



This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

# Genesys Cloud CX Use Cases

Genesys Outbound Dialer (CE11) for Genesys Cloud

2/28/2024

---

## Improve customer communications and increase sales conversion using powerful dialer capabilities

### What's the challenge?

Dialing for sales outreach is a hard job that requires specialized skills. Low agent utilization due to sub-par dialers, manual dialing, lack of appropriate blending of inbound/outbound result in fewer sales conversions.

### What's the solution?

Deliver coordinated outreach and create optimal engagements based on agent availability while reducing costs. Improve the ROI of outbound sales campaigns by efficiently acquiring, up-selling, and winning back customers through automated and assisted calling campaigns by using a powerful dialer for voice calls and IVR for voice messaging.

[Link to video](#)

### Other offerings:

- 
- 

## Contents

- [1 What's the challenge?](#)
- [2 What's the solution?](#)
- [3 Use Case Overview](#)
  - [3.1 Story and Business Context](#)
  - [3.2 Use Case Benefits\\*](#)
  - [3.3 Summary](#)
- [4 Use Case Definition](#)
  - [4.1 Business Flow](#)
  - [4.2 Business Flow](#)
  - [4.3 Business Flow](#)

- 
- 4.4 Business and Distribution Logic
  - 5 User Interface & Reporting
    - 5.1 Agent UI
    - 5.2 Reporting
  - 6 Customer-facing Considerations
    - 6.1 Interdependencies
  - 7 Related Documentation
    - 7.1 Document Version

---

## Use Case Overview

### Story and Business Context

A company must make outbound calls to start contact with its customers which are based on specific business rules for sales, marketing, care, or collections. This use case describes the ability to configure and run outbound dialing campaigns - both automated and agent-assisted - based on customer-provided contact lists.

Generating new business and up-selling existing customers is a critical part of any business. The challenges of Sales and marketing organizations include improving the efficiency of their team members increasing reach, contact rates, response rates, revenue, and complying with industry regulations.

Sales and lead development reps are manually dialing customers and prospects for sales and marketing purposes, which are expensive and wastes time. Companies are managing communication channels in silos and don't have an integrated, multichannel outbound platform. All companies must follow industry regulations and manage for compliance risk.

#### *Improved Effectiveness / Higher Return on Investment*

- Improved Return on Investment of outbound sales and marketing campaigns (for example telemarketing; upsell/cross-sell; customer win-back; loyalty/promotions)
- Leads are routed to sales agents within seconds (not minutes, hours, or days) since "speed to lead" follow-up is crucial in many sales environments. This drives lead contact rates and conversion rates while decreasing call abandonment rates
- Sales departments are using predictive, progressive, and preview dialing modes instead of making manual dials and outbound call volume is efficiently paced. The various dialing modes result in more sales conversations and increases agent productivity
- Companies are using multiple channels

#### *Happier Agents*

- Automated channels are used when appropriate to improve agent efficiency and satisfaction by removing low value calls and wasted time
- Productive and highly utilized agents have more opportunities to close business and meet their sales quotas

#### *Happier Legal Team*

- Compliance and business rules are accurately maintained to ensure enterprise-wide contact strategy adherence

### 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 Conversion Rates	Conversion rates, cross-sells, and up-sell rates improve through the ability to automatically generate outbound calls and empowering agents with single searchable desktop application that shows customer context.
Improved Employee Utilization	Use agents/employees for outbound campaigns. Optimize the number of agent-handled calls by increasing the number of Right Party Contacts through predictive dialing.
Increased Contact Rate	Automated handling of voicemail and unanswered calls improves right party contacts.
Reduced Customer Churn	Improved customer experience, and in consequence, a reduction in customer churn allows organizations to save on the costs associated with acquiring new customers plus avoids the loss of future revenue.
Reduced Volume of Interactions	Send communications proactively through outbound channels. Drive inbound calls by using agent or automated messaging and CID.

