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Genesys Cloud CX Use Cases

Genesys Email Routing (CE16) for Genesys Cloud

11/30/2023

Route email interactions to the best skilled resource

What's the challenge?

When customers take the time to send an email, they expect a quick, personalized response. But as the volume of email interactions increases, you struggle to provide timely and helpful responses. Trust in email as a reliable communication channel is declining among your customers and employees.

What's the solution?

Automatically distribute emails to the best-fit agent based on content analysis and keywords. Genesys Email Routing streamlines your response process using email automation functionality that enables you to monitor, measure, and optimize your email flow to create a better customer experience.

[Link to video](#)

Other offerings:

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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 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

Email is still one of the most reliable and desired ways for customers to interact with companies for support. It is an essential avenue for companies to serve and engage with customers while providing a consistent and positive customer experience. Genesys can improve handle time, first contact resolution, agent utilization, and customer satisfaction by automatically distributing emails to the best available agent based on content analysis and keywords, systemizing automatic acknowledgment, and automating responses.

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 Customer Experience	Addressing customers requests in a timely manner through skills-based routing improves Net Promoter Score
Improved Employee Utilization	Blending email with voice and chat allows agents to make better use of downtime between calls and chats to improve employee occupancy.
Improved First Contact Resolution	Direct interactions to an expert through skills based routing improves First Contact Resolution
Reduced Handle Time	Standard response libraries improve consistency and reduce the time taken to compose responses to email inquiries. Automatic linking of emails to previous correspondence reduces familiarization and handling time for agents.

Summary

A customer sends an email to a company email address. Genesys Cloud CX receives the email and triggers an inbound email flow. The inbound email's flow can automatically reply to the customer to set expectations, or the flow can search basic keywords determine the correct routing. Genesys Cloud CX routes the email to the queue that corresponds to the email's "to" address and the matching keywords. The email is then distributed to the best available agent based on the required skills. When an agent receives the email, the agent sends an email reply to the customer. Genesys Cloud CX tracks subsequent replies from the customer as part of the same conversation, assuming they come within a few days. In this way, Genesys Cloud CX routes the replies to the same agent.

Organizations can configure ACD so that phone conversations can interrupt email conversations. This approach allows agents to maintain and hit service levels goals for voice while working on email during slower periods.

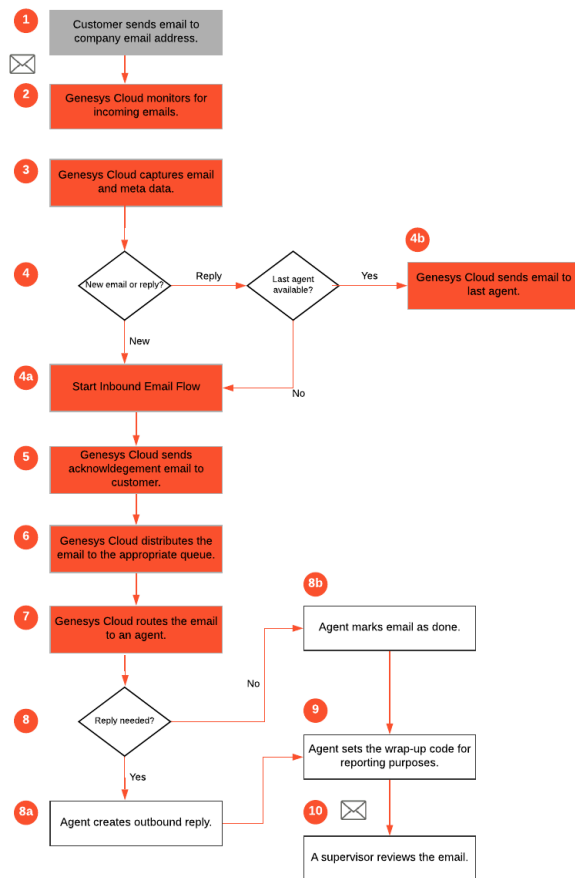
Organizations can also optionally enhance Genesys Cloud CX so that a supervisor or quality evaluator

can review outgoing emails from agents. This enhancement provides management visibility into the email interaction channel and enables further process improvements.

Use Case Definition

Business Flow

This flow describes the use case from the perspective of the main actors. For example, the customer and the contact center agent.



Business Flow Description

1. A customer sends an email to the email address in a registered domain (for example, orders@abc.org) that is configured in the Genesys Cloud CX solution.
2. Emails are delivered to Genesys Cloud CX via forwarding to a predefined email address, or via direct DNS routing with configured MX records.
3. Genesys Cloud CX captures the new email and identifies "From," "To," "Reply-To," "Subject," and "Body" as meta data.
4. Genesys Cloud CX determines whether the email is a new email or a reply email.
 1. If it is a new email, the system starts a new inbound email flow.
 2. If it is a reply email from a customer, the Genesys Cloud CX attempts to route the email to the agent who previously assisted the customer, if available. If that agent is not available, Genesys Cloud CX starts the inbound email flow.
5. Optional: The system sends a receipt acknowledgement email to the customer with a predefined template for the "To" address.
6. Genesys Cloud CX determines the requested skills and transfers the conversation to a queue that can provide those skills.
7. When an agent with the requested skills is

available, Genesys Cloud CX routes the email to the appropriate agent. The agent's interface displays all relevant information about the email.

8. When the agent reads the email, the agent decides if a reply is needed.
 1. If a reply is needed, the agent creates an outbound reply email. The agent can optionally use a standard response template.
 2. If not, the agent marks the e-mail as done.
9. The agent sets a wrap-up code to mark the business outcome for reporting purposes.
10. Optional: A supervisor reviews the email.

Business and Distribution Logic

Business Logic

In the logical flows in the previous sections, there are various process steps driven by configuration parameters and additional business logic within the system. These parameters and the underlying logic are described in this section.

