



Twilio Launches Unified Profiles and Agent Copilot, Combining Customer Data and AI to Boost Productivity and Engagement

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By embedding data provided by Twilio Segment's 'Golden' Customer Profiles in Flex, employees have deeper insights into customer behaviors and preferences, enabling more tailored interactions

This marks the first of three launches in 2024 where Twilio will natively embed Segment into Twilio's Communication products

SAN FRANCISCO--(BUSINESS WIRE)--Mar. 27, 2024-- Twilio (NYSE: TWLO), the customer engagement platform that drives real-time, personalized experiences for today's leading brands, today announced the launch of two new innovations within Twilio Flex, the cloud-based digital engagement solution: [Unified Profiles and Agent Copilot](#). Unified Profiles provides businesses with access to a native data layer powered by Segment, enabling the collection and activation of real-time, consented data for personalized interactions. Agent Copilot leverages this data alongside artificial intelligence (AI) to empower employees with automation and boost productivity. This launch marks the first of three products Twilio is committed to bringing to market in 2024, which will natively embed the power of Segment's customer data into its Communication products.

This press release features multimedia. View the full release here: <https://www.businesswire.com/news/home/20240327998949/en/>

"Unified Profiles and Agent Copilot within Twilio Flex showcase the power of merging Twilio's communication channels with Segment's customer profiles to transform customer interactions into personalized, data-informed experiences," said Meera Vaidyanathan, VP of Product, Twilio Flex. "These new products fill the missing piece for businesses looking to leverage data and AI to deliver consistent customer value across different touchpoints. This capability has the potential to transform every customer interaction for brands and empower businesses to enhance customer satisfaction, reduce handle time, and increase employee productivity."

Organizations like [Caring.com](#) and [Universidad Uk](#) are already leveraging these tools to deliver exceptional customer experiences, driving loyalty, growth, and satisfaction for both customers and agents.

"We've seen significant improvements in our support operations and student interaction since integrating Twilio's Unified Profiles and Agent Copilot," said Iván Cantú, COO of Universidad Uk. "In just two months, we've reduced the average handling time for academic inquiries by 30% and, by deploying an AI bot informed by Unified Profiles in real-time to handle a majority of student queries, deflected 70% of our support cases. By combining real-time data from various sources into Flex, we've streamlined our communication processes and proactively supported students in need, furthering our mission to enhance education access in Latin America and Spanish speakers in the US. As we evolve with Twilio's technology, we aim not just to sustain, but to elevate our educational standards and student success."

The holy grail for customer support is for agents to have context about the customer before the conversation begins. However, contact centers have historically struggled with unifying disparate data sources to provide a real-time, comprehensive customer view. The rise of generative AI has led contact centers to receive mandates to adopt and deploy AI solutions aimed at enhancing the customer experience, but they are still trying to figure out the best approach to drive impact for key business metrics. For AI to automate and personalize interactions effectively, it requires a deep understanding of the customer's activity, preferences, and traits. Moreover, reliance on siloed data creates its own set of challenges, leading to extended wait times, wasted agent time, and decreased satisfaction.

Traditionally, unifying and applying this data has demanded significant engineering resources and heavy deployment costs. Now with [92%](#) of businesses using AI-driven personalization to drive growth, collecting customer data across multiple touchpoints in real-time is not just an advantage; it's a necessity to remain competitive. By leveraging the rich, real-time data from Segment, Unified Profiles and Agent Copilot provides companies with a bespoke out-of-the-box solution that automates and enhances employee productivity and customer personalization without the previously required time-consuming build-out, allowing businesses to embrace AI over time.

Introducing [Unified Profiles and Agent Copilot](#): AI-driven agent experiences with real-time data

Unified Profiles is an open and extensible data layer, powered by Segment, that brings together customer data from various sources, including CRM systems, data warehouses, and real-time behavior tracking all into a central real-time profile. This equips sales and support teams with a 360-degree view of the customer, facilitating personalized interactions based on predictive, historical, and real-time insights – milliseconds to retrieve a new profile and seconds to write a new data into a profile. A Segment workspace within Twilio Flex, Unified Profiles delivers immediate access to these insights without requiring a separate Segment contract. Whether a customer is engaging with a support team, making a purchase, or browsing offers, Unified Profiles ensures each and every interaction is precisely tailored to the individual's preferences and activity.

