

# Agent for Salesforce®

## Consolidated agent desktop for fast, personalized service

Driving business results in your contact center is no easy task in today's highly competitive environment. Customers expect a consistent omnichannel experience, with personalized interactions regardless of how they reach out to you. At the same time, you are asked to optimize efficiency and to do more with less. The NICE CXone Agent for Salesforce® provides you with all the tools you need to meet your customers' expectations and achieve your business goals.

### CONSOLIDATED AGENT INTERFACE FOR SALESFORCE CLASSIC AND LIGHTNING

CXone Agent for Salesforce adds a global carrier-grade voice channel and intelligent routing engine to Salesforce digital customer interaction channels—including omnichannel elevation/combination across channels.

Adding CXone intelligent routing of digital channels improves the customer experience through skills-based routing—that combines agent proficiency with customer attributes from Salesforce—to find the best customer service resource for each interaction, enabling faster resolution of customer requests, fewer transfers, and options to provide higher levels of service to premium customers.

In addition, CXone Agent for Salesforce extends the Salesforce Service Console with embedded workforce engagement (WEM) capabilities for agent scheduling, coaching and quality management.

### Optimize Agent and Customer Experience



Personalize customer interactions with customer data at the agents' fingertips



Increase agent efficiency with unified agent desktop that includes WEM

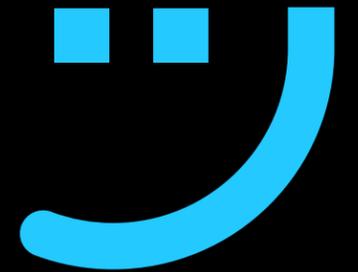


Connect customers to the right resource, on the right channel, right away

Agents have customer data in Salesforce at their fingertips, synchronized with each interaction. Customers are identified based on data such as caller ID or input from the IVR, email address, customer number or other identifying information. This enables the handling agent to personalize each interaction. At the same time, NICE CXone helps enrich the data in Salesforce with automated contact record creation, and the ability to add information to the Salesforce customer record.

Personal reports for agent performance and productivity, as well as current contact center status allow the agent to pace contact handling based on real-time insight and the ability to view their team's statistics fosters competition.

With access to Dynamic Address Books, agents can reach out to contact center and Enterprise resources confidently to resolve a customer issue at the first interaction.



> Learn more

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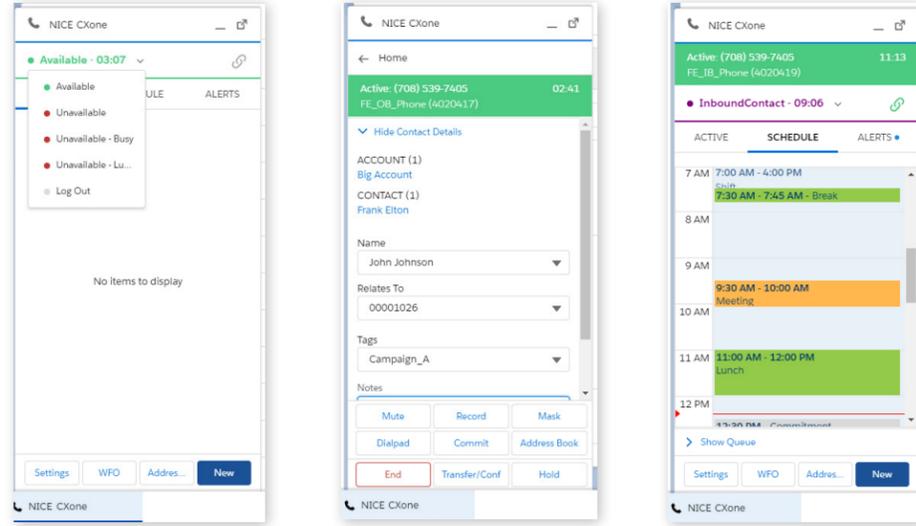
### BENEFITS

- Create more personalized interactions. Empower agents with a 360-degree view of the customer, including insights into previous interactions, regardless of channel.
- Reduce clicks and increase efficiency. Agents can handle voice and digital contacts, plus manage their schedules and performance—all without leaving Salesforce.
- Enable smarter connections to improve CSAT. Use intelligent routing and Salesforce data to connect customers to the right resource, on the right channel, right away.
- Leverage a flexible and agile approach to integration. Eliminate delays, costs and risk with this pre-built integration that deploys in hours and scales as your business needs evolve.

