Five9 Agent Assist

Empower agents with AI-powered intelligence and automation to deliver exceptional customer service.

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This comprehensive guide explores capabilities, real-life examples, and top use cases.

Where We Are Today

Exploring Customer Expectations and the Shifting Contact Center Landscape

Today, customers are more connected and knowledgeable than ever before, and they expect businesses to meet them where they are. They want to be able to interact with businesses on their terms, as quickly as possible, using the channels they prefer, routed to intelligent agents, while being assisted genuinely.

This experience is no longer a luxury, it's an expectation. According to Shep Hyken's 2023 ACA Study, 76% of customers would switch to a competitor brand or company if they found out it was more convenient to do business with.[1]

Here are a few key trends in contact centers:

- **Contact volumes have grown increasingly unpredictable.** According to a Five9 report, more than half of contact centers (55%) reported a surge in the volume of customer interactions over the past 12 months, and 47% reported an increase in contact complexity.[2]

- **Customers now expect to have streamlined, convenient experiences** where the brands they interact with carry the burden of knowing who they are and what they need.

- **Contact center agents need innovative technology** and effective applications to help them keep up with ever-increasing customer expectations.

- **Employers are focusing more on their agents' well-being,** including tools and resources to help support them and avoid burnout.

81% of customers prefer to connect live with an agent, a 14% increase year over year.[1]

Over the past 12 months, how has your contact center's volume of customer contacts/interactions changed?

- Increased — 55%
- Stayed the same — 29%
- Decreased — 16%
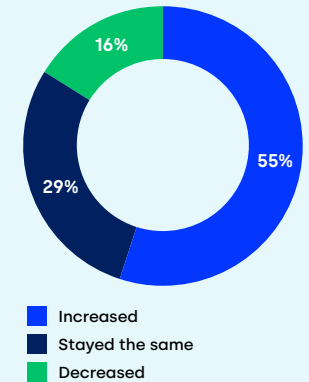
Over the past 12 months, how has the complexity of customer contacts/interactions changed?

- Increased — 47%
- Stayed the same — 46%
- Decreased — 7%
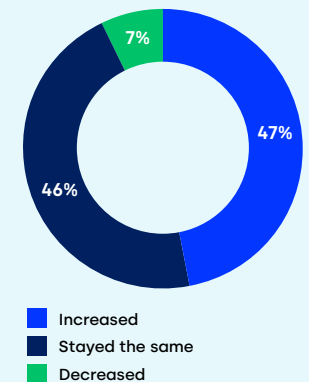
Do you believe your agent-facing applications could be more effective?
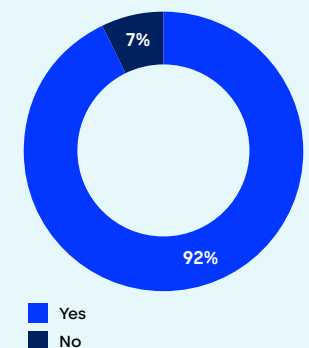
- Yes — 92%
- No — 7%

Figure 1: Contact centers have faced enormous pressure in the last few years to meet the adapting needs of customers.

Taking care of your agents is the best way to empower great customer experiences. It's critical for contact centers to leverage innovative technologies that help agents do their work with less toil, less redundancy, and more freedom to focus on engaging with the customer.

How has the role of the Customer Service Representative changed at your company in the past 24 months? (Select all that apply.)
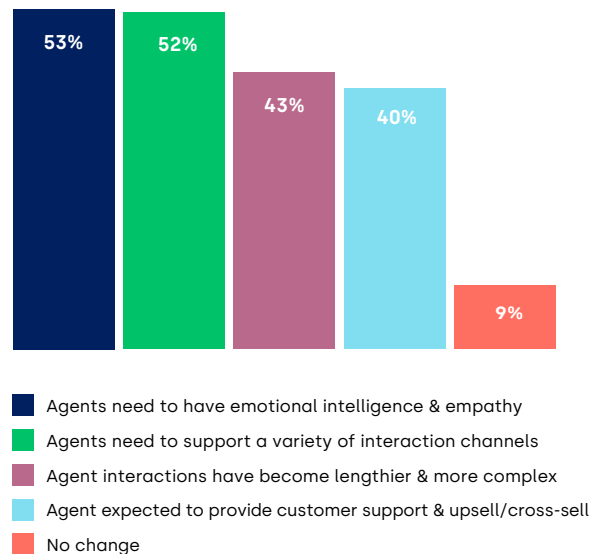

- 53% Agents need to have emotional intelligence & empathy
- 52% Agents need to support a variety of interaction channels
- 43% Agent interactions have become lengthier & more complex
- 40% Agent expected to provide customer support & upsell/cross-sell
- 9% No change

Figure 2: The role of customer service agents has changed significantly in the past 24 months.

Meeting Agents Where They Are

Addressing Contact Center Agent Challenges for a Better Future

Agents are at the core of every customer experience and remain central to contact center success. Why? Because only humans have empathy, complex problem-solving skills, intuition, and the capacity to relate to customers as humans. Human agents are crucial for exceptional customer service — no matter how many technological advancements arise. There's no substitute for human contact when human contact is desired.

Increasing contact volume and complexity of live interactions have exacerbated agent challenges that contact centers have long had: high attrition, long ramp-up periods, unsatisfying rote call work, increasing complexity, and knowledge gaps that are difficult to bridge.

Let's look at how these impact contact centers today.

- **High Attrition:** Studies show that contact centers average 30–45% turnover per year.[3] Additionally, 75% of respondents stated that agent turnover has increased over the past year.[4] Indeed included "customer service representative" as one of its 12 High Turnover Jobs in 2022. The average tenure for an agent is 12–15 months.[5] In the Five9 Customer Service Index 2022 report, 47% of contact center executives cited retention as their biggest challenge.[6] The average cost to replace an agent is $10–20K. So, if you employ 100 agents and have a 45% attrition rate, turnover will cost $1.6M to $4.8M every year. Agent retention is crucial.