## Summary

The Genesys system supports both agent-assisted and automated outbound call campaigns in various dialing modes, including predictive, power, progressive, preview, and agentless. Companies tell Genesys which consumers they want to contact. Companies blend contact strategies and escalate outreach attempts from automated calls to agent-assisted. The system records delivery results for use in reports.

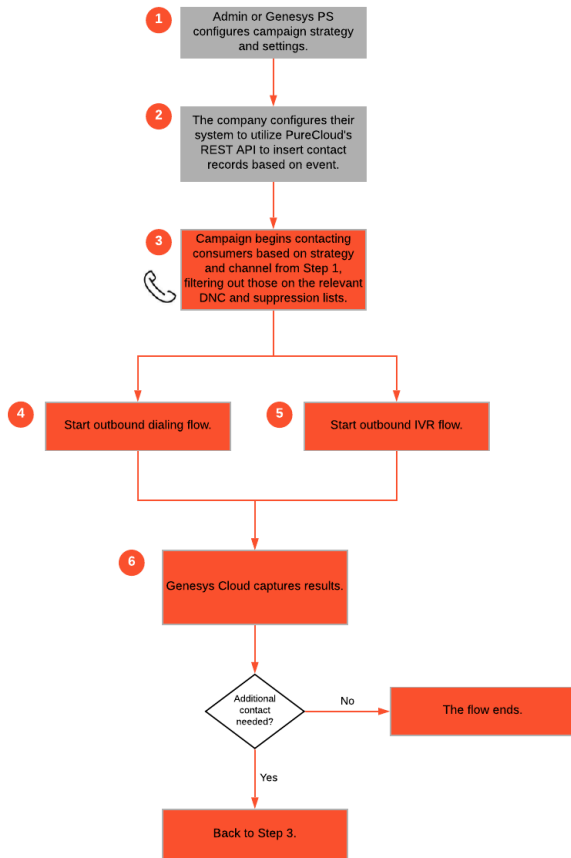
A company can use its marketing, CRM, or collections system to generate contact lists based on a one-time event, recurring events, or trigger-based events. The contact lists include the appropriate contact details, such as contact name, contact phone number, and contact reason. The system records delivery results for use in reports.

Sales and lead development reps are manually dialing customers and prospects for sales and marketing purposes, which are expensive and wastes time. Companies are managing communication in silos and don't have an integrated, outbound dialing campaign. All companies must follow industry regulations and manage for compliance risk.

## Use Case Definition

### Business Flow

(1)

