

# The Five9 CX Maturity Model

At Five9, we are here to help you in your efforts to reimagine CX and realize results by sharing best practices and helping you chart a path to digital customer experience maturity.



The Intelligent Cloud Contact Center

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# Hello & Welcome!

Prioritizing Customer Experience (CX) has never been more important. But don't just take our word for it, other industry leaders agree!

**"89% of businesses today compete primarily on customer experience – up from just 36% in 2010."**

**Forbes**

**"75% of consumers tried to or did switch a brand if they had a slow or poor customer experience during the COVID-19 pandemic."**

McKinsey  
& Company

**"Every year in the U.S. upwards of \$1.6T is lost due to bad customer service."**

qualtrics.<sup>XM</sup>

**"A totally satisfied customer contributes 2.6 times as much revenue as a somewhat satisfied customer."**

★ Trustpilot

CX is a crucial ingredient to delighting your customers, differentiating your brand, and deepening your customer relationships. And there's nowhere that this comes more into focus than in your contact center. You may find yourself, like many businesses, investing in digital CX transformation but getting stuck translating your intentions into actions:

**Gartner predicts that by 2022, Contact Center as a Service (CCaaS) will be the preferred adoption model in more than 50% of contact centers, up from 10% in 2019.**

**However, Gartner also acknowledges a gap exists between choosing and doing, with many contact center leaders struggling to understand where to begin, what their goals should be, or how to undertake a digital transformation.<sup>1</sup>**

<sup>1</sup> The Future of the Contact Center - Gartner Research, Apr 2019

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Chances are you are somewhere along that transformation journey, or perhaps you are at a different point of the "maturity curve" depending on whether you look through the lens of people, process or technology. That's probably why you are here today reading about the different stages of CX Maturity.

### **Most customers we speak to tell us that:**

1. They want to transform or rethink CX but don't know where to start
2. They are looking for incremental improvements from their current CX efforts
3. They want to understand CX best practices
4. They may have uncertainty about the move to the cloud
5. They are spending too much time maintaining poorly performing legacy systems and need help with where to get started

These questions are precisely why Five9 created the CX Maturity Model. Regardless of how sophisticated your digital CX efforts are today, it's essential to understand the different drivers of CX maturity. These drivers improve the overall customer experience, empower agents, and add value to your business. This process may feel overwhelming. Not to worry, we've got you covered.

Drawing from our experience working with customers big and small across industries, we've developed the CX Maturity Model to guide you on your digital CX transformation journey.

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# What is a CX Maturity Model?

The Five9 CX Maturity Model helps you identify where your CX efforts stand today and where to focus your efforts on your digital transformation journey.

Use the CX Maturity Model to assess your current development level, determine where improvement is needed, and help map out future goals to transform your CX from a cost center to a value driver that delights customers.



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# Levels of Maturity

The Five9 CX Maturity Model identifies three stages of CX development:

1. **Emerging** companies who are in the early stages of digital CX transformation
2. **Evolving** companies who are in the intermediate stages of CX maturity
3. **Leading** companies have undertaken full-scale digital CX transformation

In each maturity stage, the model explores the current state of customer experience using four main criteria:

1. **Workforce:** Looks at how your organization is leveraging technology to increase the productivity of your live contact center agents and how you empower agents to deliver results anywhere
2. **Self-Service Customer Engagement:** Considers the use of AI and automation to streamline customer engagement and enable looks at how teams are starting to continually optimize
3. **Contact Center Intelligence:** Assesses the extent that a contact center can leverage automation and data to improve reporting and gain customer insights
4. **Contact Center Administration & Infrastructure:** Evaluates how your organization is using technology to make management and administration of contact center software, hardware and equipment easier and more transparent

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# How To Use This Model

The Five9 CX Maturity Model combines best practices in customer experience and contact center management with strategies used throughout our customer base. After reviewing this model you should understand what separates an emerging CX strategy from that of a leading strategy. It provides an in-depth understanding of how to move your CX strategy and processes from Emerging to Evolving to Leading by embracing incremental levels of sophistication, provided through a step-by-step guide.