What factors are impacting agent/employee frustration and turnover? (Select all that apply.)
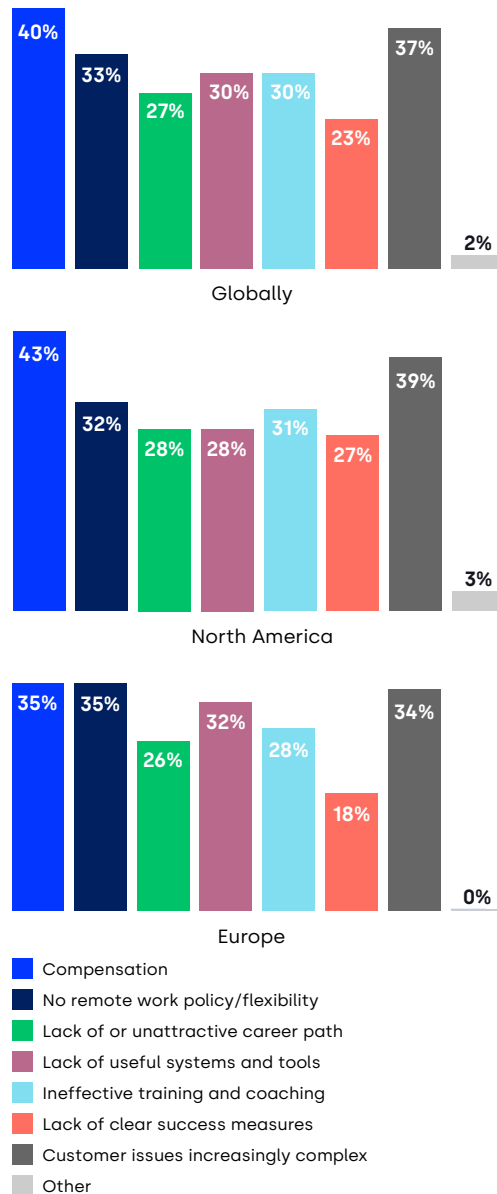

Globally:
- Compensation: 40%
- No remote work policy/flexibility: 33%
- Lack of or unattractive career path: 27%
- Lack of useful systems and tools: 30%
- Ineffective training and coaching: 30%
- Lack of clear success measures: 23%
- Customer issues increasingly complex: 37%
- Other: 2%

North America:
- Compensation: 43%
- No remote work policy/flexibility: 32%
- Lack of or unattractive career path: 28%
- Lack of useful systems and tools: 28%
- Ineffective training and coaching: 31%
- Lack of clear success measures: 27%
- Customer issues increasingly complex: 39%
- Other: 3%

Europe:
- Compensation: 35%
- No remote work policy/flexibility: 35%
- Lack of or unattractive career path: 26%
- Lack of useful systems and tools: 32%
- Ineffective training and coaching: 28%
- Lack of clear success measures: 18%
- Customer issues increasingly complex: 34%
- Other: 0%

Legend:
- Compensation
- No remote work policy/flexibility
- Lack of or unattractive career path
- Lack of useful systems and tools
- Ineffective training and coaching
- Lack of clear success measures
- Customer issues increasingly complex
- Other

Figure 3: These are the top factors impacting agent frustration.

- **Long Ramp-Up Periods:** The average ramp time for agents is three months, with some citing up to eight months to achieve the same proficiency as a tenured agent. Given an agent's short tenure and long ramp time, contact centers are spending three months or more ramping up agents to have them work for nine months or less, then starting over to fill that position. This prevents contact centers from establishing truly knowledgeable agents, affecting your customer experience and CSAT scores.

- **Time-Consuming Manual Work:** Agents often field repetitive, simple calls and must complete manual call summaries to record the conversation so it can be passed to the next agent should the customer call again. This time-consuming manual work can account for up to 40% of an agent's work,[7] which means nearly half of an agent's time is spent on boring, tedious after-call work like call summarization. Agent record keeping is also prone to error or omission.

- **Increasing Complexity:** With the increasing intelligence of IVA chatbots, customers tend to require live assistance when their requests are more complex, frustrating, or sensitive. This means it requires more knowledge, expertise, relational savvy, and time to satisfy the customer. Experienced agents can often feel unprepared and frustrated when they're ill-equipped to handle more complex issues, and new agents can quickly become overwhelmed and burnt out. Complexity is the second-leading cause of attrition, with 39% of North American agents citing "customer issues increasingly complex" as their reason for leaving their jobs and 37% globally.[8]

- **Inadequate Tools:** According to a CCW report, many agents believe customer data is insufficient or completely absent (59% of companies say they don't have enough real-time data), and they would have no easy way of finding it anyway.[9] Finding this data is also challenging for many, with 49% of agents struggling to access customer journey information and 30% feeling their options are limited.[6] Additionally, 68% express frustration due to excessive manual processes and insufficient use of AI and automation, resulting in excessive time spent on low-value tasks.[6]

These issues are long-standing for contact centers but have been exacerbated significantly by modern customer expectations. Since hiring agents has always been challenging and is even more so today, few contact centers can solve these issues by adding more agents. Instead, they turn to AI to support agents and serve in virtual agent roles.

Closing the Gap with AI

AI has long been applied in the contact center, but its usage has become much more significant in recent years. In 2022, our research showed that only 19% of contact centers were using AI tools like machine learning and chatbots.[10] In 2022, that number hit 73%.[7] Of those not using AI, a third or more plan to do so in the next 12 months.[7]

For those using AI, 78% report using conversational AI for all customer self-service, and 90% report using it to assist agents during direct customer interaction.[7]

We're witnessing this surge in AI usage because it delivers tangible results across various key performance indicators. In fact, according to a Metrigy report, the general use of AI in CX initiatives improves revenue by 19.6%, increases customer ratings by 20.5%, and boosts agent efficiency by 12.7%.[11] Introducing AI-driven tools to contact centers can enhance both customer satisfaction and agent productivity.