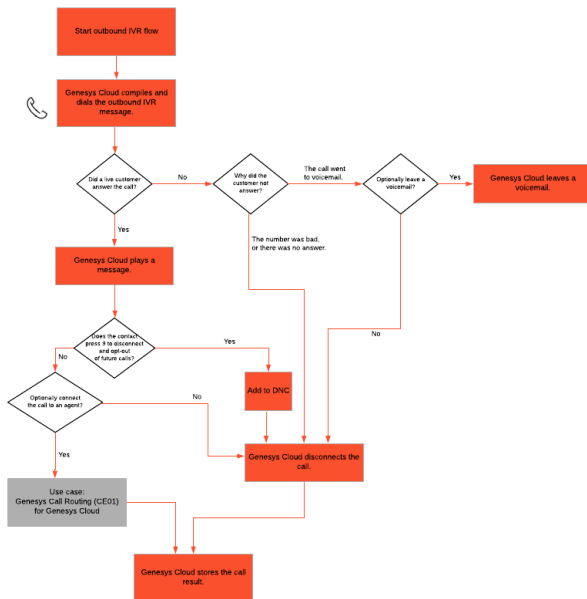


## Business Flow Description

1. An admin (or Genesys PS) configures the campaign strategy and settings in Genesys Cloud CX.
2. The admin loads the contact(s) in Genesys Cloud CX. This is done either manually via a .csv file or via the API.
3. The campaign begins contacting consumers based on the campaign strategy set in Step 1. Before starting a call, Genesys Cloud CX checks each contact or record against the associated Do Not Call lists. Genesys looks at the callable time set or the time zone mapping (depending on the customer's preference), and any other custom rules the customer has designed. (BL1, BL2)
4. The person constructing the campaign in Genesys Cloud CX configures the dialing mode as Preview, Progressive, Power, Predictive, or Agentless - see Outbound Dialing Flow for details
5. For an outbound IVR, there are several possible results (BL1, BL2, DR1) - See Outbound IVR flow for details
6. Based on the call result, Genesys Cloud CX may make additional attempts to reach the contact in the same channel. This is configured in the campaign settings in Step 1 of this use case. (DR1)

## Business Flow

### (2) Outbound IVR Flow

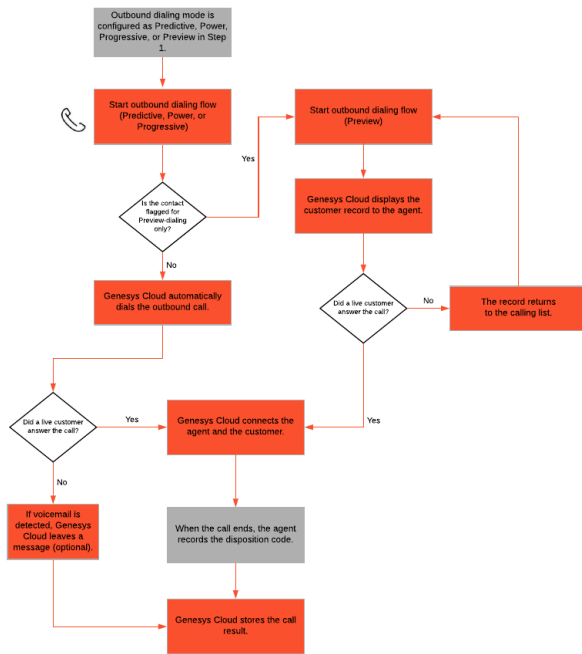


**Business Flow Description** For an outbound IVR, there are several possible results (BL1, BL2, DR1):

- Bad number or no answer
  - The call disconnects.
  - Genesys Cloud CX automatically stores the call result.
- Answering Machine
  - The call either disconnects, is sent to a queue to be handled by an agent, or a message is played (based on the chosen configuration in Step 1).
  - Genesys Cloud CX automatically stores the call result.
- Live party connect
  - The call plays the outbound IVR message.
  - The contact can opt out of future calls. To do this, include the IVR option, “Press 9 to opt out of future calls.”
  - (Optional) The customer's admin can offer the option to connect to a live agent (based on the chosen configuration.) To do this, include the IVR option, “Press 2 to connect to a live agent” and then route calls to a phone number provided by the company.
  - If the contact does not choose to connect to a live agent, the call disconnects.
  - Genesys Cloud CX automatically stores the call result.

## Business Flow

### (3) Outbound Dialing Flow



**Business Flow Description** The person constructing the campaign in Genesys Cloud CX configures the dialing mode as Preview, Progressive, Power, Predictive, or Agentless:

- In Preview mode, the agent receives or retrieves a record and initiates the call. An optional timer automatically launches the call for the agent.
- In Progressive mode, Genesys Cloud CX automatically places the call-based agent availability for the specific campaign. Call analysis ensures connections (human or machine answers).
- In Power mode, Genesys Cloud CX automatically places calls in parallel based on a pacing algorithm that determines when an agent is available.
- In Predictive mode, Genesys Cloud CX automatically places the call based on the pacing algorithm and expected agent availability.
- In Agentless mode, Genesys Cloud CX automatically places calls based on the number of lines specified in the campaign settings. Depending on whether a machine or live person answers the call, the call can either be transferred to an outbound flow (IVR) or disconnected.
- For each call attempt, there are several possible results:
  - Bad number or no answer:
    - In Preview mode, the agent hangs up and chooses a wrap-up code that Genesys Cloud CX stores with the call record.
    - In Progressive, Power, Predictive, or Agentless modes, the call disconnects and Genesys Cloud CX automatically stores the call result.
  - Answering machine:
    - In Preview mode, the agent can optionally leave a message. Based on the wrap-up code chosen by the agent, Genesys Cloud CX could try the call again later. Genesys Cloud CX automatically stores the call result.



