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Genesys Cloud CX Use Cases

Genesys SMS & Email Notifications (CE12) for Genesys Cloud

9/18/2024

Use SMS and email to send personalized, timely and relevant notifications to customers.

What's the challenge?

Companies want a quick way to engage with their customers to notify them of appointment reminders, delivery notifications, fraud alerts, coupons, loyalty program information, surveys and much more. Repeated handling of unnecessary outbound calls and preventable inbound follow-up drives up costs and can damage customer and employee satisfaction.

What's the solution?

Communicate important information simply and efficiently using Genesys SMS / Email Notifications. Customers experience a more satisfying and engaging experience with businesses. And companies reduce operational costs while ensuring important and time-sensitive digital alerts are delivered to customers wherever they are.

Other offerings:

Genesys Engage on-premises

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Use Case Overview

Story and Business Context

Consumers want businesses to send them proactive notifications when that information is personalized, timely, and relevant. Automated notifications are an efficient, quick way to notify customers of appointment reminders, delivery notifications, fraud alerts, coupons, loyalty program information, surveys, and much more. Many companies struggle with adding the SMS channel to their outbound notification strategy for marketing, care, or collections. This use case offers the ability to configure and execute outbound SMS / Email campaigns.

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, close rates, cross-sells, and up-sell rates improve through the ability to automatically generate outbound messages and empower agents with a single searchable desktop application that shows customer context.
Improved Customer Experience	Improve Net Promoter Score (NPS) by proactively notifying customers through SMS and email interactions.
Improved Employee Occupancy	Reduce agent-assisted outbound calls by automatically sending communications through SMS and email.
Reduced Volume of Interactions	Decrease inbound interactions by proactively sending communications through SMS and email.

Summary

This use case illustrates how companies proactively send customers notifications using SMS or email for marketing, care, or collections purposes. The company can use its marketing, CRM, or collections system to generate contact lists to generate an SMS or email campaign. The lists can include the appropriate contact details, such as contact name, mobile phone number, email address and contact reason. The system records delivery results to feed into reports. Public APIs are useful to send a message based on a one-time event, recurring events, or trigger-based events without needing to build and maintain a traditional "blast" campaign.

Outbound SMS / Email notification examples include:

Financial Services	Telecom	Healthcare	Utilities
<ul style="list-style-type: none"> • New customer engagement • Replenish prepaid card reminders • Payment reminders • Fraud alerts 	<ul style="list-style-type: none"> • Going over plan alerts • Payment reminders • Upgrade eligibility • Customer win -back 	<ul style="list-style-type: none"> • Appointment reminders • Wellness updates • Refill prescriptions • Claim status updates 	<ul style="list-style-type: none"> • Service call confirmation • Planned downtime • Outage status • Payment reminders
Retail	Insurance	Collection Agencies	Travel and Hospitality
<ul style="list-style-type: none"> • Promotional Messaging • Order confirmations • Product recalls • Loyalty program activity 	<ul style="list-style-type: none"> • Quote follow-up • Payment reminders • Claims status updates • Renewal notice 	<ul style="list-style-type: none"> • Payment reminders • Late payment alterations • Payment confirmations 	<ul style="list-style-type: none"> • Booking confirmation • Upselling service • Payment reminders • Travel updates • Loyalty program activity