Capturing of Incoming Emails

In step 2 of the business flow, emails are delivered to Genesys Cloud CX. The following configuration options are available:

- Direct customer-sent email messages to the yourAccountName.myGenesys Cloud CX.com domain.
- Register the business domain with Genesys Cloud CX for email routing (MX Records)
- Forward existing email addresses from corporate email platform to Genesys Cloud CX.

Note: Genesys Cloud CX does not allow an organization to use their own email platform. However, an organization could forward email from their corporate mail platform to an email address that is registered with Genesys Cloud CX. The downside of this approach is that the email responses from the agent to the customer include a different email address in the email header. However, the email address in the Reply To field is correct.

Quality Management

Email interactions are available for Quality Management just like all other media types.

Distribution Logic

1. Genesys Cloud CX checks if the email is a reply email that belongs to an existing conversation.
2. If so, Genesys Cloud CX tries to route the email to the agent who last handled the conversation. If that agent is not available, Genesys Cloud CX starts the email flow and handles the email based on the email flow configuration.

Additional Distribution Functionality

The additional distribution logic is:

- Re-route on no answer (RONA)-functionality: If an agent does not accept the email interaction, the email interaction is automatically put back into the queue after a timeout. The agent is set to Not Responding.
- Conversations can include emails and other media types.
- An organization can configure email interactions to be interrupted by other media types.
- An organization can set the starting priority.
- An organization can configure how Genesys Cloud CX removes skill requirements to expand the possible agent pool.

Automatic Replies

In step 5, the Genesys Cloud CX system checks for automatic/system replies from the mail server to automatically stop email processing when no agent intervention is needed. To prevent “pingpong” emails between mail servers, Genesys Cloud CX detects automated answers, such as auto-responses and auto-acknowledges. For example, it detects Out of the Office responses.

Standard Responses

The agent can use canned responses to create email responses. Each organization creates and manages their own canned responses.

Available Parameters Available for Configuration by Customer

The following configurable parameters are used for the distribution logic:

- Skill/skill level
- Overflow timeouts for skill-based routing. These timeouts are based on the age of the interaction.
- Starting priority

An organization can configure the following parameter by the "to" Email Address (for example, Sales, Jobs, or Support) or by specific keywords:

- Auto-acknowledge message
- Skill selection
- Transfer to specific queue

User Interface & Reporting

Agent UI

The following lists the minimum requirements for the agent desktop:

- Configuration of disposition codes (Cross Sell, Need Follow Up, Not Right Skill, Processed, Terminated, Transferred, Up Sell)
- Configuration of and access to standard response library
- Agent-to-Agent transfer
- Agent-to-Queue transfer
- Review functionality for supervisors

Reporting

Real-time Reporting

Use Genesys Cloud CX Performance views and dashboards for real-time reporting on email routing. Analyze email routing metrics and data to better manage and plan agent time and queue email routing.

The [Agents Performance Summary View](#) displays current and historical metrics and data about agent email interactions for the number of ACD emails routed to an agent, the total number of emails handled by an agent, emails that were transferred by an agent, and the total amount of time the agent spent handling email, for a time period. The data in this view and the [Agents Performance Detail View](#) can help with improving your routing of emails to agents.

The [Queues Performance Summary View](#) and the [Queues Performance Detail View](#) display current and past metrics and data for queues that receive email. A queue configured to receive ACD routed emails displays the number of emails routed to a queue for agents, the average amount of time an email waited in a queue before an agent answered it, the number of email interactions handled by agents in the queue, emails handled by an agent in a queue and then transferred, and the total time and average time agents spent handling emails in the queue, for a time period. The data in these views can help in improving your routing of emails to queues.

View in-progress and completed inbound email interactions in [Interactions View](#). This view displays metrics and data for email interactions, including the language of the email, matching skills for the agent in the queue, and the number of emails sent by an agent including Reply All and Forward. Understanding this data can create a better customer experience with improved routing of emails.

Search for the media type emails in the [Skills Performance View](#) to see statistics based on the skills and languages for interactions as they enter a queue. These statistics can help supervisors determine performance issues with a specific skill in one or multiple queues. The statistics can also help supervisors evaluate the effectiveness of their evaluation and routing methods.

Historical Reporting

Run the [Interactions Details Report](#) for insights into email interactions. This report includes details on how long the email remained in a queue, the agent who handled the email, and the total duration to

handle and wrap up the email interaction. Use this report to identify if email handle time is taking longer than average, to improve managing and planning for agent and queue email routing.

View the [Queue Wrap-up Summary Report](#) to see the wrap-up codes that agents, grouped by queues, used most frequently. This helps to identify the email interactions on which agents spent most of their time. Analyzing the total number of emails and their duration, by queue, assists you in balancing the volume of email interactions, improving email routing. Better routing provides quicker responses to customer emails for faster resolution.

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

Customer Responsibilities

An organization must configure the following things for Genesys Cloud CX to receive emails:

- Use method to direct customer-sent email messages to the yourAccountName.myGenesys Cloud CX.com domain.
- Register the business domain with Genesys Cloud CX for email routing (MX Records).
- Forward existing email addresses from corporate email platform to Genesys Cloud CX.

An organization must do the following things in order for Genesys Cloud CX to access requested emails:

- Provide the subdomain
- Configure MX records appropriately

Other assumptions include:

- Genesys Cloud CX's email environment uses AWS spam verdict to detect spam. An organization has no control over the Genesys Cloud CX spam settings.
- Text input must be available in UTF-8.
- Architect provides basic text screening which allows a business to identify the presence of particular

strings in the subject, body, or both.

Related Documentation

Document Version

- Version **V 1.1.1** last updated **December 1, 2023**