---

## Business and Distribution Logic

### Business Logic

#### BL1

##### Contact Records

The admin loads the contacts in Genesys Cloud CX. Genesys does not configure the API calls from external systems to add contacts. A custom solution can do this work as a custom SOW at extra cost.

##### Agentless Campaigns

The customer can configure their campaigns with various dialing modes, including Agentless (IVR). The customer or Genesys PS configures the dialing mode of a campaign before uploading the contact list. The admin or Genesys PS also configures any pre-recorded messages and IVR flows for automated outbound calls.

##### Campaign Settings

The customer admin or Genesys PS configures various campaign settings such as:

- Scheduling
- Maximum attempts
- Do Not Call (DNC) options
- Default\* agent script
- Contact list
- Pacing
- Rule sets
- Priority
- Sorting (Dynamic or Static)
- Caller ID
- Filter
- ACD queue
- Time zone mapping

\*More advanced scripts are part of the Genesys services catalog.

- In Progressive, Power, Predictive, or Agentless modes, the call can be disconnected, sent to an agent's queue, or sent to the outbound Architect flow (IVR) to hear a message (based on the chosen configuration in Step 1). Genesys Cloud CX automatically stores the call result.
- Live party connect:
  - The call plays the outbound IVR message.
  - The contact can opt out of future calls. To do this, include the IVR option, "Press 9 to opt out of future calls."
  - (Optional) The customer's admin can offer the option to connect to a live agent (based on the chosen configuration.) To do this, include the IVR option, "Press 2 to connect to a live agent" and then route calls to a phone number provided by the company.
- If the contact does not choose to connect to a live agent, the call disconnects.
- Genesys Cloud CX automatically stores the call result.

---

## Dialing Mode: Preview, Progressive, Power, Predictive, Agentless

A customer can choose to run outbound dialing campaigns using Preview, Progressive, Power, Predictive, or Agentless modes. Either the customer admin or Genesys PS configures the campaign. A customer can also designate specific contacts to always be dialed in Preview mode (Precise Dialing). Preview mode ensures that an agent is available when the specific customer answers.

If Preview mode is used, customers can assign ownership to an agent so they will only those records. This is helpful by combining several individual campaigns into a single one.

## Answering Machine Detection (AMD)

Call analysis (CPD) that includes AMD detects whether an answering machine or a live person is answering the phone before connecting the call to an agent. A customer can also choose whether to disconnect, play a message, or send the call to an IVR flow when a call connects. A customer can also disable AMD for compliance reasons, or if the customer wants to have agents handle all connected calls to ensure that an agent is available when the customer answers.

## BL2

### DNC Lists

Do Not Contact lists should include customers who have opted out of previous campaigns and a country-specific DNC list (if applicable). A customer can apply multiple DNC lists to a campaign. When a consumer opts out of a campaign, they should be added to the DNC list. Customers can also upload another DNC list or add an individual to an existing DNC list. These suppression lists can then be applied to future campaigns at the campaign level. DNC lists can also be outsourced to one of our integrated partners, DNC.com, or Gryphon Networks. They can manage their subscriptions to those services and customize several options including wireless and VoIP identification.

For internal DNC lists, users can now set an expiration time/date for a DNC record. After this time, the system will ignore the entry and proceed with making an attempt. Our DNC.com integration features the ability to block restricted days such as state holidays as well as specific time of day restrictions.

### Personalization

For Agentless (IVR) campaigns, the content of the messaging can be personalized (TTS audio).

### Distribution Logic

## DR1

### Agentless - Connect to Agent Option

Agentless option requires implementation of Inbound, please see the Use Case Interdependencies section.