Harness the Power of Generative AI and Large Language Models in Contact Centers

Recent advancements in AI, particularly generative AI and large language models (LLMs), are transforming contact centers. These new AI technologies enable more personalized, efficient, and scalable customer interactions while empowering agents to deliver exceptional service. Traditional AI development demanded extensive modeling, training, and ongoing adjustments. However, LLMs and generative AI have dramatically altered this landscape. They empower AI tools to generate outputs with remarkable proficiency, often with minimal or even no training or fine-tuning. This paradigm shift accelerates the deployment of AI solutions in contact centers, significantly reducing the time to realize their value.

Let's see how Agent Assist harnesses AI technologies and LLMs to empower agents and enhance contact center efficiency.

The use of AI in CX initiatives improves revenue by

19.6%

and boosts agent efficiency by 12.7%.[11]

Do you have plans to use AI in your contact center for conversational AI (IVA) for all customer self-service? Or to assist your agents as they interact with customers directly?
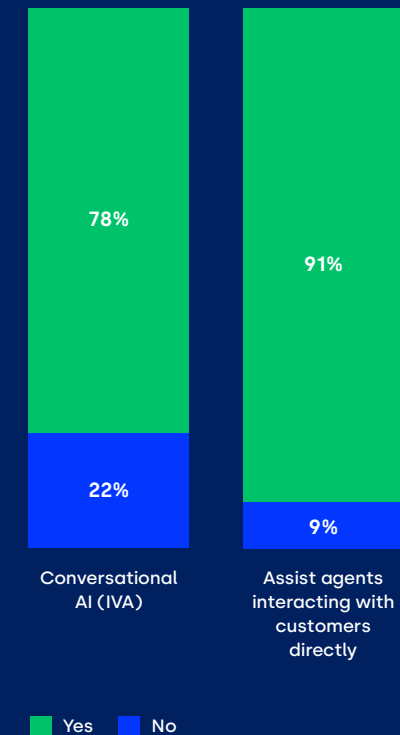

Figure 4: This shows how contact center leaders plan to use AI for tangible results.

Agent Assist Makes Work More Effective and Dramatically Improves Customer Experience

Agent Assist harnesses AI to empower contact center agents to be more informed, engaged, and focused on the customer's needs with real-time intelligence and automation. It analyzes customer intent, provides contact center agents with active guidance, and automatically transcribes, summarizes, and surfaces interaction data to managers. At its core, Agent Assist creates collaborative intelligence by combining the unique skills of people and smart machines, where both augment the other's capabilities.
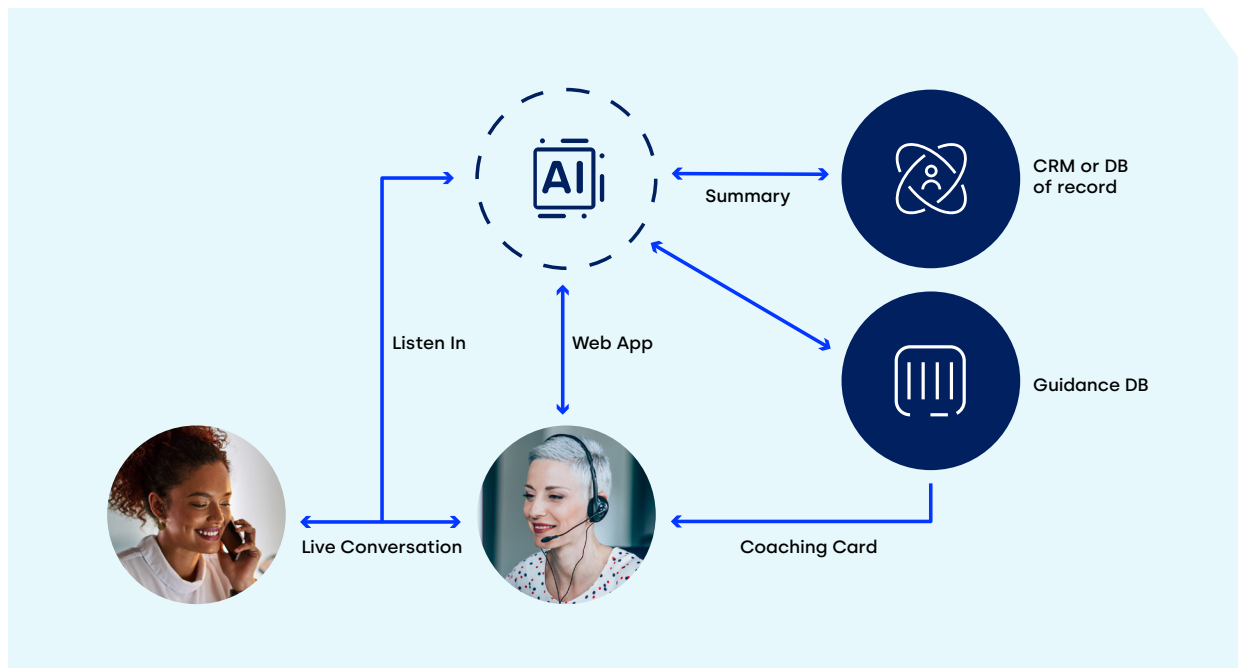

Figure 5: This shows an overview of Agent Assist in action.