# Five9 CX Maturity Model

	Emerging	Evolving	Leading
Workforce	<ul style="list-style-type: none"> <li>Limited remote work</li> <li>Limited in-the-moment training</li> <li>No AI tools to assist agents</li> <li>No digital workforce</li> <li>Using multiple disparate systems</li> </ul>	<ul style="list-style-type: none"> <li>Agents using cloud enabled voice</li> <li>Agents can view the customer journey</li> <li>Native CRM integrations</li> <li>Supervisors provide real-time coaching</li> <li>Load balance live and digital labor</li> </ul>	<ul style="list-style-type: none"> <li>Workforce blends live and digital agents</li> <li>AI helps guide agent conversations</li> <li>Training is scheduled, automated and programmatic</li> <li>Advanced quality measurement and management tools</li> </ul>
Self-service customer engagement	<ul style="list-style-type: none"> <li>Basic IVR: website or voice</li> <li>Touch-tone call routing</li> <li>Making IVR updates is hard</li> <li>Limited CRM integration</li> <li>IVR tie into resources limited</li> </ul>	<ul style="list-style-type: none"> <li>Multiple avenues for self-service</li> <li>Customers use natural voice</li> <li>Sophisticated knowledge paths for agents</li> <li>Deep knowledge bases</li> </ul>	<ul style="list-style-type: none"> <li>Customers experience real-time resolution</li> <li>The majority of cases are addressed digitally</li> <li>Contact center can notify or callback customers proactively</li> </ul>
Contact center intelligence	<ul style="list-style-type: none"> <li>Reporting is basic and siloed</li> <li>Limited analytics and insights</li> <li>Persona based reporting only</li> <li>Reporting is not integrated across channels</li> </ul>	<ul style="list-style-type: none"> <li>Reporting has limited synchronization</li> <li>Data is kept in the contact center</li> <li>Analytics used to identify trends</li> <li>Speech is also analyzed to identify sentiment and emotion</li> </ul>	<ul style="list-style-type: none"> <li>360 degree advanced reporting</li> <li>Real-time analytics, insights and automated actions</li> <li>Reporting integrates with BI tools</li> <li>AI aids to accelerate analysis and actions</li> </ul>
Contact center administration & infrastructure	<ul style="list-style-type: none"> <li>Change management: weeks</li> <li>Infrastructure managed in-house</li> <li>Optimization occurs in-house by IT</li> <li>Contact center projects backlogged</li> </ul>	<ul style="list-style-type: none"> <li>Teams are decisive with leadership support</li> <li>Infrastructure managed in the cloud</li> <li>Administration happens on-site or through a partner</li> <li>Contact center projects viewed as strategic</li> </ul>	<ul style="list-style-type: none"> <li>Change management is ongoing</li> <li>Self-customization, workflow and automation are commonplace</li> <li>AI is highly prevalent across the contact center</li> </ul>



