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Genesys Cloud CX Use Cases

Genesys SMS Routing (CE29) for Genesys Cloud

10/19/2024

Route SMS interactions to the best resource

What's the challenge?

Your customer wants to contact you in the same way they would friends and family — instantly, conveniently, and personally, with freedom to keep moving. If they encounter constraints, excessive hold times, inconsistent responses or multiple calls, that can damage customer satisfaction and put a strain on your agents.

What's the solution?

Connect a customer to the right resource anywhere in your business by routing customer text messages to your best-fit agents. Genesys SMS Routing uses skill-based routing so messaging your company for support is faster and more efficient than calling and enables conversations from anywhere.

[Link to video](#)

Other offerings:

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Use Case Overview

Story and Business Context

In today's digital world, customers want a simple, convenient method of communication through their preferred channel at a time that meets their schedule. More often, customers choose asynchronous channels, such as SMS, for the convenience it provides. Using SMS, customers can avoid calling and waiting on hold for an available agent. SMS also allows customers to engage "on the go" without a dedicated mobile app. Also, because customers engage by SMS at faster rates than any other messaging channel, the organization can resolve issues more quickly.

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 Employee Utilization	Combine text messaging with automated responses to boost agent productivity.
Reduced Handle Time	Routing of SMS messages to the right skilled agents through skills-based routing. Defer work to a later time when traffic volumes are not as significant.
Reduced Transfers	SMS interactions captured by the Genesys system go through content analysis to assign a category that allows the best agent with the skills to the corresponding category. The result is correct transfer of SMS and avoidance of misrouted SMS and unnecessary costs.

Summary

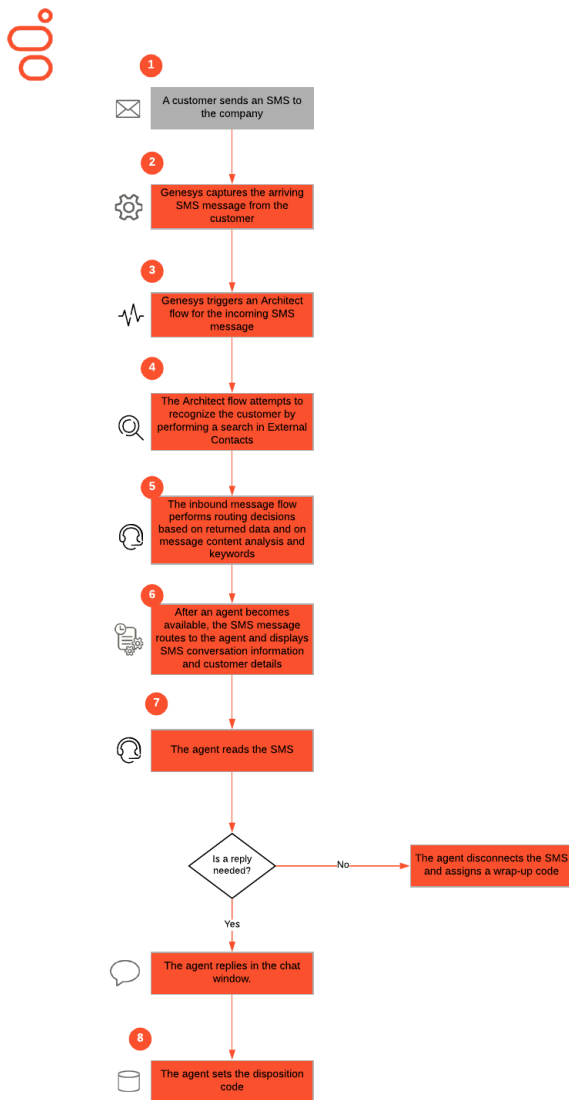
A customer sends an SMS message to a company. The Genesys system receives the SMS message and routes it to the appropriate messaging flow for processing. The messaging flow allows customer to potentially perform a data dip that enriches the available data about the SMS conversation. Based on decisions made in the flow, the system eventually transfers that data to a queue. The system then queues the SMS message to the best available agent who has the skills that correspond with the skills requested in the flow. When an agent becomes available, the system routes the conversation to the agent by ACD, just like any other media type. The agent answers the message, reviews the message contents, and replies from within the Genesys Cloud CX interface. The agent can keep the message open and use SMS like a chat channel, or close the SMS message after replying. If the agent keeps the conversation open, the system immediately displays each customer response to the agent, using SMS messages as a chat channel. If the agent closes the conversation but the customer replies within 72 hours, the conversation reopens (after 72 hours, the system creates a new conversation) and routes to the last agent that handled the SMS. If that agent is unavailable, the system routes the message by ACD to the next available agent. After the conversation ends, it may pass to a Quality Evaluator, who scores the conversation. As part of the SMS messaging channels, supervisors can

