- [Quality Management](#)
- [Workforce Management](#)
- [Interaction Analytics](#)
- [Performance Management](#)
- [Gamification](#)

#### Customer Engagement

- [Inbound](#)
- Outbound
- Blended
- Digital Engagement
- Voice
- Email
- Mobile
- Chat
- Social
- SMS/Text
- Video

## Sales Engineer Take On Best Fit

The Five9 Intelligent CX Platform provides a comprehensive suite of solutions for orchestrating fluid customer experiences. The cloud-native, multi-tenant, scalable, reliable, and secure customer interaction platform includes contact center; omnichannel engagement; Workforce Engagement Management; extensibility through more than 1,000 partners; and innovative, practical AI, automation and journey analytics that are embedded as part of the platform. Five9 is a big 3 CCaaS platform that scales from Mid market to large enterprise accounts. Five9 partners with several UC platforms as well as MSFT Teams for back office communications. Five9 has an impressive NPS score of +67 which means trusted advisors can feel confident bringing them into your CCaaS

opportunities.

- Hunter Edmisten, UC/CC/AI FSE

## Key Features & Differentiators

- **High Touch Implementation:** On-Site Sales and Services for all Enterprise customers
- **Best of Breed Philosophy:** WFO/WFM plus Native Capabilities
- **Easy Omnichannel:** no login/logout required to handle blended interactions
- **Win Rate** >= 70% Against Primary Competitors
- Positioned "Highest Ability to Execute" (Gartner, Magic Quadrant for Contact Center as a Service)

## Top Industries Served

- Financial Services
- Healthcare
- Information Technology
- Other

## Ideal Customer Profile

- 3 to 8000 seats
- Inbound, Outbound, Blended
- Seasonal peaks, Rapid deployments, High growth
- Need better visibility/reporting
- Single or Multiple locations, @home agents
- Multi-channel: email, chat, mobile, SMS, or social
- CRM integrations
- Continuous optimization

### Customers with:

- Single or multiple locations, equipment, & vendors
- Difficult systems to administer, complex to integrate, and costly to maintain
- Aging, overdue for upgrades (Dialer, IVR, ACD/PBX, Call Recording, or WFM)
- Need to use the latest cloud contact center technology Requirement for business continuity and disaster recovery

- Requirement to add the use of email, chat, text, mobile, social or video Platform stability issues

**Require Flexibility & Scalability for:**

- Seasonal peaks
- Rapid deployments
- High growth

**Have Budgetary or Cost concerns:**

- Trying to avoid large upfront capital investments, interested in OpEx financial model
- Only want to pay for what they need and want to scale as they grow

## Qualifying & Technical Questions

- Can you describe a typical customer journey?
  - Describe the current pain points for:
    - Customers
    - Agents
    - Supervisors
    - Managers
    - Reporting
- What are your compliance requirements? PCI, FERPA, HIPPA, FEDRAMP, etc.?
  - Do you handle customer payments? What are your security requirements?
- Are you interested in our Inbound, Outbound, and/or Blended Agent functionality?
- What is you IB and OB call volume?
- What is you peak IB or OB volume?
- Is your call flow digitized and shareable?
- What is your AHT?
- Please describe your OB cadence Does your OB cadence include omnichannel
- Do you use another application for your call cadence?
- Describe your current self-service/IVR/IVA capabilities?
- Are you using Digital Channels today?

- Email, Chat, Web, others... Do you currently use any bots with the omnichannel solutions you have today?
- Do you want your Agents to interact on Social applications?
- Do your Agents interact with your customers via video?
- What are your language requirements?
- Agents and Customers?
- Do you track abandon rates in IVR/Web/Chat etc.?
- What CRM are you/do you plan to use?
  - Is it browser based or custom in-house?
  - Does your current solution have integration points w/ CRM today?
  - Would you like an integration to the CRM for screen pop and reporting?
- If they are using SFDC, which objects do you pull your leads from?
- Do you have a domain?
- Do you need an automated dialing solutions?
- Expressed written consent to call?
- Are you interested in our ACD (inbound routing) with skills-based routing?
- Are you interested in our Dialer with Predictive, Progressive, Power, and Preview dialing?
- Do you need to record calls?
  - Do you need transcripts of your calls?
  - Do you require post call analysis?
  - Sentiment analysis?
  - How long do you need to store/retention period?
  - Compliance requirements?
- Which reporting tool do you currently use?
  - How would you rate your current reporting solution with 10 being the best?
    - Please describe your reporting needs
    - Do you have dashboards on monitors in the Call Center?
- How do you prepare work schedules for your agents today?
  - How long does it take to create schedules?

- Do your agents bid for shifts?
- How do you evaluate agents today?
- Do you have a team that focuses on quality?
  - What do you measure?
  - How do you measure?
  - Do you measure customer experience?

## Elevator Pitch

Positioned as “Highest Ability to Execute” on the Gartner Magic Quadrant for CCaaS, partners trust Five9 to provide white glove, implementation, service and support to their customers. The Five9 customer experience produces dozens of positive customers across verticals such as Healthcare, Finance, Technology, and many others. All the features of the Five9 virtual contact center combined with engaged reference customers and industry expert reviews have produced a 70% win rate against the competition for partners who refer Five9 opportunities.

## Objections & Rebuttals

### Five9 is not the top Leader in the Gartner CCaaS MQ.

Five9 has been recognized by Gartner® as a Leader in the 2023 Magic Quadrant™ for Contact Center as a Service for its offering, the Five9 Intelligent CX Platform. The evaluation was based on specific criteria that analyzed the company's overall completeness of vision and ability to execute.

Five9 was recognized for strengths including:

- AI deployments
- Post-sales service and support
- Expanded capacity to support 10,000+ agents per domain
- Enhancements to its digital channels offering and improved agent assist capabilities

### Five9 doesn't scale as well as CXone

Five9 has customers with over 10,000 agents and continues to grow its seat counts every year.

### Five9 has reliability issues.

Five9 is transparent in posting its trailing 12-months of uptime. Only paying customers can see what NICE's uptime really is.

### Five9 has an old, first generation architecture.

Over the past 2 years, Five9 has updated its architecture to a microservices-based application.

### Five9 only has 2-3 releases a year - Genesys releases 100+

Five9 uses agile development (Cloud Train) to release a steady flow of features to users that we group together into seasonal releases for marketing purposes

**Five9 lacks an app marketplace. Talkdesk lets customers try any app for free.**

Five9 creates strong partnerships with leading firms - any of whom you are welcome to ask about doing business with us. Query Talkdesk AppMarket partners about doing business with Talkdesk

**Five9 doesn't offer a 100% SLA guarantee.**

SLA's are goals, not guarantees. No SaaS solution is 100% all the time. We're at least honest about it

**Five9 doesn't offer an integrated UC/CC package.**

With the Genesys announcement, neither does 8x8 - except in billing. And we do have integrated offers with the major UCaaS and premises UC systems including RingCentral, AT&T, Nextiva, ZoomPhone and others