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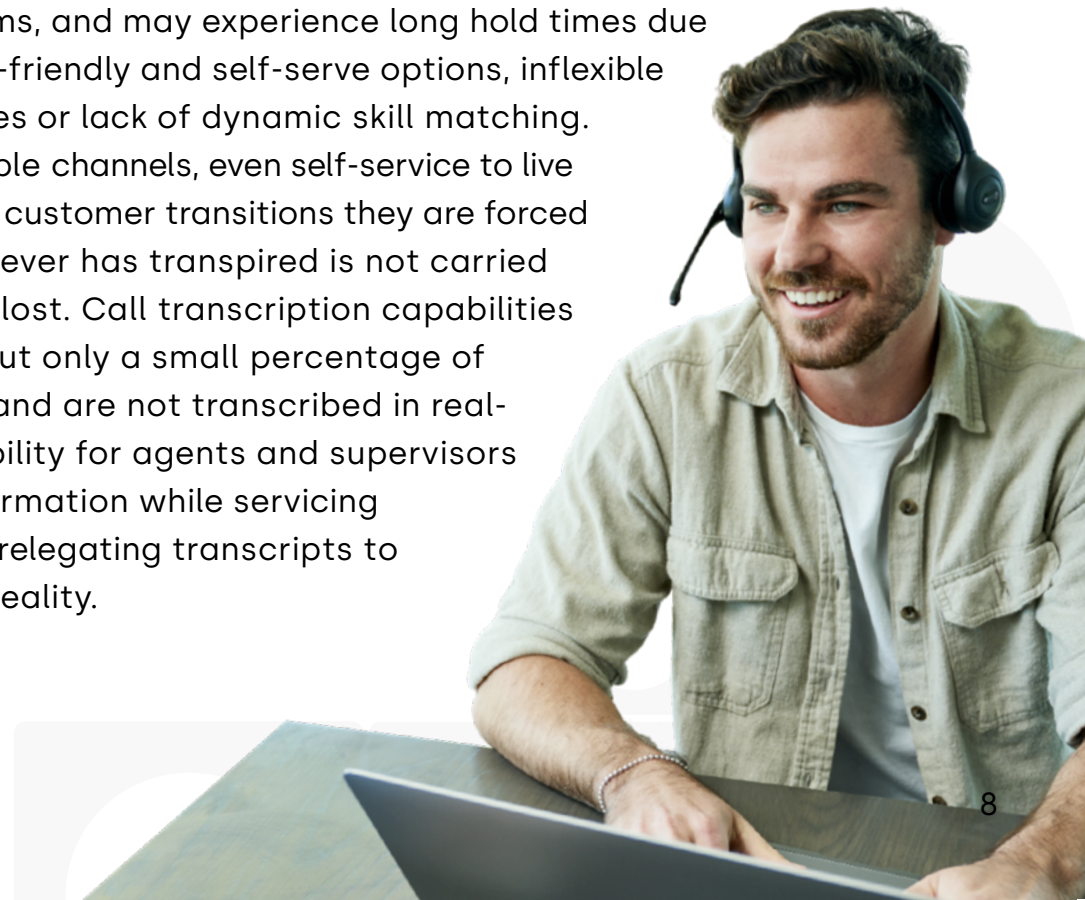
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# Stage 1: Emerging

Is your company in the early phases of digitally transforming your contact center? Then you're considered an Emerging digital CX organization.

You are likely utilizing on-premise technology with voice calls as the primary channel for customer engagement. You have service agents but limited or no CRM integration. Agents spend a great deal of time and effort toggling between systems to access and rekey account information.

Customers may spend more time with the agent due to a lack of integrated systems, and may experience long hold times due to lack of customer-friendly and self-serve options, inflexible scheduling processes or lack of dynamic skill matching. There may be multiple channels, even self-service to live agent, but when the customer transitions they are forced to start over – whatever has transpired is not carried over, the context is lost. Call transcription capabilities may be available, but only a small percentage of calls are captured and are not transcribed in real-time, limiting the ability for agents and supervisors to leverage the information while servicing customers, instead relegating transcripts to an "after the fact" reality.





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## Workforce

An Emerging contact center's live agents struggle to work remotely, and have limited in-the-moment coaching, performance management tools, scheduling, or access to subject matter experts. Agent experience is challenging with blind spots in reporting, and agents needing to toggle between multiple applications, browsers and tabs across screens to access information. They have limited or no AI tools to assist with call transcriptions or digital workforce (Intelligent Virtual Agents). These live agents must operate across disparate systems to capture customer information, look up customer records manually and have limited access knowledge bases or other resources outside the contact center.

While an emerging contact center may have some quality management capabilities, they are likely manual in nature and not consistently applied across team members. Supervisors likely have limited or no workforce or quality management tools beyond voice channels, and gamification to support agent engagement and well-being is not currently deployed.