Agent Assist Provides:

Real-Time Intelligence
Augments agents' abilities to be more efficient and productive

Automation
Improves agent experience by automating mundane after-contact work

Benefits of Agent Assist:

Instant Training
- Compliance
- Real-time reminders
- Objection handling

Cost Savings
- Reduce AHT by wrapping up calls faster
- Reduce after-call work with automation

Increased Upsell
Detect upsell opportunities and cue agents, increasing sales opportunities

Improved CSAT
Equip agents with information to resolve customer inquiries more quickly

Insight and Reporting
- Compliance
- Top complaints
- Upsell performance

Empower Every Role Across Your Organization

What Five9 Agent Assist Can Do for Your Agents and Leaders

Five9 Agent Assist features some of the most advanced conversational and generative AI features, providing agents the right amount of support at the right time. Empowered by relevant information and the next-best-action guidance, agents can focus on the customer to deliver a more personalized, human experience. Moreover, leaders can gain instant visibility into trends to optimize performance.

For Your Agents

At Five9, we believe agents need support, but in a way that empowers them to focus on higher-value activities and meaningful work. That means interacting and relating to the customer as a caring human. Our technology results from our core values that people, products, and partnerships create collaborative intelligence — we are a technology company, but we believe that people make the true CX difference; technology supports their impact.

Features for Agents

Real-Time Agent Guidance

Real-Time Call Transcription

AI Checklist

AI Summaries

Agent Assist Studio: Features for Business Users

Reporting and Analytics

Transcript and Call Recording Viewer

For Your Agents

Features	Description	Use Cases	Benefits
Real-Time Transcriptions	Five9 Agent Assist offers real-time call transcriptions that are accurate and upload directly to your CRM.	• Automate note-taking • Improve CSAT	Reduce manual note-taking and automatically upload call transcriptions to your CRM.
Guidance Cards	Guidance cards automatically present agents with relevant information like reminders, coaching, or knowledge base articles.	• Leverage effective objection handling • Increase upsell and cross-sell	Help agents navigate more difficult conversations, reduce their average handle time, and offer better customer experiences.
AI Checklist	Surface key tasks to agents during calls and track adherence to those tasks.	• Increase upsell and cross-sell • Improve CSAT • Accelerate new agent onboarding • Improve regulatory compliance	Assist agents with following company compliance regulations, objection handling, and upsell opportunities.
AI Summaries	Using advanced LLM technology, AI Summaries provides contact center agents and supervisors with call summaries in seconds, outlining each interaction that takes place during the call. Once the call is complete, Agent Assist automatically adds the summary to your CRM or database of choice.	• Reduce after-call work • Improve call summary consistency • Improve agent satisfaction	Increase the accuracy of your call summaries in less time to improve quality monitoring and training, compliance, and customer satisfaction.

For Your Managers and Admins

Your team is empowered to build practical AI solutions to meet your business needs with the Five9 low-code/no-code platform. Managers and leaders receive a comprehensive dashboard full of agent performance and customer satisfaction insights. This information can be used to coach agents, identify areas for improvement, and make strategic decisions to improve the performance of their contact center.
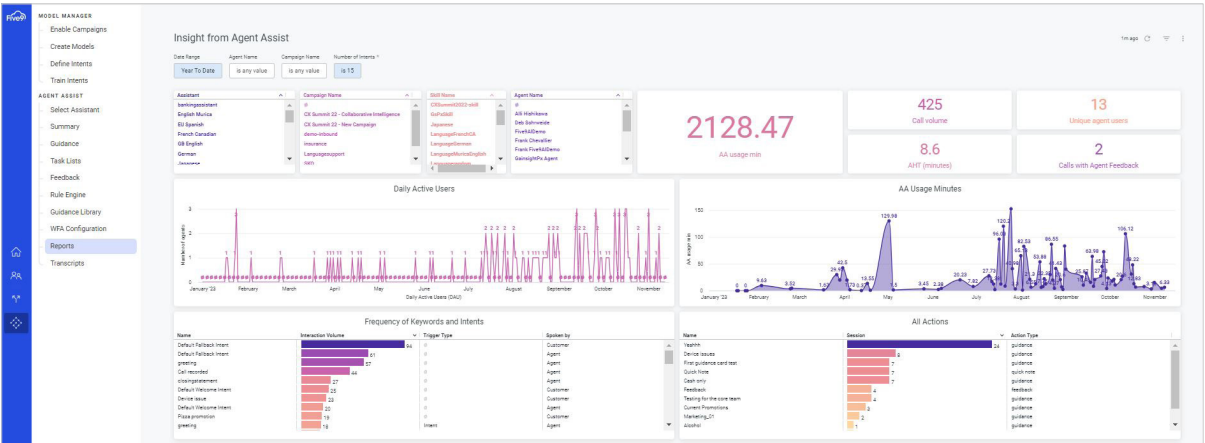

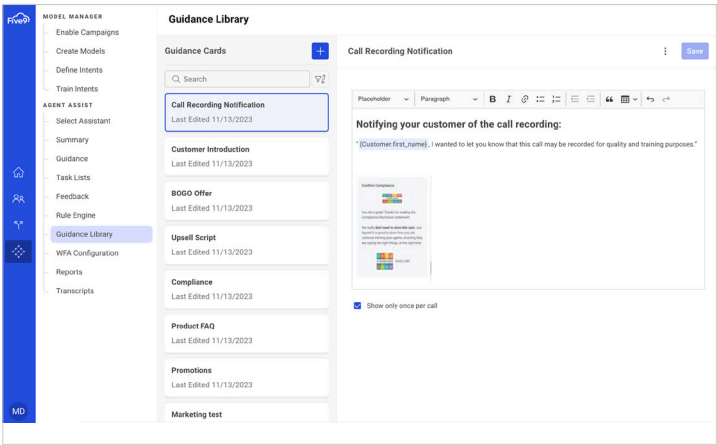**Figure 6:** An AI-powered dashboard empowers leaders to gain immediate visibility into trends.

Figure 7: Build practical AI solutions to meet your business needs with a low-code/no-code platform.