view SMS traffic in all the analytics dynamic views.

Use Case Definition

Business Flow

The following flow describes the use case from the perspective of the main actors, that is user and contact center agent.



Business Flow Description

1. A customer sends an SMS to a company long code, toll-free number, or short code. Reference [Resource Center](#) for more information regarding SMS and supported countries.
2. Genesys Cloud CX receives the SMS message, including the customer's phone number as metadata.
3. Genesys triggers an Architect inbound message flow for the incoming SMS message.
4. The Architect flow attempts to recognize the customer by performing a search in External Contacts or external data source (optional).
5. The inbound message flow performs routing decisions based on the data returned from External Contacts (or External Data source as an option) and also based on message content analysis and keywords.
6. When an agent within the queue is available, the SMS message routes to the agent. A screen pop displays related SMS information. Relevant conversation information appears in the agent script. The agent receives full context of the SMS conversation.
7. The agent reads the SMS message and determines if a reply is necessary.
 1. If reply is not necessary, the agent disconnects the SMS and assigns a wrap-up code that indicates a response is not necessary.

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2. If a reply is necessary, the agent replies in the chat window, potentially using a standard response template.
 3. If they expect the customer to respond quickly, the agent can leave the conversation open. If not, they can close the conversation.
 8. When the conversation closes, the agent sets a disposition code to mark the business outcome for reporting purposes after the interaction disconnects.

Business and Distribution Logic

Business Logic

There is no applicable content for this section.

Distribution Logic

There is no applicable content for this section.

User Interface & Reporting

Agent UI

- Standard Genesys Cloud CX user interface.
- Access to response library.
- Admin and Architect access to provision and configure SMS numbers and flows.

Reporting

Real-time Reporting

Genesys Cloud CX comes with a set of real-time dashboards, views, and reports. These views and reports work across all channels including messaging, which also shows all SMS messages. This feature enables supervisors to gain insight on the SMS traffic that the system handles. The following list outlines some of the key views available to exposed analytics data:

- Interactions: A detailed view that provides information related to each conversation and shows every step along the way for an SMS message.
- Queue Activity: Real-time view of the conversations waiting in queue.
- Queue Performance: Queue Metrics specific to SMS volume, including the ability to get insight into SL, Handle Time, ACW, and other key metrics specific to SMS.

- **Agent Performance:** Specific metrics around agents, including Handle Time, number of SMS conversations, and more.
- **Wrap-Up Performance:** Detailed insight into selected wrap-up codes.
- **Skills Performance:** Detailed insight and metrics specific to skills-based routing.
- **Several Canned Reports:** Set of canned reports specific to the various needs from contact centers and specific to messaging.

Genesys Cloud CX continuously releases new capabilities. For additional information and details on newly released analytics features, see the release notes on the Resource Center at help.mypurecloud.com.

Historical Reporting

See Above.

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

Each Genesys DC must purchase an SMS server to serve as the reverse proxy server for cloud customers.

Customer Responsibilities

- Customer secures and provisions a dedicated long code or text-enabled toll-free number, enabling them to send SMS messages in Genesys Cloud CX.

Related Documentation

Document Version

- Version **V 1.0.0** last updated **October 19, 2024**