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## Self-Service

For phone-based self-service, Emerging companies typically still rely on basic Interactive Voice Response (IVR) which forces callers into a set of complicated and frustrating touch tone menus. Customers may be routed to a person or department through a touch-tone auto attendant ("press 1 for sales, press 2 for service") but the ability to deliver user friendly self-service is limited

Organizations may also struggle to make simple updates to prompts or menu options, having to rely on I.T. or outsourced services groups to make changes. Customers may also be directed to the company website for self-service options or to simple web chatbots, but self-service channels operate in separate "silos" where applications don't retain history or context of earlier interactions and force users to start over when engaging through a new channel.



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## Contact Center Intelligence

Contact center intelligence in an Emerging organization consists of basic reporting capabilities. Reporting is siloed and provides only a “point in time” snapshot, delivering few or narrow insights and analytics, actions from these insights is also limited or not apparent. Customer context is not always kept throughout the journey as the customers move across web and agent interactions.



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## Contact Center Administration

Change is slow when it comes to administration at the Emerging stage of digital CX transformation. Change management initiatives are measured in months and even years. Infrastructure is managed and optimized manually by in-house IT teams or by a third-party vendor. Contact center-specific projects are often backlogged and not prioritized by leadership. If the organization is still using an on-premise or hosted contact center solution they are forced to pay up-front for software, hardware and equipment. They must then install, manage, upgrade and maintain their own infrastructure while deploying and supporting agent desktop applications.





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# Stage 2: Evolving

A company at the Evolving stage of the CX Maturity Model has most likely shifted its contact center to the cloud. They have started to deploy integration as a strategy across their ecosystem (most commonly starting with CRM and UC integrations) and are starting to create a CX "Toolchain".

The Evolving company has expanded beyond voice channels to include some other digital channels (email, chat, SMS/messaging) but may not be using all of these in a fully integrated way resulting in an inconsistent customer experience. Supervisors and managers have some quality, workforce, and performance management tools, (but they are most likely still deployed stand alone and programs are not coordinated across teams).

Lastly, a company at the Evolving stage understands workflow and process, is looking at ways to make AI practical and impactful, and has business/contact center metrics available through standard and custom reports and analytics.





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## Workforce

Evolving companies' live agents are able to work remotely using a cloud-enabled technology to manage and support the customer. Agents have the capability to view the customer's journey across channels and seamlessly update CRM customer records before, during, and after the call. Agents also spend their time across voice and digital channels to give customers choice. Similarly, when it comes to work schedules, agents are able to express preferences about when they work and have easy access to their schedules. This allows organizations to dynamically load balance across digital and live channels.

Supervisors in the evolving stage are more than likely able to leverage call and screen recording to monitor quality and have the ability to interject coaching and assistance during a customer engagement.

Companies may have also introduced some level of automated scoring to continuously monitor performance and help provide the right learning paths for agents. Automated scoring can also allow access to insights into where technology and people are best utilized to enable a more compelling customer experience.





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## Self-Service

Evolving companies typically offer multiple self-service channels. For phone-based self-service, organizations may have added speech recognition and text-to-speech to support simple directed dialog self-service applications ("please press or say 1", "please say sales, service or support") however the options remain limited, and customers are not able to speak naturally. Applications may also be limited to simple FAQ or call steering and tend not to offer more sophisticated database integration and backend fulfillment.

Evolving companies may be attempting to increase automation rates by deploying self-service applications across multiple channels (Web Chatbot, SMS, Mobile App and Email) but those applications are frequently developed separately making deployment more complicated and time consuming. Although CX is improved and automation rates increased, customers still don't yet receive a good omni-channel user experience as the context of their journey is not maintained as they move from one channel to another.



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## Contact Center Intelligence

An Evolving company's contact center leverages out of the box and custom reporting. Data provides some analytics and insights, but AI is not yet fully enabled to help automate those insights and the corresponding actions. Reports, analytics and insights are less siloed in nature and have some level of synchronization. Compliance, performance, and sentiment/emotion are supported by speech analytics and reports. However, in Evolving companies, reports containing valuable consumer insights stay in the contact center rather than being shared cross-functionally with other business units.