---

## User Interface & Reporting

### Agent UI

- The agent must be able to add contacts to the Do Not Call list (DNC) or to make the contact uncallable via the agent script or wrap-up code.
- The agent must be able to enter a wrap-code for each call (such as Cross Sell, Need Follow Up, Not Right Skill, Processed, Stopped, Transferred, Up Sell). The Customer Admin or Genesys PS configures the wrap-up codes (included within the corresponding use cases).

### Reporting

#### Real-time Reporting

Use Genesys Cloud CX Performance dashboards and views for real-time reporting on active outbound campaigns. Use agents for outbound dialer campaigns and improve campaign performance.

- Watch campaigns run in real time on Performance Outbound Campaigns dashboards. Monitor connect rates, abandoned calls, and the progress of each running campaign. Select a campaign on the [Campaigns dashboard page](#) and observe the number of idle agents, the abandon rates compared with target rates, number of calls blocked by Do Not Call lists etc. The [Outbound campaign details view](#) shows campaign statistics, wrap-up call details, live or historical interactions, and scheduled interactions for a campaign.
- See detailed information on agent metrics to improve the performance of outbound campaigns. View a list of outbound campaign interactions specific to an agent in [Agents Interactions Detail view](#), and monitor successfully completed sales in [Agents wrap-up Detail view](#).
- View in-progress and completed interactions associated with outbound campaigns in [Interactions view](#). This view displays interactions associated with multiple campaigns and outbound interactions associated with selected contact lists.
- See [Queues Interactions Detail view](#), in Performance Queues, for in-progress and completed interactions associated with outbound campaigns for specific queues and selected contact lists.

#### Historical Reporting

To improve performance of outbound campaigns, use Genesys Cloud CX reports to see past metrics and data for your dialer campaigns.

- The [Dialer Campaign Detailed Attempts History report](#) displays outbound interaction attempts for one or more campaigns during a specific date and time range. It contains information such as caller ID number and name, the total amount of time spent on wrap-up for the interaction, and the amount of time between the customer answering the call and the call transferring into an outbound flow.
- The [Dialer Campaign Success Results by Interval report](#) includes totals for the interval, by day, for the number of dials, contacts, and abandons for the campaign. If a report includes more than one dialer campaign, the report aggregates the totals for all the campaigns. The report includes the percentage of: contacts compared with the calls placed, abandoned calls compared with the calls placed, and abandoned calls compared with the number of contacts.

- The **Dialer Campaign Success Results by Day report** displays a daily breakdown of the results for one or more dialer campaigns during a specific date range. The report includes weekly and monthly totals for the number of dials, contacts, and abandons for the campaign. The report includes the percentage of: contacts compared with the calls placed, abandoned calls compared with the calls placed, and abandoned calls compared with the number of contacts.

## 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	<b>Inbound</b> <ul style="list-style-type: none"> <li>• Genesys Personalized Routing with Callback (CE43)</li> </ul>	None

### Customer Responsibilities

- The customer provides Genesys with the contact list from their own CRM, marketing, or collections database. This contact list can be either a flat file or an on-demand trickle-feed that applies the Genesys Cloud CX REST API. Note: development work to write against the API is not included as part of this use case.
- The customer is responsible for recording and providing any required announcements and recordings[LF1].
- The customer handles compliance as follows:
  - The customer has acquired the proper level of express opt-in consent from its contacts to receive Sales and Marketing calls and automated messages.
  - The customer maintains an auditable list and honors opt-out requests.
  - The contact lists that are loaded into Genesys Cloud CX contain only customers to whom calls can be made according to the corresponding local compliance rules.
- The outbound solution can be configured based on the customer's understanding and direction of compliance with local outbound calling regulations at the site of the installation. The customer is responsible for compliance with laws and regulations regarding outbound calling and automatic dialing. It is recommended that the customer's legal department confirms that the organization is in full compliance with these regulations.

---

## Related Documentation

---

### Document Version

- Version **V 1.1.3** last updated **February 29, 2024**