Use Case Definition

Business Flow

(1) Trigger-based SMS / Email

Business Flow

(2) Campaign-Based SMS

Business Flow

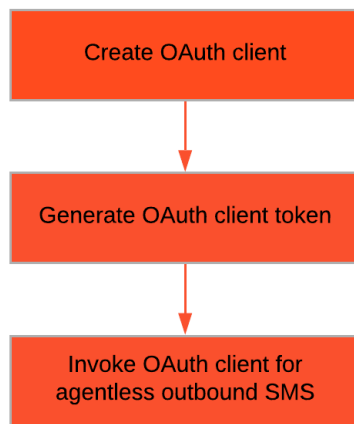
(3) Campaign-Based Email

Business and Distribution Logic

Business Logic

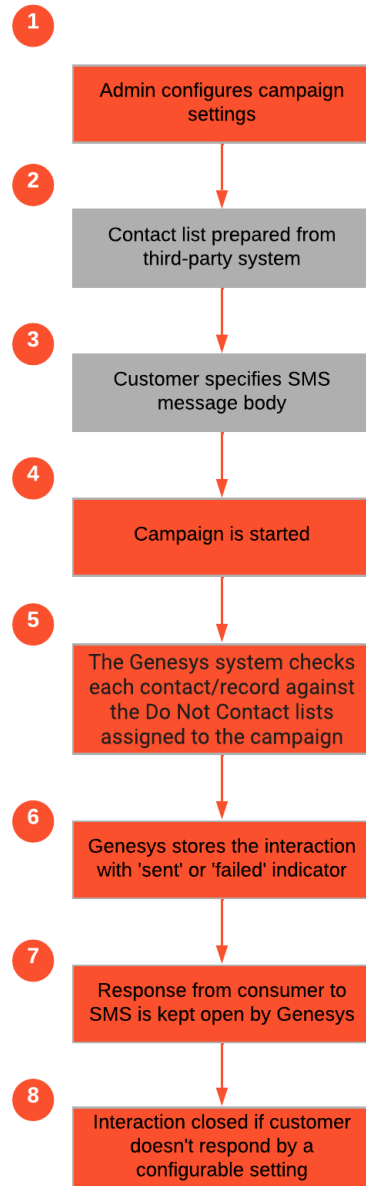
Agentless SMS and Email Notifications

Customers typically use agentless SMS / Email notifications when triggering a message based on an event such as: purchase, scheduled appointment, two factor authorization, and so on. The customer must have an external system invoking the API call to send the message. These trigger-based



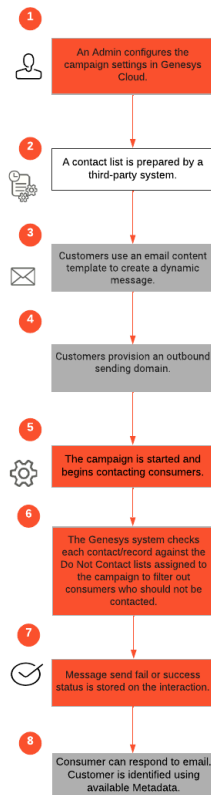
Business Flow Description

1. Create or use an existing OAuth client.
 - Customers will need an OAuth client with the appropriate permission assigned to the OAuth client. See [link](#) for more info.
2. Generate an OAuth client token
 - To call the endpoint to send agentless notifications, customers need to use an OAuth client to **generate a token**. They need to make sure to build the basePath for the correct Genesys Cloud region they are working in. For more information, see [link](#).
3. Use the OAuth client token to call the agentless outbound endpoint. For more information reference the [agentless SMS tutorial](#).



Business Flow Description

1. An Admin configures the campaign settings in Genesys Cloud.
2. The organization either prepares a contact list from a third-party system (such as CRM or Collections) or configures their system to use Genesys REST API to insert contact records.
 - Batch Upload Option: Customer contacts are loaded through the User Interface using a .csv file.
 - API Upload Option: Customer contacts are loaded through a Genesys Cloud CX API call. Customers can set a flag in the API to add the contact to the top of the list.
3. Customers can use a message content template to create a dynamic message using data from the contact list. Alternatively, The customer can specify the SMS message body for each contact record by assigning a column in the list as the message column. Best practice recommends that if hyperlinks are used in the message body that the total message content is no greater than 160 characters to avoid splitting the hyperlink across multiple text messages. The consumer's mobile phone provider determines the concatenation of an long message. Messages longer than 160 characters may be concatenated into one message by the mobile provider or may arrive as multiple messages.
4. The campaign is started and begins contacting consumers based on the settings configured in the first step.
5. The Genesys system checks each contact/record against the Do Not Contact lists assigned to the campaign to filter out consumers who should not be contacted.
6. Message send fail or success status is stored on the interaction.
7. Consumer may decide to respond to the SMS message. Responses will thread with the original outbound SMS message for a configured amount of time with the available metadata from the SMS message to identify the consumer.



- For a HELP keyword, a customer-specified help text is sent to the consumer.
- For a STOP keyword, a default or customer-specified text is sent to the consumer, and the mobile number is added to a suppression list by the aggregator so further messages are blocked by the aggregator.
- For a START or UNSTOP keyword, the aggregator begins allowing further messages to the consumer.

8. Interaction closed if customer doesn't respond by a configurable setting.

Business Flow Description

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 - Batch Upload Option: Customer contacts are loaded through the User Interface using a .csv file.
 - API Upload Option: Customer contacts are loaded through a Genesys Cloud CX API call. Customers can set a flag in the API to add the contact to the top of the list.
3. Customers use an email content template to create a dynamic message using data from the contact list.
4. Customers provision an outbound sending domain to be used on behalf of the campaign.
5. The campaign is started and begins contacting consumers based on the settings configured in the first step.
6. The Genesys system checks each contact/record against the Do Not Contact lists assigned to the campaign to filter out consumers who should not be contacted.
7. Message send fail or success status is

notifications are not sent all at once. As such, trigger-

based notifications do not use traditional outbound campaigns. However, they are included within interaction views and reporting.

Standard SMS Keywords

Standard opt-out keywords include STOP and UNSUBSCRIBE and additional variations including: END, QUIT, CANCEL and STOPALL

Standard help keywords include HELP and INFO.

Standard opt-in keywords include START, YES and UNSTOP.

SMS Campaigns

Contact List

- The organization either prepares a contact list from a third-party system (such as CRM) or configures their system to use Genesys Cloud CX APIs to insert contact records.
- Batch Upload Option: Customer contacts are loaded through the User Interface using a .csv file.
- API Upload Option: Customer contacts are loaded through a Genesys Cloud CX API call. Customers can set a flag in the API to add the contact to the top of the list.

