

Performance Dashboard

Demo Flow

DISCLAIMER:

This is by no means a “perfect” demo. This is a general pattern that we have seen work well. Feel free to customize your demos based on your knowledge and abilities, as well as the customer needs and interests.

Talk like call center operators. Here, we've outlined some very real pain points that many call centers experience. Talk about those; they will resonate with the customer. Then show how the product is combatting those pain points.



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History of the Product

Feel free to share it!

Five9 Performance Dashboard is a performance management tool that was **developed within the walls of a call center**. A globally established BPO (called Focus Services, located in northern Utah. 13 global locations, 3500+ agents) saw a need for more efficient data aggregation, real-time visibility, and employee engagement in their centers.

At the time there wasn't anything on the market that would satisfy their need — so they built it. A few smart software engineers put their heads together and created what we now know as Five9 Performance Dashboard. The reason we tell this story is so that you (the prospective customer) know this was **built by call centers**, for call centers.

2

Ask Questions

- What are your current processes for reporting?
- How many systems do you use and generate reports from?
- How often are reports generated?
- How often are your employees provided with feedback?
- How do you empower your agents to improve?
- Do you currently run an incentive plan for agents?
- How do you develop agents' skills on a certain aspect of their work?
- How do you move the needle?
- This question is what performance management is all about. What steps are you taking to perform better each day?

3

Demo Prep

We **HIGHLY** recommend opening your demo site before the demo starts to make sure your dashboards are populating relevant data.

Our demo site runs with pseudo data on a 90-day loop. That means that **it acts as though it is an actual call center** (calls go into the queue, agents change states, etc.). For example, if you are performing a demo at 8 a.m. on Monday morning and your modules are set to report data from “This Week”, you likely won’t see much to report on. Simply change your time range to “Last 7 Days” or anything else that will take more than 1 day into account.

We also **HIGHLY** recommend personalizing your dashboards for your prospects.

Include metrics they care about, different dashboards they would like built out, and even wallboards with their logo in the background (Reach out to Jaden Mecham for additional tips and tricks **to knock their socks off**).

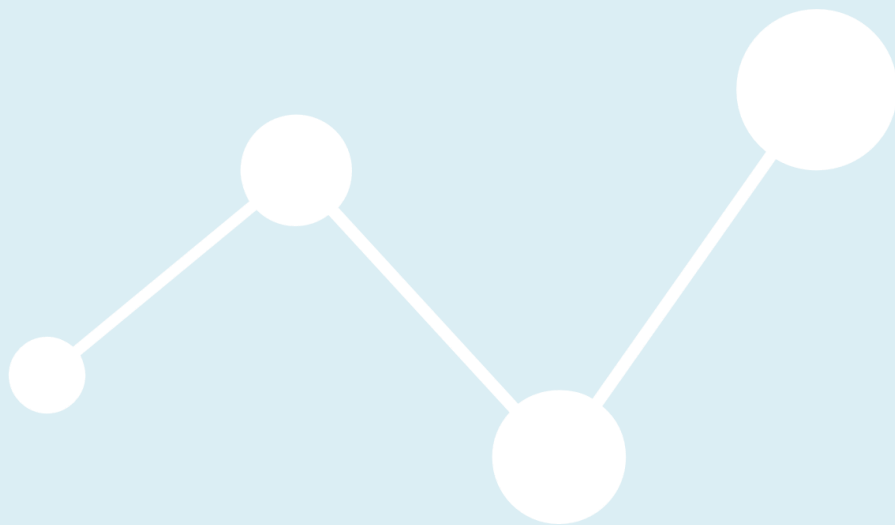
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Top 5 Roadblocks

Use Clearview’s “Top 5 Roadblocks” slides.

For us, these are the 5 major roadblocks that companies will face in rolling out a successful performance management strategy. Talk about them with your prospect and find out which one is the largest pain point for them currently.

Demo Flow



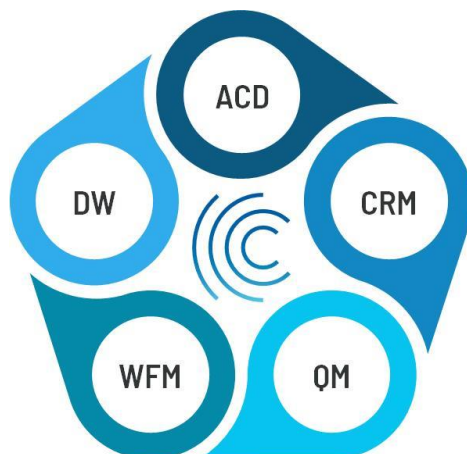
Performance Dashboards

The first reason this tool was built was to solve the tasks of reporting and data aggregation.

Roadblock #1 – Disparate Data

- (Pull up dashboard, refer to performance summary module. Highlight disparate data sets in same module)
- Each system you use to run a contact center provides a pulse to show the health of that aspect of your business. As you can see in this module, Five9 Performance Dashboard gives us the ability to look at the statistics across multiple data sources all in the same place. Each of the systems you're currently using are great at what they do; they provide a great pulse. The problem is that each one gives you a different reading. Gauge your contact center's holistic pulse through Five9 Performance Dashboard.
- (Click on settings button on module and then "Metrics")
- With Five9 Performance Dashboard, through robust API's and automated reports, we automatically aggregate all your data to give you a holistic view of your center. (Talk through the different metrics we see in the metric selector. I usually highlight the ACD data, Salesforce Data, and other data the prospect is currently tracking.)
- With Five9 Performance Dashboard, we can filter the data however you would like (by team, campaign, skill, individual agent, or the entire company (talk through the functionality of filters).