Features	Description	Use Cases	Benefits
Agent Assist Studio	Agent Assist Studio is a user-friendly, intuitive admin tool that makes it easy for admins to manage all of the product's functionality.	• Customize your agent's experience	Simplify the agent configuration process and reduce your time to market on critical updates.
Comprehensive Dashboards	Five9 Agent Assist comprehensive dashboards provide managers with immediate insights into their contact center performance and trends. Managers can identify key macro trends and KPIs in the same interactive dashboard, like average handle time, agent performance, and campaign progress.	• Identify agent coaching opportunities • Improve CSAT scores	Using a single interactive dashboard, managers immediately gain insight into key macro trends and KPIs, and drill down to specific agent and campaign performance.
AI Model Manager*	AI Model Manager is a low-code/no-code admin tool that allows non-technical users to define, train, and deploy their AI models without specialized expertise. Administrators can easily manage caller intents, train, and customize the AI behavior to operational needs.	• Customize customer and agent intents	Easily fine-tune the AI within your agent experience without the need for exhaustive talent and resources.
Transcript and Call Recording Viewer	Leaders can easily search and view call recordings, transcripts, and summaries to identify customer sentiments, intents, and topics driving call volume.	• Improve agent script adherence and compliance	Quickly identify agents adhering to best practices or going off script.

*Beta feature

Deep Dive into Top Agent Assist Use Cases

1. Reduce AHT and ACW

After-call work (ACW) is an essential part of contact center operations and refers to the tasks that agents need to complete after interacting with a customer on a call. But it can also consume significant time, impacting agent productivity and customer experience. According to a report from Call Centre Helper, 41% of the average contact center's time is spent on repetitive administrative tasks.
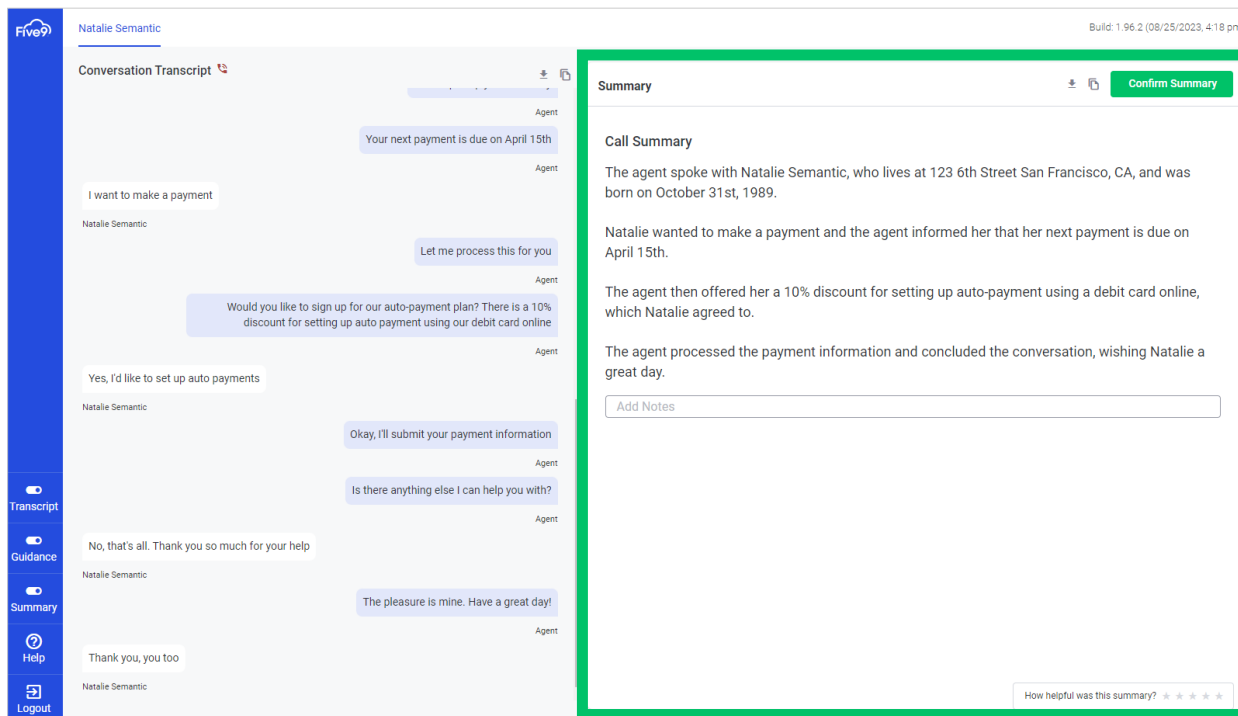

Figure 8: Generate comprehensive summaries within seconds.

According to a report from Call Centre Helper, 41% of the average contact center's time is spent on repetitive administrative tasks.[12]

Top Agent Assist Use Cases with Five9 Customers

Reduced after-call work

Real-time transcript

Improved regulatory compliance

Call summary consistency

Increased upsell and cross-sell

Accelerated new agent onboarding

Improved call quality scores

Improved script adherence

Objection handling

Next-issue avoidance

AI Summaries is an out-of-the-box feature within Five9 Agent Assist that leverages OpenAI GPT to provide call summaries within seconds.

According to Metrigy, Agent Assist is the number one technology in use to help close sales.

Every minute spent on ACW is a minute that agents aren't helping customers, reducing efficiency for the contact center. AI Summaries is an out-of-the-box feature within Five9 Agent Assist that leverages OpenAI GPT technology to provide call summaries within seconds, reducing manual after-call work and enabling agents to focus on customers.

This frees agents to focus on customer interactions, offering better support and enhancing efficiency. Agents can access valuable context from previous interactions, improving personalization. This feature saves time and ensures that the next agents have vital information, elevating the customer experience and agent satisfaction.

