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Genesys Cloud CX Use Cases

Genesys Work Automation (B001) for Genesys Cloud

Extend journey orchestration to back-office workflows

What's the challenge?

In today's digital landscape, delivering seamless customer experiences is crucial for any organization's success. However, crafting a truly delightful experience goes beyond the initial interaction in the contact center. It requires a intentional approach, orchestrating both the customer interactions, originating in the contact center, and the back-office tasks, such as order fulfillment, account updates, and technical support, that ensure a positive outcome. Brands fail to meet these expectations if work falls through the cracks, leading to frustrated customers and inefficiencies within the organization. Employee morale can suffer with mounting workloads, while the business faces issues like low utilization, failed SLAs, high transfer rates, customer churn, lower sales, and poor visibility into overall performance. To address these challenges, organizations need a better way to orchestrate work from the first interaction in the contact center all the way through to resolution.

What's the solution?

Extend end-to-end journey orchestration to the back office. Provide a single pane of glass to agents to handle all work. Provide end-to-end observability and management.

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Use Case Overview

Story and Business Context

Routing work effectively into the contact center unlocks a multitude of business benefits that significantly impact customer experience and operational efficiency. It is challenging to balance and distribute high volumes of work items along with interactions, quickly, and in accordance to the underlying customer commitment or SLA. While many have invested in automation, these systems and applications focus on the process and not the employees who actually complete the processes. Here's a breakdown of the key value propositions:

Unified View & Orchestration:

Single Pane of Glass: By routing all work, including interactions and tasks, through a central platform, businesses gain a holistic view of customer journeys. This eliminates information silos and facilitates seamless handoffs, ensuring agents have a complete context for each interaction.

End-to-End Journey Orchestration: Routing extends beyond initial contact, allowing for the orchestration of the entire customer journey. This enables automated routing of tasks based on specific needs, ensuring prompt resolution and a consistent experience across touchpoints.

Enhanced Efficiency & Faster Resolution:

Automation: Effective routing connects and automates tasks between agents and backend systems (e.g. CRM, ERPs), streamlining workflows and minimizing manual processes. This translates to faster resolution times for customer issues, improving overall satisfaction.

End-to-End Observability & Management: Real-time visibility into the entire service process, facilitated by effective routing, enables proactive identification of bottlenecks. This allows for targeted interventions and resource allocation, optimizing agent utilization and reducing wait times.

Proactive Planning & Improved Customer Experience:

Accurate Forecasting & Scheduling: By analyzing historical data and routing patterns, businesses can accurately forecast workload and schedule agents accordingly. This proactive approach ensures adequate resources are available to meet customer demands, minimizing hold times and frustration.

Eradicating Bottlenecks: Effective routing helps identify and eliminate bottlenecks throughout the customer journey. This proactive approach ensures a smooth and seamless experience for customers, preventing frustration and fostering positive brand perception.

Strategically routing work into the contact center goes beyond simply connecting agents with customers. It unlocks a comprehensive framework for optimizing agent efficiency, streamlining operations, and ultimately, delivering an exceptional customer experience.

Use Case Benefits*

The following benefits are based on benchmark information captured from Genesys customers and

may vary based on industry, lines of business or Genesys product line:

Use Case Benefits	Explanation
Improved Agent Competency	Increase throughput, utilization, and efficiency in agents' work, by delivering the tasks to the agents UI (User Interface) in push mode via screen pop together with interaction context and history in blending mode. Improve work item handling agility through the display of task-related external documents, references, and contextual information together with the work items
Improved Customer Experience	Deliver committed workitems on time and provide better quality answers by better matching work-types to employee skill sets
Improved Employee Attrition Rate	Offer fair balance of workload among all available resources
Improved Employee Occupancy	Improve occupancy by reducing idle time and reducing handling time (AHT) through automated work item routing distribution based on work item attributes and agent/employee skills
Improved First Contact Resolution	Provide more timely and complete insights through distribution of tasks with the full customer context
Reduced Administration Costs	With automated workitem distribution, supervisors reduce the time spent doing manual work allocation, one-to-one agent/employee monitoring and manual scheduling and reporting

Summary

Genesys Work Automation is a modern, cloud native approach to workitem routing and process automation purpose built for Genesys Cloud. It is intended for work that originates from the contact center to be easily tracked, automated and forecasted for agents.