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## Contact Center Administration

Evolving teams are decisive, and with the support of company leadership can create targeted changes to the customer experience. Results are measured in a shorter time-frame ranging from weeks to months. Evolving contact center infrastructure is managed and optimized in the cloud, either by an in-house team or through a solution provider. Leadership in an Evolving company prioritizes contact center-specific projects as essential for the company's CX strategy.





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# Stage 3: Leading

Companies at the Leading stage of the CX Maturity Model are most likely well into their adoption of cloud based technologies for the contact center. They have started to deploy integrations as a strategy across their ecosystem (CRM and UC) and are starting to create a CX "Toolchain".

AI, automation, digital workforce, cloud-based CRM, and Workforce Optimization (WFO) integrations are most likely fully-implemented allowing business measurement with real-time data, analytics and meaningful insights. Customers can engage in multiple ways (mail, chat, SMS/ messaging, voice) and their experience is seamless and consistent across channels.



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## Workforce

Leading contact centers fully blend their workforce, combining live agents with digital agents, as well as using AI driven technology to assist live agents in real-time. Doing this enables leading companies to dynamically scale and address interaction volume dynamically, this includes managing agent scheduling both programatically and ad-hoc as demand changes.

Agents are provided with AI-powered digital assistance to help guide consumer conversations. They are trained and empowered through gamification, real-time coaching, and career advancement to become "super agents." Agents are also more engaged in customer interactions since the most monotonous work has been off-loaded to digital agents or completed for them through automation.

Supervisors have advanced abilities to manage and measure team performance and can compare and use insights to predict scheduling needs and balance them across a live and digital workforce.



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## Self-Service

Leaders have deployed self-service solutions that delight customers while reducing their cost to serve. Customers are able to solve most problems through self-service channels without needing to speak to a live agent (an increasingly important requirement for digitally savvy consumers). If they are unable to solve their problem or complete their interaction over the self-service channel, they are immediately and automatically transferred to a live agent who is fully armed to take over and complete the interaction.

The experience is also highly conversational. Customers can speak to a virtual agent of the phone in the same way they speak to their Alexa or Google Home device. When engaging through a text channel, they can type in a manner similar to speaking to a human agent.

Consumers also receive a true omni-channel experience. For example, they could start their interaction asking a web chatbot about flight schedules. They could then later call the business's 800 number and engage with a phone-based virtual agent. The IVA would know who the customer is (perhaps by their phone number) and ask if they'd like to complete the interaction that they started on the website.



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## Self-Service

After completing the interaction, the IVA could email or send an SMS with confirmation details and then proactively contact the customer with reminders, updates or changes. Leading companies give their customers a more human self-service experience that reduces customer effort and frustration and leads to higher satisfaction and loyalty.

The vast majority of incoming engagements are addressed through self-service, enabling live, highly empathetic agents to support customers with more complex matters. Agents are also leveraging automated flows to follow up on actions helping ensure customers stay engaged post interaction.



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## Contact Center Intelligence

Leading contact centers' advanced reporting offers a 360 degree analysis across all channels and full visibility into the "CX Toolchain" with contextualization so that CX leaders can get the insights they need to run an effective, efficient and engaged contact center. Analytics and insights are in real-time with dashboards and reporting that spans from standard to advanced, with the ability to customize as well as integrate with other BI tools through APIs. AI is utilized to accelerate analysis and feed dashboards. Multiple AI engines may be in use as customer data and insights are shared and used not just in the contact center but across the business.





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## Contact Center Administration

Change management initiatives within contact center administration of Leading companies are ongoing and “DevOps” like. They are staged, well-executed, and measured in minutes, days, or weeks. The business user is able to make changes to self-service flows and stand up new virtual agents almost instantly. Contact center infrastructure is in the cloud and optimizations are managed by internal teams and/or a solution provider. Customization, workflow automation, and advanced integration are common. AI is used throughout multiple aspects of the contact center such as agent assistance, intelligent virtual agents, interaction and speech analytics, and AI-powered analytics, insights and actions.