2. Increase Sales, Upsell, and Cross-Sell

Guidance cards and AI Checklist are great features to assist with upsell and cross-sell opportunities to help achieve the best outcome for the call. According to Metrigy, Agent Assist is the number one technology in use to help close sales.
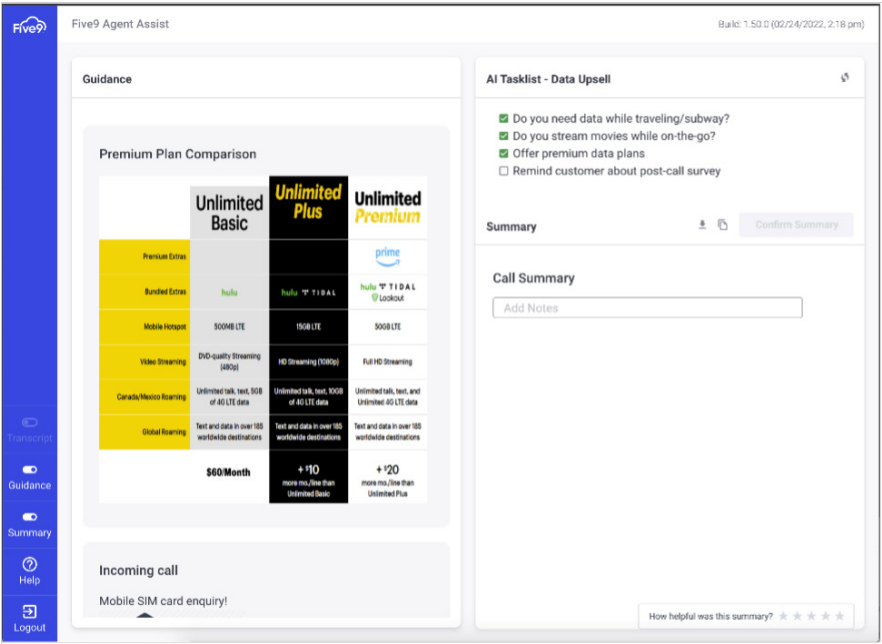

Figure 9: AI Checklist and a guidance card prompt agents with upsell info.

Use Case

Imagine a customer contacts a telecommunications company's customer service hotline to inquire about their existing internet plan. The customer has a basic plan and is looking for assistance in improving their internet service without spending significantly more.

When the customer's call is routed to an agent, Agent Assist immediately analyzes the customer's account history, including their current plan, payment history, and any previous interactions, and provides:

• **Personalized Recommendations:** Agent Assist identifies that the customer frequently streams HD content and is often close to exceeding their current plan's data cap. It also recognizes that the customer's payment history is excellent.

• **Real-Time Guidance:** Based on this data, Agent Assist provides real-time guidance to the agent, suggesting an upsell opportunity. It advises the agent to recommend a higher-tier plan with unlimited data, emphasizing that it's slightly more expensive than the current one.

• **Product Knowledge:** It also offers links to detailed information about the suggested plan, enabling the agent to provide comprehensive and accurate details to the customer.

In this scenario, Agent Assist enhances the agent's ability to identify and capitalize on upsell and cross-sell opportunities. It also guides them to important product information that will add more value to your customer experience. The result is a win-win situation for both the customer and the company.

3. Improve Agent Experience

Agent Assist helps your contact center support agents at crucial phases of the agent lifecycle, from onboarding and ramp support for new hires to checklists and prompts for more experienced agents.

Agents require different types of support at different stages of their tenure. Contact centers can strategically use Agent Assist to provide this curated support to decrease attrition by equipping agents with support and coaching that makes work easier, more automated, and more guided. Agents who feel successful and positive about their competence and capacity to satisfy customers tend to stay longer — given that other parameters of job satisfaction (like compensation and flexible scheduling) are met.

Agents who feel successful and positive about their competence and capacity to satisfy customers tend to stay longer.

> **"Since deploying Five9 Agent Assist, we have significantly improved employee experience by ramping up new team member onboarding and shortening the training period. New team members feel more empowered and confident knowing they have the real-time assistance to guide them if they need it."**
>
> WOW! Smiles

Accelerate Onboarding

Agent Assist greatly reduces the time it takes for new hires to onboard and reach the same level of proficiency as experienced agents. Surfacing knowledge articles, product information, guidance cards, and automatic checklists in real time helps agents better serve customers on Day 1. With repetition and coaching opportunities, new hires get up to speed quickly and efficiently.

Reskill Experienced Agents

In many organizations, deals and promotions are updated every quarter. Ensuring agents remain informed is crucial, especially with the challenge of training even experienced agents on these frequent changes. Agent Assist plays a pivotal role by promptly alerting agents to the latest promotions as they occur. It provides quick access to reference guides on new deals, enabling tenured agents to stay current and self-assured when engaging with customers. Without such assistance, the training process becomes more time-consuming. It's imperative to leverage technology like Agent Assist for seamless and efficient updates, ultimately benefiting agents and the organization.

Prepare Seasoned Agents for Managerial Roles

For seasoned agents, transitioning into managerial roles is streamlined with Agent Assist. It delivers continuous skill development, enabling agents to receive real-time feedback and automating repetitive tasks. By relieving them of manual work, it empowers agents to concentrate on high-value tasks, fostering their career progression and development.