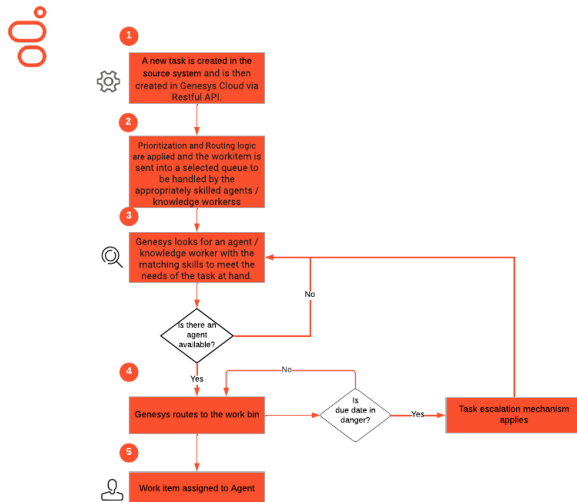
Genesys Work Automation enables effective management and distribution of work items and high value leads in the contact center. This distribution occurs across multiple departments to the best-suited agent, based on business segmentation, resource skills, and availability.

Genesys can receive and capture work from multiple source systems. The work item will be created and assigned to a pre-defined work type based on the business logic created. Tasks can be distributed to workbins where agents and supervisors can fetch tasks from there or can also be automatically assigned to an agent.

Use Case Definition

Business Flow

Work Automation - Business Flow



Business Flow Description

1. A new task is created in the source system (BPM, CRM, or Workflow) and is then created in Genesys Cloud via Restful API.
2. Based on predefined business logic from the known worktype, prioritization and routing logic are applied and the workitem is sent into a selected queue to be handled by the appropriately skilled agents.
3. Using any number of different routing methods, Genesys looks for an agent / knowledge worker with the matching skills to meet the needs of the task at hand. Should no agents be immediately available, business logic may be defined to increase the priority of the waiting workitem, change queues, or even send alerts to supervisors who may help get the work assigned.
4. If the task is not handled within the time threshold (calculated as a percentage of the SLA), the task is sent back to Genesys for escalation handling. Escalation handling may include:
 1. Distribution to another agent / agent group workbin, or
 2. Distribution to a supervisor workbin
 - Tasks continue to be reprioritized at regular intervals, even if they are distributed to a workbin, to ensure that their priority reflects the proximity of the due date.
5. Genesys Work Automation supports two different workflows:
 1. Push - Agents are assigned the work item, get notified of the new assignment, and work directly on it on the Genesys UI. Genesys supports both automated assignment via routing or manual assignment from the task list.

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- 2. Pull - Agents can view all work item in a work bin and select from the list which task they want to work on.
For both Push and Pull use cases, when the work is completed, Genesys generates a trigger for the source system to synchronize any changes in attributes to the source system and closes the task.

Business and Distribution Logic

Business Logic

Refer to Additional Documentation section for resources on configuring the business logic for this use case.

Distribution Logic

Refer to Additional Documentation section for resources on configuring the distribution logic for this use case.

User Interface & Reporting

Agent UI

This use case requires the Agent using the Agent UI with the Task List:

