



avtexas



A ttec<sup>®</sup> Digital Company



PRESENTATION HANDOUT

# Avtex OneView

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Find out how Avtex can help your business.

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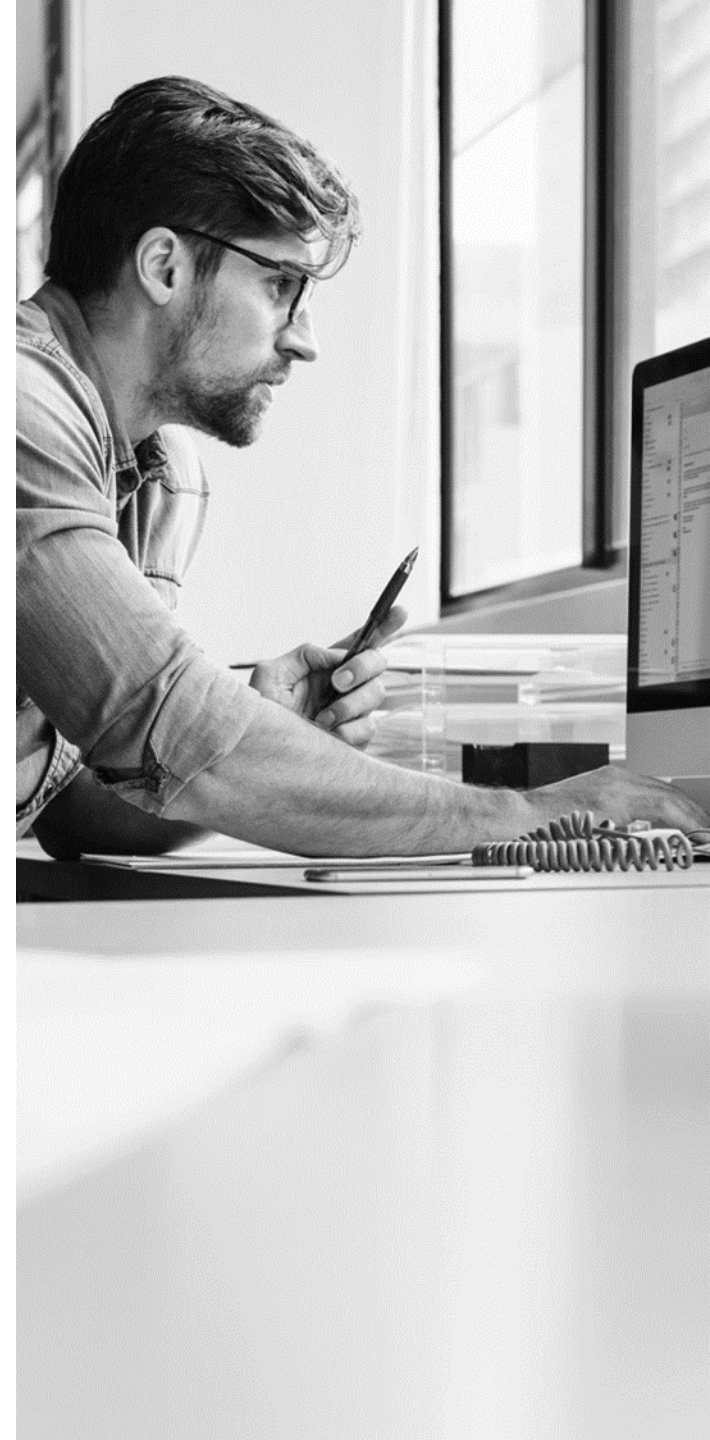


# Overview

OneView by Avtex provides contact center agents with a unified view of Genesys Cloud interactions within Salesforce, fueling exceptional customer experiences consistently with speed and quality.

Unlike traditional softphones that require agents to use a separate window beside Salesforce, OneView is designed with a truly streamlined interface that saves agents time through faster application navigation. And by combining OneView with Salesforce workflows, routine actions can be automated which saves time by reducing keystrokes.

OneView helps increase interaction quality by enabling agents to focus on customers and by providing process guidance. And it can help business teams improve operational performance by giving them access to more data for decision making. It also reduces the time needed to on-board agents.



# Contact Center Teams **Better Business Results**

OneView enables contact centers to deliver better business results by saving agents time, increasing interaction quality and optimizing operations performance.



## Save Agents Time

- Faster navigation / fewer keystrokes
- Automate routine actions



## Optimize Operations Performance

- Access more data
- Faster agent on-boarding



## Increase Interaction Quality

- Greater customer focus
- Reduced errors through automatic operation



## Drive Key Metrics

- Improve AHT, FCR, CSAT, ASAT
- Lower OPEX



# IT Teams **Lower TCO**

OneView enables IT teams to reduce their total cost of ownership by saving time, utilizing existing skills and avoiding obsolescence.