Seasoned Agents

Experienced Agents

New Hires
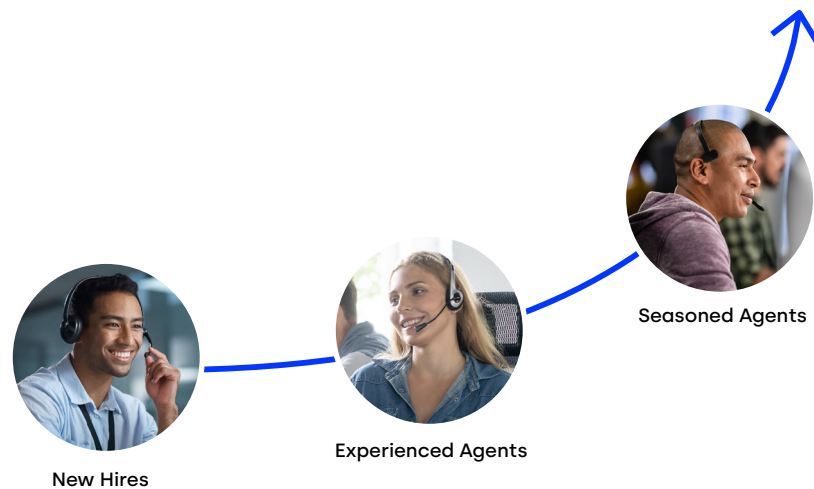
4. Increase Compliance

Agent Assist helps improve the ability to ensure standards like HIPAA or other compliance requirements with features like AI Checklist that track conversations and remind agents of compliance validation requirements and regulatory issues.
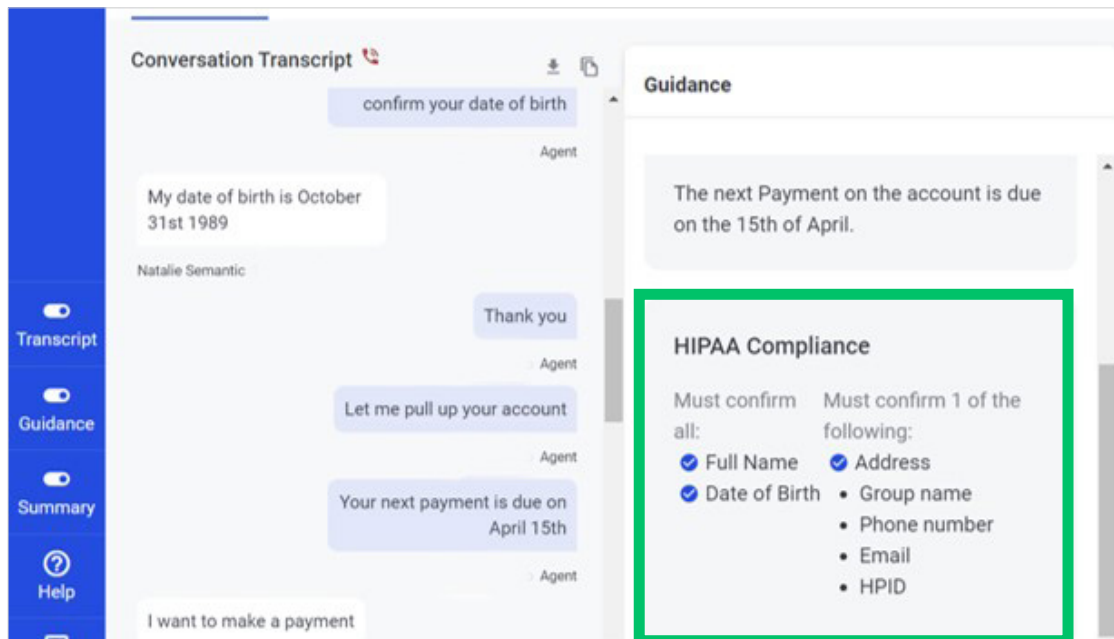

Figure 10: A checklist provides HIPAA-compliant steps.

A telemedicine company, Teladoc struggled with drastic call spikes in 2020 due to the start of the COVID-19 pandemic. Agent Assist allowed agents to view call transcripts in real time, helped them validate HIPAA compliance, and enabled them to provide a better experience using AI-powered call guidance in real time. Agents increased quality scores with real-time guidance and also improved new agent onboarding and the training process.

Read the case study →

5. Leverage Effective Objection Handling

Empowered by Agent Assist, the agent confidently responds with a well-prepared response to the customer's objection.

Let's take a look at a scenario here:

A customer contacts a sales team to inquire about a new software product. During the conversation, the customer raises objections about the product's price and asks for more competitive pricing options. The sales team has integrated Agent Assist into their CRM system, which provides real-time assistance to agents during customer interactions.

Real-Time Objection Detection

Agent Assist monitors the conversation for specific keywords and phrases related to objections, such as "price," "cost," or "affordability." It can identify objection signals as they occur.

Instant Response Recommendations

When an objection is detected, Agent Assist offers the agent suggested responses and objection-handling strategies. These suggestions are based on best practices and successful objection-handling techniques.

Product Knowledge Assistance

The tool provides links to relevant product information, including pricing tiers, discounts, and value propositions, so agents can address objections with accurate and persuasive details.

Results

Real-time objection detection, response recommendations, and easy access to relevant product information result in more effective and persuasive customer interaction, ultimately leading to a successful sale.

Real-time objection detection, response recommendations, and easy access to relevant product information result in more effective and persuasive customer interaction, ultimately leading to a successful sale.

6. Facilitate Next-Issue Avoidance

Picture a scenario where a customer contacts a financial institution's customer service hotline to inquire about their account balance.

Agent Assist analyzes the conversation and detects that the customer is inquiring about their account balance. It prompts the agent to provide this information right away, ensuring a quick and efficient resolution to the initial inquiry. While addressing the account balance query, Agent Assist also suggests that the agent proactively offer the customer additional services, such as enrolling in telephone banking. This is presented as a solution to help the customer check their balance via self-service, reducing the contact rate.

In this use case, Agent Assist plays a crucial role in enhancing customer service by facilitating next-issue avoidance. It provides agents with real-time guidance, helping them promptly address customer queries and offering proactive solutions to prevent future issues. This improves customer satisfaction and strengthens the overall customer relationship and loyalty.

OceanFirst Bank implemented next-issue avoidance with Five9 Agent Assist. To learn how it helped, read the case study.

While addressing the account balance query, Agent Assist also suggests that the agent proactively offer the customer additional services, such as enrolling in telephone banking.