### KEY FEATURES

- Intuitive voice and digital contact handling, agent scheduling, and performance management embedded into Salesforce Sales Cloud, Service Cloud, Health Cloud and Government Cloud
- Global carrier-grade voice channel and intelligent routing engine added to Salesforce digital: chat, email, SMS, cases
- Customer data synchronized with every assigned contact, including activity timeline and contextual hovers
- Skills-based routing directs Salesforce channels to the best-suited agent
- WEM integration enables agents to manage schedules and performance without leaving Salesforce
- Salesforce omnichannel presence integration prevents interruption of voice interactions

## CXone Agent for Salesforce Agent Desktop



Intuitive Agent Interface

Consolidated Agent Controls

Integrated Workforce Engagement

## CXone Packages for Salesforce

NICE CXone	Contact Center			
	Core	Essential	Advanced	Complete
Cloud Native Platform	•	•	•	•
Work from Home	•	•	•	•
Quality Optimized Voice Service with 3 Ports per Agent	•	•	•	•
Softphone	•	•	•	•
Call Recording with 5GB Storage	•	•	•	•
CXone Agent for the CRM of Your Choice	•	•	•	•
Integrated Omnichannel ACD/IVR	•	•	•	•
Integrated Predictive Dialer	•	•	•	•
Visual IVR Studio Designer	•	•	•	•
Contact Center Dashboard & Reporting	•	•	•	•
Quality Management		•	•	•
Workforce Management			•	•
Performance Management Reporting			•	•
Customer Surveys				•
Interaction Analytics				•

CXone skills-based routing takes Salesforce digital channels and routes them to the best-suited agent rather than simply the next available agent. The agent then manages the interaction natively in the Salesforce interface, improving the effectiveness those channels and the customer experience.

Through the integrated CXone Workforce Engagement Suite, agents can now manage their schedules and performance directly in Salesforce. Everything—from shift bids and vacation requests to quality evaluations and coaching sessions—is available at their fingertips, and automatic notifications help them take ownership of their day.

## CXONE AGENT FOR SALESFORCE PROVIDES

- An easy-to-use, intuitive interface with Salesforce screen pops based on customer information such as caller ID or input from the IVR, email address or other identifiers.
- Streamlined omnichannel contact handling in a consolidated interface for inbound and outbound voice, voicemail, work items, as well as Salesforce provided email, chat, text/sms, and cases.
- Integration with Personal Connection for advanced outbound dialing, as well as click-to-dial, to speed up direct outbound calls to phone numbers saved in Salesforce.
- Personal reports for performance and productivity of each agent and the ability to view their team's statistics within the integrated agent interface.
- Automated contact record creation in Salesforce including the ability to write to any field in Salesforce.
- Salesforce omnichannel presence integration with a consolidated state based on both Salesforce and CXone interaction status. This can be used to prevent Salesforce Live Agent chats being assigned to an agent on top of a routed CXone interaction (or vice-versa), for example.

## About NICE

With NICE (Nasdaq: NICE), it's never been easier for organizations of all sizes around the globe to create extraordinary customer experiences while meeting key business metrics. Featuring the world's #1 cloud native customer experience platform, CXone, NICE is a worldwide leader in AI-powered self-service and agent-assisted CX software for the contact center—and beyond. Over 25,000 organizations in more than 150 countries, including over 85 of the Fortune 100 companies, partner with NICE to transform—and elevate—every customer interaction.

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