Solution: Aggregated Data



Performance Dashboards

The next reason Five9 Performance Dashboard is so useful is because of the real-time nature of the product:

Roadblock #2 – Delayed Access

- Effective call center management relies on making real-time adjustments. People talk a lot about historical reports and real-time dashboards. We see those as one in the same.
- Because of the need to manually aggregate data, many contact center operators still manage performance based on historical, delayed reports. If you're getting reports on today's performance tomorrow morning, you've lost precious time, agent morale, and revenue.
- (Show 'Current Agent States' module or a gauge showing calls in queue)
- The data inside Five9 Performance Dashboard will refresh on a few different time frames:
 - Anything dealing with agent states or calls in queue will be updating about every 5-10 seconds.
 - Anything you would consider "Historical" (# of calls, AHT, Quality Scores, etc) will update about every 15 minutes.

Solution: Real-time Data



Performance Dashboards

Five9 Performance Dashboard is built for every role in the contact center:

Roadblock #3 – Limited Visibility

- (Display agent dashboard) Micromanaging is tedious for the manager and not desired by the agent. (Highlight key features of agent dashboard: Gauges, performance summary, rankings, KPI's)
- Using role-based permissions, everyone can see a dashboard that only shows data relevant to them (whether that be an agent, team lead, executive or client)
- Five9 Performance Dashboard allows agents to be autonomous and drive their own performance, in real-time. They no longer need to wait for their weekly reports or monthly performance appraisals to realize they need to improve performance. They track where they are, easily know where you as the managers want them to be and can make real-time adjustments.

Solution: Enterprise-Wide Visibility

Roadblock #4 – Reactive Management

- (Talk about the colored performance objectives)
- Other tools to help communication with agents include Announcements and Work Aide modules

Solution: Behavioral Intelligence



Wallboards

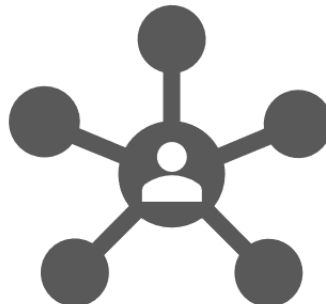
For us, wallboards serve two specific purposes: **to communicate and to motivate.**

- (Pull up Wallboard Management Page. Go to your Wallboard and click to add a new slide. Briefly describe the different slide types)
- Wallboards will run on whatever time interval you specify before moving to the next slide.
- These wallboards use the same mechanics as our dashboards but are much better fit for TV screens (same metric options and refresh rates)
- **Customize** backgrounds and transitions to personalize them for your company.
- Links can be made for private or public use. Great for clients who don't want to manage an entire dashboard but still want to be informed.

*** To wrap up the 'Reporting' portion, I go over other basic features and functionality of the dashboards:

- Dashboard Sharing options
- Subscriptions to individual modules or entire dashboards

Communicate and Motivate



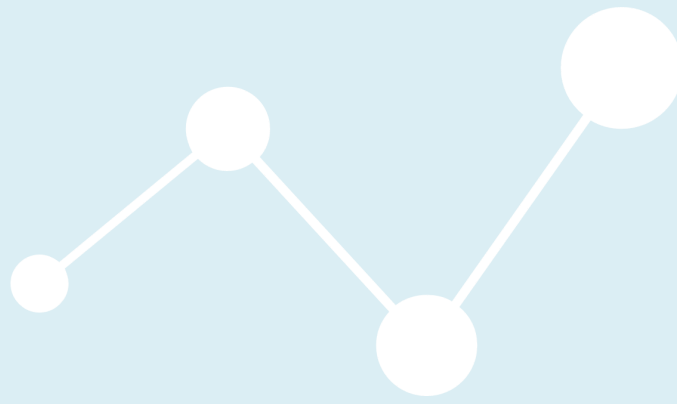


Roadblock #5 – Detached Employees

Improving or changing performance is all about improving and changing behavior of employees. This requires motivation and a knowledge of the metrics agents have control over.

- One way to positively influence agent behavior is through gaming and competition (Go to Agent Dashboard) Two main problems with most gamification or incentive programs are that:
 - They are not sustainable because they involve elaborate manual processes.
 - The top 10% of agents are the only ones rewarded or recognized for performance.
 - (Open Command Center and talk through basic set up of a game)
 - (Explain the different game types and how the 'Metrics' and 'Qualifiers' work together)
 - Gamification in a contact center can be difficult because there are so many metrics that need to stay in balance for it to be effective. This requires even more manual aggregation beyond just reporting which can be difficult to sustain long term. When setting up a game inside Five9 Performance Dashboard, users have the ability to use not only scoring metrics ('Metrics') but also qualifying metrics ('Qualifiers') to create all-encompassing games that incentivize correct behaviors with automatic scoring.
 - (Go back to an agent dashboard and show the 'Games' and 'Challenges' module)
 - Once you've decided how to motivate your agents, visualizing the games is a vital next step. Using the games module, agents can look at their performance in the games and see how close they are to receiving the reward.
- Challenges are a great way to put power in the agents' hands to control an aspect of gamification. In the Command Center, admins can decide which metrics are available for agents to challenge their peers on. Agents can then initiate challenges with peers and wager coins.
- (Open agent profile and speak to functionality of coins, badges, avatars)
 - (Open Marketplace and speak to functionality)

Solution: Prescriptive Analytics



Reach out to Jacob Bentley at jacob.bentley@clearviewlive.com if you have any questions or concerns.

Good Luck!

Remember: Feel free to customize your demos based on your knowledge and abilities, as well as the customer needs and interests