Priority	Due Date	Expiration Date	Status	Routing State	Assigned To	Worktype	Queue	Name	Date Created	External Tag
0	08/25/2023, 11:45 AM	10/24/2023, 11:45 AM	Open	Held (Roster)	Madison	Self-Registration 2024 ...	Self-Registration Queue	Self-Registration Queue	07/26/2023, 11:45 AM	-
0	08/30/2023, 10:03 AM	04/01/2024, 6:59 PM	Day 11	Disconnected	Self-Registration	Self-Registration 2024 ...	Self-Registration Queue	Self-Registration Queue	07/31/2023, 10:03 AM	-
0	08/25/2023, 5:35 AM	10/24/2023, 5:35 AM	Open	Connected	Madison	Self-Registration 2024 ...	Self-Registration Queue	Self-Registration Queue	07/26/2023, 5:35 AM	-
0	03/08/2024, 12:54 PM	05/07/2024, 1:54 PM	Closed	Disconnected	Chris Giddens	Self-Registration 2024 ...	Self-Registration Queue	Self-Registration Queue	02/07/2024, 12:55 PM	-
0	08/25/2023, 11:37 AM	01/01/2024, 6:59 PM	Open	-	Unassigned	Self-Registration 2024 ...	Self-Registration Queue	Self-Registration Queue	07/26/2023, 11:37 AM	-
0	08/25/2023, 11:38 AM	10/24/2023, 11:38 AM	Day 8	Parked (List)	Madison	Self-Registration 2024 ...	Self-Registration Queue	Self-Registration Queue	07/26/2023, 11:38 AM	-
0	03/08/2024, 12:54 PM	05/07/2024, 1:54 PM	Closed	Disconnected	Chris Giddens	Self-Registration 2024 ...	Self-Registration Queue	Self-Registration Queue	02/07/2024, 12:57 PM	-
0	03/08/2024, 12:54 PM	05/07/2024, 1:54 PM	Closed	Disconnected	Chris Giddens	Self-Registration 2024 ...	Self-Registration Queue	Self-Registration Queue	02/07/2024, 12:57 PM	-
0	08/30/2023, 10:03 AM	10/29/2023, 10:03 AM	Open	Connected	Madison	Self-Registration 2024 ...	Self-Registration Queue	Self-Registration Queue	07/31/2023, 10:03 AM	-
1	03/29/2023, 12:32 PM	05/28/2023, 12:32 PM	Closed	Parked (List)	Self-Registration	Self-Registration 2024 ...	Self-Registration Queue	Self-Registration Queue	02/27/2023, 11:32 AM	0000000000000000
1	10/25/2023, 11:59 PM	01/24/2024, 11:59 PM	Open	Connected	Madison	Self-Registration 2024 ...	Self-Registration Queue	Self-Registration Queue	02/27/2023, 11:30 AM	-

Reporting

Real-time Reporting

N/A

Historical Reporting

N/A

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

All of the following required:	At least one of the following required:	Optional	Exceptions
None	None	Digital <ul style="list-style-type: none"> Genesys Email Routing (CE16) 	None

General Assumptions

- There is no direct migration path from iWD and IPA to Work Automation.
- Work Automation will enable CX Evolution for iWD and IPA customers. Customers will likely need to re-engineer their workflows and implementations to adapt to Work Automation.
- Implementation of the business process and prioritization logic are supported through Architect and Work Automation Triggers.
- Network communication between Genesys and the source of external contextual data is enabled.

Customer Responsibilities

- Work Automation use case with tasks arriving from a source system use a provisioned bi-directional REST capture point.
- The customer handles the Genesys Work Automation integration of the source system.
- Any source-system changes needed for the integration with Genesys are within the customer responsibility.
- The source system must support the update of work items in Genesys Work Automation as required by the work item life cycle (complete, update, pause, resume, cancel, and so on).
- Work items appear in this use case as the "workitem" media type
- Customer has reviewed the Work Automation roadmap to align their CX Evolution timelines with Work Automation roadmap.

Related Documentation

Genesys Cloud Routing Methods

Genesys Cloud ACD uses a queue's routing method to determine how to match interactions and agents. When using a skills-based routing method, the evaluation method determines how Genesys Cloud processes skill requests for interactions. A customer can request skills, for example, from the IVR. The evaluation method (when used) and the routing method for the queue determine the way that Genesys Cloud matches the interaction with an agent.

- <https://help.mypurecloud.com/articles/acd-evaluation-routing-methods/>
- <https://help.mypurecloud.com/articles/advanced-routing-overview/>

Workflows and business logic

Administrators can launch workflows to automate workitems using Architect and Triggers.

- <https://help.mypurecloud.com/articles/work-with-workflows/>
- <https://help.mypurecloud.com/articles/about-triggers/>

Document Version

- Version **v1.0.0** last updated **May 17, 2026**