CASE STUDY

OceanFirst Bank implemented next-issue avoidance with Five9 Agent Assist. To learn how it helped, read the case study.

Read the case study →

TruConnect, an American mobile virtual network operator, partnered with Five9 Agent Assist to implement practical AI across its three contact centers. With **Five9 Agent Assist, TruConnect has seen a 30-second reduction in overall handle time due to the automation of note-taking and summaries.** This not only yields a massive savings financially, but it also allows agents to take on more customer calls per day.

Read the case study →

20%

Just 1 minute less on an average 5-minute call results in $150 in savings per agent

The ROI Is Tangible: Reduce AHT and ACW

Agents are the most valuable and expensive contact center asset, so it's crucial to make their time as valuable and efficient as possible. Agent Assist helps you achieve immediate cost savings by minimizing the time it takes for them to onboard, sift through dozens of applications and knowledge articles during an interaction, and perform after-call work. Agent Assist helps contact centers realize immediate cost savings based on time saved by agents on each call. The amount of time previously spent during and after calls can drop significantly. This time savings directly impacts the bottom line.

You can estimate the tangible ROI your organization can realize with Five9 Agent Assist using our ROI calculator: Calculate your Agent Assist ROI.

ACW and Talk Time by Industry (Five9 Customers)

Assumption:

600 calls per agent per mo. × 1 min. saving per call x 60 min. per hr. = 10 hrs. saved

10 hrs. saved × $15 per hr. = $150 per agent per mo.

- ACW
- Talk Time

Industries (top to bottom): Non-Profit, Software & Internet, Computers & Electronics, Government, Manufacturing, Telecommunications, Media & Entertainment, Healthcare, Pharmaceuticals, & Biotech, Financial Services, Travel, Recreation, & Leisure, Education, Retail, Outsourcer, Business Services, Consumer Services, Wholesale & Distribution, Transportation & Storage, Agriculture & Mining, Energy & Utilities, Real Estate & Construction
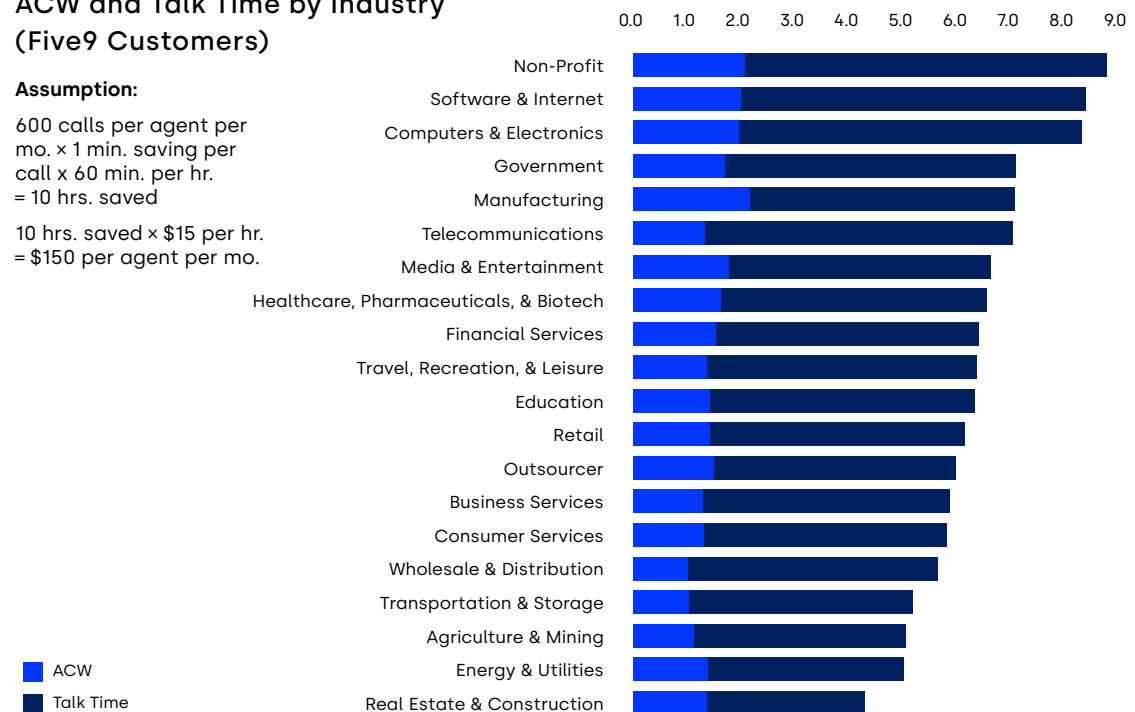
Figure 11: Realize unparalleled value and ROI with Agent Assist.

Get Started with Five9 Agent Assist

Five9 Agent Assist offers unparalleled support for agents, using the latest AI technology. Experience seamless context transfer across the core Five9 platform and comprehensive contact center operations, encompassing campaigns and skills management. Leverage AI-driven subject-matter expertise for efficient implementation and configuration of AI models. Enjoy the convenience of Agent Assist being accessible as a dedicated panel within Agent Desktop Plus, seamlessly merging with your preferred CRM environment for a unified and efficient workflow.

Dramatically improve CX, team performance, and business outcomes.

Learn more about Five9 Agent Assist.

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About Five9

The Five9 Intelligent CX Platform provides a comprehensive suite of solutions to engage with customers across their channel of choice, empower managers with insights and intelligence into contact center performance, and elevate your business to deliver better business outcomes and Bring Joy to CX™. Our cloud-native, scalable, and secure platform includes contact center; omnichannel engagement; Workforce Engagement Management; extensibility through more than 1,400 partners; and innovative, practical AI, automation, and journey analytics that are embedded as part of the platform. Five9 brings the power of people, technology, and partners to more than 2,500 organizations worldwide.

For more information, visit **www.five9.com**.