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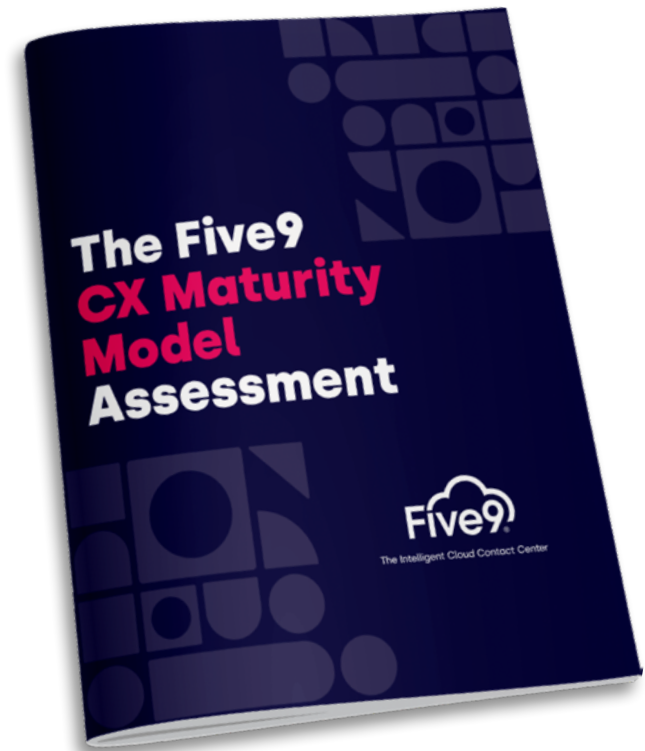
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# Rate My CX Maturity

Hopefully, you now feel you have an even stronger understanding of the different stages and components of CX Maturity, and what it takes to evolve your customer experience strategy. From Emerging to Leading, you should be able to see where your organization currently stands in the model and be able to envision where you may want to be.

Take our free online self-assessment to learn exactly where you stand in the CX Maturity Model and get specific recommendations on where to focus to achieve greater maturity for your organization so that we can help you reimagine your CX and realize results.

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## Now More Than Ever it is Time to Move Your Enterprise Contact Center to the Cloud:

Learn how to evaluate your current contact center and determine whether now is the right time to move to the cloud.



## Stratasy's Moves to the Cloud with Five9:

Learn how Stratasy's moved to the cloud with Five9 to provide the best service possible to its customers and resellers.

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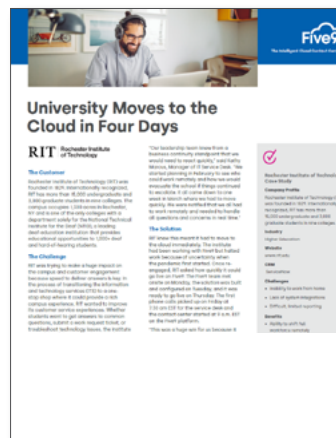
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## Don't Forget About WFO When You Move to the Cloud:

Discover the tangible benefits of WFO on agents, supervisors, and your business. Plus, learn how to evaluate a WFO solution and the functionality you need to get the most out of your investment.



## University Moves to the Cloud in Four Days:

Learn how RIT improved its customer service experience by transitioning their information and technology services (ITS) to a one-stop shop where it could provide a rich campus experience.



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# About Five9

Five9 is an industry-leading provider of cloud contact center solutions, bringing the power of cloud innovation to more than 2,000 customers worldwide and facilitating billions of customer engagements annually. Five9 provides end-to-end solutions with digital engagement, analytics, workforce optimization and AI to increase agent productivity and deliver tangible business results.

The Five9 platform is reliable, secure, compliant and scalable. Designed to help customers reimagine their customer experience, the Five9 platform connects the contact center to the business while delivering exceptional customer experiences that help you build loyalty and trust.