Unified Profiles is designed to be shared across teams and serve not only customer support agents and sales teams, but to extend its benefits across any function in the business. It provides a versatile and dynamic data piece that can be seamlessly integrated into any customer engagement strategy, starting with Twilio Flex. For Segment customers, Unified Profiles becomes more powerful by providing real-time data from each interaction to fuel other Segment-based use cases. This ensures that, with deeper integration into the Twilio ecosystem, customers can unlock unprecedented levels of efficiency and effectiveness.

Agent Copilot leverages large language models (LLMs) to automate and enhance agent productivity. By utilizing the rich, real-time data from Unified Profiles, Agent Copilot assists in intelligent routing, providing agents with actionable insights for each customer interaction, reducing resolution times, and automating post-call summaries. The real-time data fuels the AI algorithms, which generates more nuanced data, creating a flywheel effect. This flywheel continues to deepen your understanding of the customer and provides the data required to evolve, adapt, and grow your business in alignment with changing needs and behavior. With a more streamlined operational process that also enriches the customer experience, agents are free to focus on what matters most: the customer. And with upcoming enhancements, including the ability to suggest next best actions and provide deep insights into customer sentiment, effort, and loyalty, employees can ensure every interaction is as informed and effective as possible.

Together, Unified Profiles and Agent Copilot tackle the operational inefficiencies plaguing contact centers, benefiting customers and teams alike.

Benefits for the end customer include:

- **Quicker Time to Resolution:** Streamlined processes and unified customer data can lead to faster answers and solutions.
- **Contextualized Interactions:** Insights drawn from Unified Profiles, including customer history, preferences, and AI-derived traits such as sentiment, predicted lifetime value (LTV), and churn propensity, facilitate conversations that are tailored to each individual.
- **Seamless, No-Repeat Experience:** Customers don't have to repeat information, leading to a more satisfying interaction.

While agents and businesses can benefit from:

- **Uplift in Productivity Across Teams:** Reduction in the need to switch between applications, recommended responses, and automated wrap-up reports increase efficiency.
- **High Customer Satisfaction:** Enhanced service quality and personalized engagements contribute to greater customer loyalty and customer lifetime value.
- **Reduced Operational Inefficiencies:** Addressing issues like repeat calls and high transfer rates improves overall service and operational performance.

"Businesses struggle to piece together a comprehensive view of the customer due to siloed data and complex system integrations, hindering their ability to leverage AI and deliver personalized customer experiences," said Mila D'Antonio, Principal Analyst at Omdia. " Twilio's launch of Unified Profiles and Agent Copilot provides real-time data to agents, helping them better understand customer activities, preferences, and traits, streamlining operations and enhancing customer interactions."

The acquisition of Segment by Twilio was a move to unlock the power of the #1 CDP for 2022 market share per IDC¹ with Twilio's leading CPaaS for 2023 market share per IDC.² Unified Profiles is a significant step in realizing this vision, promising to deliver personalized experiences and efficiency across all Twilio communication channels, and fundamentally enhance how businesses interact with their customers across various touchpoints.

Additionally, Twilio is extending Flex's capabilities with the introduction of [Flex Mobile](#)³ to cater to the evolving needs of sales and relationship managers, and field agents, by addressing the modern need for mobility and flexibility in work environments. Now entering public beta, this iOS and Android app integrates effortlessly with existing Flex setups, offering a robust solution for professionals who require flexibility to step away from their desks without losing connectivity. It allows for the management of calls, messages, and transfers directly from mobile devices, ensuring that all interactions are logged within the same system, thus bridging the gap between field and support teams and enhancing communication strategies without additional development costs or complexity.

Unified Profiles and Agent Copilot will be showcased at [Enterprise Connect](#) in Orlando at Twilio Booth #911. To learn more about recent developments across Twilio's products, join the [Q1 2024 Twilio Release Webinar](#) on March 27.

About Twilio

Today's leading companies trust Twilio's Customer Engagement Platform (CEP) to build direct, personalized relationships with their customers everywhere in the world. Twilio enables companies to use communications and data to add intelligence and security to every step of the customer journey, from sales to marketing to growth, customer service and many more engagement use cases in a flexible, programmatic way. Across 180 countries, millions of developers and hundreds of thousands of businesses use Twilio to create magical experiences for their customers. For more information about Twilio (NYSE: TWLO), visit: www.twilio.com.

¹ IDC, "Worldwide Customer Data Platform Applications Software Market Shares", 2022: Continued CDP Growth to \$2.7 Billion Proves Value of Unified Data for CX and Digital Business, David Wallace, Doc ##US50861023e, June 2023

² IDC MarketScape: Worldwide Communications Platform as a Service 2023 Vendor Assessment, May 2023, IDC #US50607923.

³ Flex Mobile will be entering public beta on April 2024

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