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PAYCHEX
HR | Payroll | Benefits | Insurance

CUSTOMER STORY · BUSINESS SERVICES

Leading HR, payroll and benefits solutions provider transforms customer care

Paychex realizes the power of a data-driven omnichannel solution with Upstream Works.

KEY RESULTS

- Improved agent experience with an intuitive workspace for all channels
- Improved efficiency with fully integrated workstreams
- Data-driven innovation and the next wave of growth
- Personalized and rewarding customer experience

1 The story behind Paychex

Paychex is a leading provider of integrated human capital management solutions for HR, payroll, benefits, and insurance solutions. Based in New York, Paychex serves clients across the US and Europe.

2 The challenge

The challenge Paychex faced was transforming its service model at the same time as replacing their telephony communication platform. They were offering traditional payroll services through the phone, with an online service component, and wanted to evolve their offering and support customer expectations for digital options.

“Our goal was to give our customers the ability to choose how and when they wanted to interact with us – and on the channels they preferred”, said Carlos Cong, Director, Enterprise Technology Services, Paychex.

3 Our solution

Paychex chose Upstream Works for Finesse (UWF) for its omnichannel capabilities with the flexibility to support consistent customer care across all channels including voice, fax, email, chat, SMS, and more. A web-based application within Cisco Finesse, it provides agents with one intuitive and consistent workspace for managing all customer interactions.

- Voice
- Email
- Chat
- SMS
- Fax
- Chat bot

> *The 'wow' factor for me was the fact that it was a consistent and intuitive user interface no matter which channel you are on. I could see how it would be easy for agents to use and that we would be able to provide great service to our clients.*
>
> **Carlos Cong**
> Director, Enterprise Technology Services, Paychex

Cong explained the capabilities of UWF that appealed most to Paychex. It was important to Paychex to have a flexible solution to support their vision for transformed customer care. They needed a solution that provided the data to meet their customer experience goals. Having the data on items like the cost of care, provided the information needed for continuous improvement for both internal processes and client service. With clients having multiple geographic locations and layers of products, the requirement for a flexible solution was critical.

At the same time Paychex was implementing UWF, they were also implementing a new communications platform. UWF was introduced while changes to the service provider and engineering were made. Other developments included planning for new capabilities in the future, and servicing clients across new communication channels, making the overall situation and process complex.

The Paychex UWF users include Dedicated Service Advisors and Multi-product Specialist teams. They started with phone-based interactions and expanded to include additional channels including email and chat. The Paychex business model includes direct relationships between service providers and clients, and they needed a way to ensure that emails routed by the system could be presented to the agent responsible for the specific client relationship.

"Upstream Works sat with us to thoroughly understand our requirements and the result was a one-to-one email solution," says Cong. "We were able to recognize that over 70 percent of the interactions that our service providers were having were through these direct emails. This was data that we didn't have until we enabled this feature."

4 What Paychex finds impactful

Customer channel choice

Paychex needed the flexibility to extend its phone support to digital channels with a level of service its customers had come to expect. This meant being able to deliver a consistently, exceptional customer experience across each of its channels by providing their service workforce with the right tools and access to information. It was important to Paychex to keep the focus on optimizing each interaction. Upstream Works provides Paychex users with an intuitive desktop that enables smart workstreams, full visibility, consistent tools, and unified communication channels including phone, email, chat bot, and SMS, for meaningful and rewarding interactions. Paychex plans to expand customer conversations with social messaging like Facebook Messenger and WhatsApp, supporting their vision of workstreams that take the focus off the channel and put it on the interaction itself.

Improved efficiency with third-party integrations

With UWF's integration capabilities, Paychex derives further benefits. Multiple, third-party application integrations with screen pop, publications, and transcripts optimizes efficiency. Integrations include: Bot, CRM, Knowledge Management, Ticketing System and Workforce Management software. The Paychex service workforce has visibility to see interaction records, full transcripts, active and closed cases and quick access to information needed to provide an efficient and rewarding customer experience.

Bot escalation to human agent

As customers embrace self-service options, Paychex wanted to support them with a chat bot that can answer commonly asked questions and resolve routine interactions. If the question is too complex, it gets transferred to a live agent who can pick up right where the bot left off. "It's a win-win," says Cong, "Customers are able to self-serve and our agents are able to spend their time on more mission-critical interactions."

The power of UWF data

Since implementing the UWF solution, Paychex has realized the power and positive impact that the solution data provides. When asked about how the new visibility into data impacted Paychex, Cong replied "It was an eye opener for the entire company, and now has led into a bunch of other things, like how do we leverage AI? What can we do with text analytics? How do we leverage some of that data to improve our self-service options on our website?"

Cong elaborates on how UWF data is being used to help the organization: "It's endless. We use it to predict costs, identify trends, track the customer journey. We also use the live data to make real-time decisions on the fly." Paychex uses UWF reports to support dashboards, tailored reports, day-to-day and operational management.

5 The difference

When asked what it was like to work with Upstream Works as a vendor, Cong says: “What made us successful throughout this entire process was being able to work directly with the Upstream Works team. We were able to find a rhythm and work through any challenges successfully.” The teams continue to work closely together to evolve their service offerings, innovate and grow, and wow their customers.

6 What’s next

With thousands of UWF users today, Paychex plans to extend UWF to 100% of their service workforce. They plan to continue extending customer options and leveraging AI in new ways.

> *It’s about getting the most out of every interaction – pinpointing relevant opportunities and maximizing the value. The future is a cognitive contact center that takes away mundane, repetitive manual processes that our service providers are having to do, increasing efficiencies and making the customer experience effortless and rewarding.*
>
> **Carlos Cong**
> Director, Enterprise Technology Services, Paychex

About Paychex

Paychex is a leading provider of integrated human capital management solutions for human resources, payroll, and insurance services for small and medium-sized businesses. They have approximately 15,000 employees serving approximately 710,000 payroll clients across more than 100 locations in the US and Europe. Services include a fully outsourced HR solution, payroll processing, retirement services, and insurance.

www.paychex.com

About Upstream Works

Upstream Works makes contact-center and customer-experience software. Its platform, Totalix™, is a CRM-embeddable agent workspace for human and AI agents that goes live inside a business application in minutes in the cloud. Upstream Works sells through more than 50 partners and is ISO 27001:2022, SOC 2 and HIPAA compliant. Headquartered in Woodbridge, Ontario, with 25 years in CX.

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Story first published August 2021 (document 210804); re-issued in the 2026 Upstream Works brand with the published text unchanged. The product in this story, Upstream Works for Finesse (UWF), is the Cisco Finesse desktop Paychex ran at the time; products and versions have moved on since (Totalix™, version 8). Document UW-CS-PAYCHEX-2611. © 2026 Upstream Works Software Ltd. All rights reserved. Upstream Works, Totalix™, AgentNow and their respective logos are trademarks of Upstream Works Software Ltd. All other trademarks and logos belong to their respective owners.