## Save Time

- Minimal effort to implement
- Easy to support



## Utilize Existing Skills

- Use your Genesys Cloud and Salesforce resources



## Avoid Obsolescence

- Software functionality that remains current



# Return on Investment 150 Agents

## Assumptions

- No softphone exists today
- Implement out-of-the-box OneView with screen pop
- Agent cost including overhead: \$35,000
- Agent utilization rate: 80%
- OneView time savings: 45 sec per 300 sec call
- OneView 1<sup>st</sup> year investment: \$30,600

## Returns

- Agent cost savings per year: \$630,000
- Investment payback period: <1 month





## Embedded Interaction Controls in Salesforce Views

- Faster Navigation
- Greater Customer Focus

The screenshot displays the Avtex OneView interface for a call record. The top navigation bar includes 'OneView', 'Accounts', and 'Acme'. The main header shows the call details: 'Voice (inbound, external)', 'TOTAL 10:53', and 'On Queue 13:35'. Below the header, there are several sections:

- Related:**
  - Open Activities(0):** Includes 'New Task' and 'New Event' buttons.
  - Activity History (1):** Includes a 'View All' button.
- Case Comments (1):** Includes a 'New' button and a table of comments.
 

User	Public	Created Date	Comment
User User	<input checked="" type="checkbox"/>	2021-03-03, 5:48 PM	Customer reached out to ask more about our product and how they can automate their business processes. I provided them the documentation on how to utilize Salesforce Flows to speed up their interactions, on board agents faster, and reduce time involved in change management.
- Case History (5):** Includes a table of case history.
 

Date	Field	User	Original Value	New Value
2021-03-03, 5:46 PM	Type	User User	Feature Request	Question

On the right side, there is a 'Credit Loan Application' section with a checklist of completed tasks:

- ✓ Loan Application Complete
- ✓ Salesforce Lead Created
- ✓ Call Transferred to Credit Application Department
- ✓ Call Wrapup Completed

Below this, there is a 'Case Information' section with fields for Case Owner, Case Number, Contact Name, Account Name, Status, Case Origin, Priority, Subject, and Description.





## Embedded Interaction within Salesforce Page

- Faster Navigation
- Greater Customer Focus

The screenshot displays the Avtex OneView interface integrated into a Salesforce page. The top navigation bar includes 'OneView Demo', 'Accounts', and a search bar. The main content area is split into two panels:

- Left Panel (Chat Window):** A chat window for 'Kate Wilson' is embedded. It shows a message from the user: "Hi there, my name is Jarrod! How may I help you today?". A response from 'Kate Wilson' follows: "I there, I would like to understand how to deeply integrate into Salesforce. I saw your product and it looks better then anything else out there. Can you tell me more about it?". A text input field at the bottom is labeled "Type a message".
- Right Panel (Case Details):** A 'General Inquiry' case page for account 'Last Minute Productions' and contact 'Anne Parsons'. The case number is 00004180. The case owner is Jarrod Brooks-Dowsett. The page includes a progress bar with stages: New, In Progress, Escalated, Awaiting Customer, and Closed. Below this are tabs for 'Details', 'Activity', 'Past Chats', and 'Notes'. The 'Details' tab is active, showing customer information (Case Number, Contact Name, Contact Phone, Appointment Time, Has Appointment, Insurance) and description information (Status, Type).

Additional UI elements include a 'Disconnect' button, a 'Select wrap-up code' dropdown, and an 'On Queue' indicator showing 1:21:07. A 'Callbacks (0)' and 'Milestones' section is visible on the right side of the case page.







Populate & Create  
Salesforce Objects

- Saves Agent Time
- Greater Customer Focus
- Increase Data Quality
- Reduce Training

The screenshot displays the Avtex OneView interface for a call record. The call is identified as 'Voice (inbound, external)' with a total duration of 10:33. The interface is divided into several sections:

- Related:**
  - Open Activities(0):** Includes buttons for 'New Task' and 'New Event'.
  - Activity History (1):** A table with columns: Subject, Name, Task, Due Date. One entry is visible: 'First Phone Call' by 'John Doe' with a checkmark in the Task column. A 'View All' link is present.
  - Case Comments (1):** A table with columns: User, Public, Created Date, Comment. One entry is visible: 'User User' with a checkmark in the Public column, created on '2021-03-03, 5:48 PM'. The comment text reads: 'Customer reached out to ask more about our product and how they can automate their business processes. I provided them the documentation on how to utilize Salesforce Flows to speed up their interactions, on board agents faster, and reduce time involved in change management.' A 'View All' link is present.
  - Case History (5):** A table with columns: Date, Field, User, Original Value, New Value. One entry is visible: '2021-03-03, 5:46 PM', 'Type', 'User User', 'Feature Request', 'Question'.
- Credit Loan Application:** A list of tasks with green checkmarks: 'Loan Application Complete', 'Salesforce Lead Created', 'Call Transferred to Credit Application Department', and 'Call Wrapup Completed'.
- Case Details:** A summary card for Case Number '00001020' with fields for Case Owner (User User), Contact Name (John Doe), Account Name (Acme), Status (New), Case Origin (Phone), Priority (Medium), and Subject (Request for more information). The Description reads: 'Customer would like to learn more about OneView and how it helps them fuel exceptional customer experiences'.