Campaign

- The campaign is started and begins contacting consumers based on the campaign settings configured. The Genesys Cloud CX system checks each contact record against the Do Not Contact list(s) assigned to the campaign to filter out consumers who should not be contacted. The message body can be specified in a SMS campaign templated associated with the campaign. Alternatively, the customer can specify the SMS message body for each contact record by assigning a column in the list as the message column. Best practice recommends that if hyperlinks are used in the message that the total message content is no more than 160 characters to avoid splitting the hyperlink across multiple text messages.
- The consumer's mobile phone provider determines the concatenation of a long message. Messages longer than 160 characters may be concatenated into one message by the mobile provider or may arrive as multiple messages. Genesys stores the SMS sent success or failure status of a message on the interaction. Consumer may decide to respond to the SMS message. Responses will thread with the original outbound SMS message for a configured amount of time with the available metadata from the SMS message to identify the consumer. For a HELP keyword, a customer-specified help text is sent to the consumer. For a STOP keyword, a default or customer-specified text is sent to the consumer, the mobile number is added to a suppression list by the aggregator, and further messages are blocked by the aggregator. For a START or UNSTOP keyword, the aggregator begins allowing further messages to be sent to the consumer.

Email Campaigns

Contact List

- The organization either prepares a contact list from a third-party system (such as CRM) or configures their system to use Genesys Cloud CX APIs to insert contact records.

stored on the interaction.

8. Consumer may decide to respond to the email. Responses will thread with the original outbound email for a configured amount of time with the available metadata from the email to identify the consumer.

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- Batch Upload Option: Customer contacts are loaded through the User Interface using a .csv file.
 - API Upload Option: Customer contacts are loaded through a Genesys Cloud CX API call. Customers can set a flag in the API to add the contact to the top of the list.

Campaign

- The message body can be specified in an email campaign template associated with the campaign.
- The outbound domain used for sending messages is provisioned in Genesys Cloud.
- The campaign is started and begins contacting consumers based on the campaign settings configured.
- The Genesys Cloud CX system checks each contact record against the Do Not Contact list(s) assigned to the campaign to filter out consumers who should not be contacted.

Distribution Logic

There is no applicable content for this section.

User Interface & Reporting

Agent UI

N/A

Reporting

Real-time Reporting

Live messaging campaign information can be found on the Messaging Campaigns tab on the Campaign Management dashboard.

- Campaigns can be turned on/off
- Campaign progress is shown with the number of total contacts and the number of processed contacts
- Campaign attributes such as name, contact list, and division are also provided

Historical Reporting

Dialer Campaign Detailed Attempt History can be used to display the individual:

- Number of SMS attempts
- DateTime of SMS attempt
- Campaign and queue
- Contact ID

- Number of SMS messages rejected by the aggregator
- Number of SMS messages accepted by the aggregator

Further information about campaign results can be found by exporting the contact list such as:

- Records skipped, for example, the contact is listed on a "do not contact list" assigned to a campaign

Customers can have ultimate flexibility by using the Interactions View to show detailed results of a campaign, including applying filters and choosing data columns, and also export as .csv or .pdf.

Note: This view is the only method available to see details when using the agentless API method of sending SMS messages.

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	None	None

General Assumptions

- The customer cannot use a third-party SMS / email aggregator.
- Our aggregator stores opt-out requests and blocks messages if a customer attempts to send them to a consumer. This is accomplished by the consumer using keywords such as STOP, STOPALL, UNSUBSCRIBE, CANCEL, END, or QUIT. If the consumer wants to resume messages (opt-in), they can use keywords such as START, YES, and UNSTOP. Genesys also supports custom keywords for opt-in and opt-out requests.
- For SMS campaigns, customers must acquire a short code in North America.

Customer Responsibilities

- Customer provides Genesys with the contact list from their own CRM, marketing, or collections database - either via uploading a .csv file in the user interface or using API endpoints to add contacts to a contact list.
- Compliance is handled by the customer. The customer has the responsibility for securing express consent from consumers (when required) before sending SMS messages, maintains an auditable list, and honors opt-out requests. The contact lists loaded into Genesys should contain only consumers to whom and when an SMS message can be sent according to the corresponding local compliance rules.

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- The outbound solution is configured based on the customer's understanding and direction of compliance with local outbound SMS regulations at the site of installation as well as at the local regulations at the site of delivery of SMS messages. The customer is responsible for compliance with laws and regulations concerning outbound SMS and automatic sending of SMS. It is recommended that the customer's legal department assert that the organization is in full compliance with these regulations as SMS messages are sometimes considered the same as voice calls with regard to compliance.
 - The sender number (dedicated short code or long code) is provisioned on the Genesys system.
 - MMS is not included in the scope of this use case.
 - For email campaigns, customers must provision an outbound domain in Genesys Cloud for sending emails on behalf of the campaign

Document Version

- Version **1.0.0** last updated **September 18, 2024**