



avtexas



A ttec® Digital Company



PRESENTATION HANDOUT

# Avtex OneView

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Find out how Avtex can help your business.

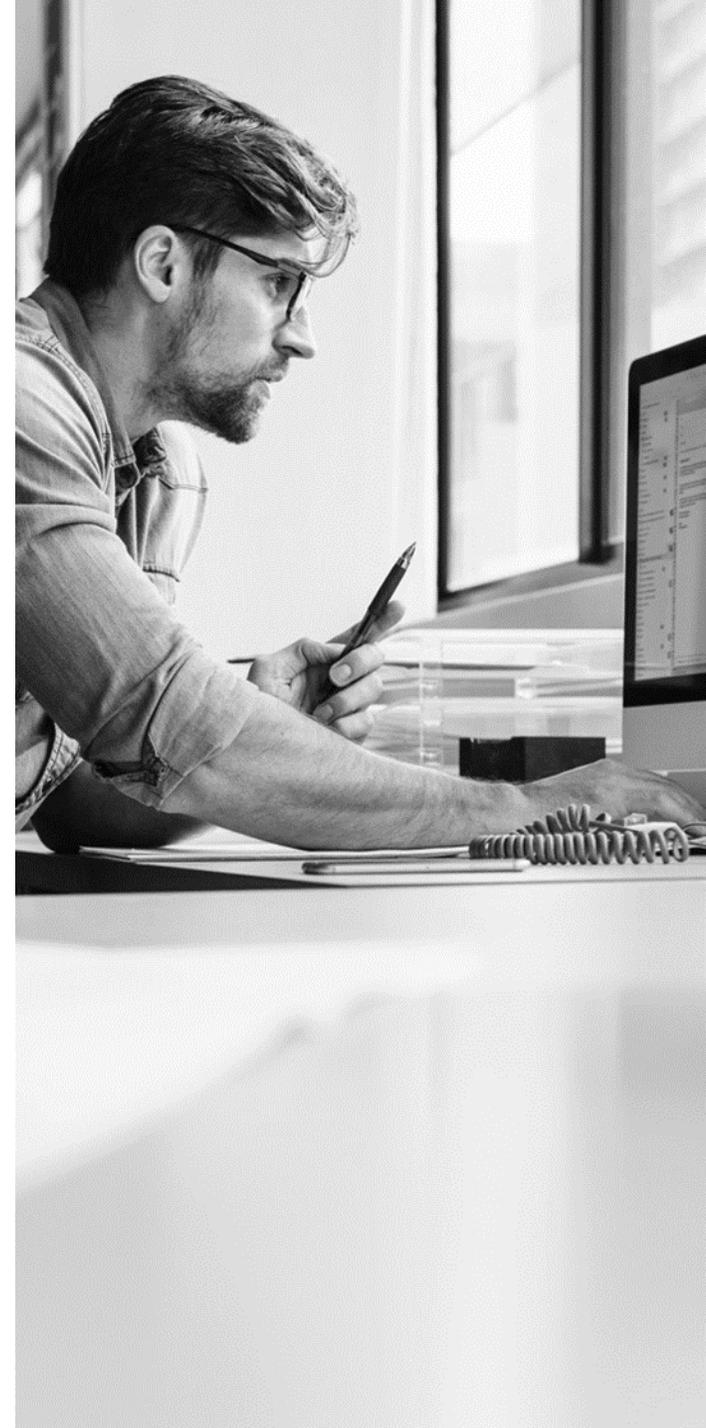
1-800-323-3639 | [contact@avtex.com](mailto:contact@avtex.com) | [www.avtex.com](http://www.avtex.com)

# 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 number '4038317952' and the subject 'Voice (inbound, external)'. Below this, there are sections for 'Related' activities, 'Case Comments', and 'Case History'. A 'Credit Loan Application' summary is also visible on the right side.

**Related**

- Open Activities(0) [New Task] [New Event]
- Activity History (1) [View All]
 

Subject	Name	Task	Due Date
First Phone Call	John Doe	<input checked="" type="checkbox"/>	
- Case Comments (1) [New]
 

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)
 

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

**Credit Loan Application**

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

**Case Details**

- Case Owner: User User
- Case Number: 00001020
- Contact Name: John Doe
- Account Name: Acme
- 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)'.





## Embedded Interaction within Salesforce Page

- Faster Navigation
- Greater Customer Focus

The screenshot displays the Avtex OneView interface integrated into a Salesforce page. The interface is divided into several sections:

- Top Navigation:** Includes a search bar, account tabs (OneView Demo, Accounts), and active chat windows (Last Minute Product..., Avtex 30s).
- Chat Window (Left):** 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?" and a response from the agent: "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 says "Type a message".
- Case Details (Right):** 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. A 'Mark Status as Complete' button is visible.
- Customer Information (Right):** A section containing fields for Case Number (00004180), Contact Name (Anne Parsons), Contact Phone ((403) 816-8499), Appointment Time, Has Appointment (checkbox), and Insurance.
- Description Information (Right):** A section for case description with fields for Status, Name, Type, and Quantity.
- Sidebars (Right):** Two sidebars are visible: 'Callbacks (0)' and 'Milestones' (No milestones to show).





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.
  - Case Comments (1):** A table with columns: User, Public, Created Date, Comment. One entry is visible: 'User User' (checked), '2021-03-03, 5:48 PM', and a comment about providing documentation to speed up interactions.
  - 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 checkmarks: 'Loan Application Complete', 'Salesforce Lead Created', 'Call Transferred to Credit Application Department', and 'Call Wrapup Completed'.
- Case Details:** A form showing fields for Case Owner (User User), Case Number (00001020), Contact Name (John Doe), Account Name (Acme), Status (New), Case Origin (Phone), Priority (Medium), Subject (Request for more information), and Description (Customer would like to learn more about OneView...).

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 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 titled 'Voice (inbound, external)' with a 'TOTAL 10:53' and a search field for participants. A 'Related' section includes 'Open Activities(0)', 'Activity History (1)', and 'Case Comments (1)'. A 'Case History (5)' table is also visible. On the right, a 'Credit Loan Application' case is highlighted with a green box, showing a list of completed tasks: '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 shown.

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



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 current context is 'Acme' with account ID '00001020' and user 'Jon Doe'. The main area shows a call log for 'Voice (inbound, external)' with a duration of 'TOTAL 10:53'. A search bar for participants is present. The call log includes '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' of 'First Phone Call' and a 'Due Date'. The 'Case Comments' table shows a comment by 'User User' on '2021-03-03, 5:48 PM' with the text: '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.' Below this is the 'Case History (5)' table.

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

On the right, the 'Credit Loan Application' details are shown, including a checklist of completed steps: 'Loan Application Complete', 'Salesforce Lead Created', 'Call Transferred to Credit Application Department', and 'Call Wrapup Completed'. A green box highlights the 'Additional Information' section, which includes fields for 'Status' (New), 'Type' (Question), 'Case Origin' (Phone), 'Case Reason' (Instructions not clear), 'Priority' (Medium), and 'Subject' (Request for more information). The 'Description' field contains the text: 'Customer would like to learn more about OneView and how it helps them fuel exceptional customer experiences'.



Interaction Data for Use in  
Salesforce or Genesys Cloud

- Better Data
- Optimize Performance



# Other Details

## Workspace Transfers

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

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

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.