At the bottom, there are status indicators for 'OneView (On Queue)' and 'Omni-Channel (offline)'.



The screenshot displays the Avtex OneView interface. At the top, there's a search bar and navigation tabs for 'OneView', 'Accounts', and 'Acme'. Below this, a call log shows a voice call from 4038317952. The call details include 'Voice (inbound, external)', 'TOTAL 10:53', '2 Participants', and 'On Queue 13:35'. A 'Related' section contains three panels: 'Open Activities(0)', 'Activity History (1)', and 'Case Comments (1)'. The 'Activity History' table shows a 'First Phone Call' by 'John Doe' with a 'Task' status. The 'Case Comments' table shows a comment by 'User User' dated '2021-03-03, 5:48 PM' with a detailed description of a customer inquiry. A 'Case History (5)' table at the bottom shows a 'Feature Request' for a 'Question' type. On the right, a 'Credit Loan Application' case is highlighted with a green box, showing a checklist of completed steps: 'Loan Application Complete', 'Salesforce Lead Created', 'Call Transferred to Credit Application Department', and 'Call Wrapup Completed'. Below this, case details like 'Case Owner', 'Case Number', 'Contact Name', and 'Additional Information' are visible.



Integrates with Salesforce  
Process Automation

- Save Agents Time
- Greater Customer Focus
- Reduce Training Time



The screenshot displays the Avtex OneView interface. At the top, there's a navigation bar with 'All' and a search field. Below it, the 'Acme' account is selected, showing a phone number '4038317952' and a user 'Jon Doe'. The main area is divided into several sections:

- Related:**
  - Open Activities(0):** Includes 'New Task' and 'New Event' buttons.
  - Activity History (1):** A table with columns: Subject, Name, Task, Due Date. It shows one entry: 'First Phone Call' by 'John Doe' with a checkmark in the Task column and a 'View All' link.
  - Case Comments (1):** A table with columns: User, Public, Created Date, Comment. It shows one comment by 'User User' on '2021-03-03, 5:48 PM' with a checkmark in the Public column. The comment text is: 'Customer reached out to ask more about our product and how they can automate their business processes. I provided them the documentation on how to utilize Salesforce Flows to speed up their interactions, onboard agents faster, and reduce time involved in change management.' There is a 'View All' link.
  - Case History (5):** A table with columns: Date, Field, User, Original Value, New Value. It shows one entry: '2021-03-03, 5:46 PM', 'Type', 'User User', 'Feature Request', 'Question'.
- Credit Loan Application:** A summary card with a checklist:
  - ✓ Loan Application Complete
  - ✓ Salesforce Lead Created
  - ✓ Call Transferred to Credit Application Department
  - ✓ Call Wrapup Completed
- Case Details (highlighted in green):**
  - Case Owner: User User
  - Case Number: 00001020
  - Contact Name: John Doe
  - Account Name: Acme
  - Additional Information:
    - Status: New
    - Case Origin: Phone
    - Priority: Medium
    - Subject: Request for more information
    - Description: Customer would like to learn more about OneView and how it helps them fuel exceptional customer experiences

At the bottom, there are status indicators for 'OneView (On Queue)' and 'Omni-Channel (offline)'.



Interaction Data for Use in  
Salesforce or Genesys Cloud

- Better Data
- Optimize Performance



# Other Details

## Workspace Transfers

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Transfers Salesforce views opened by the first agent to the next agent. This saves the second agent from having to look up the same information.

## Click-to-Dial

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Agents can click to dial phone numbers within Salesforce objects. This reduces the handle time of contacting clients on initial dial as well as utilizing screen pops for record creation.

## Embedded SIP Endpoint

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The SIP endpoint is embedded within Salesforce. This means the deployment of agents is quicker and easier and it enables agents to work from anywhere.



# Other Details

## Customer Data Stored in Your Environment

All data are stored in client's Salesforce org and Genesys Cloud. No client data are stored on Avtex servers or outside the client's environment.

## Regular Releases

Avtex has a regular product release cycle that keeps up with vendors' products. This ensures the product stays current and the client's investment is protected.



# About Avtex

Avtex, A TTEC Digital company, is a full-service Customer Experience (CX) consulting and solution provider focused on helping organizations create better experiences for their customers. With an unparalleled breadth of knowledge and experience, and partnerships with leading technology vendors like Microsoft and Genesys, we are uniquely suited to address any CX challenge.

Our portfolio of solutions and services supports our unique approach to Customer Experience, which includes two key phases to achieving CX Transformation.

- Our **CX Design** solutions and services aid in the process of defining and improving CX. From journey mapping to CX design thinking, we provide the support you need to set the foundation for CX success.
- Our **CX Orchestration** solutions and services enable the realization of your CX strategy through people, processes and technology. From technology implementation to training, we ensure you have the capabilities to execute your CX strategy.