Genesys Cloud CX Use Cases

Genesys Messaging (CE34) for Genesys Cloud

4/19/2024

Offer a powerful new way for customers to connect with you directly in Messages

What's the challenge?

To engage customers on their devices, enable seamless experiences, build brands and reduce service and support costs using mobile messaging channels. Pain points include increased customer frustration due to failure of carrying context across channels and rising costs due to increased calls to agents.

What's the solution?

Using Genesys Messaging to support continuous, personalized conversations with integrated agent assistance and persistent history of contact, bringing new levels of scalability, consistency, and responsiveness to messaging interaction strategies

Link to video

Other offerings:

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Contents

Use Case Overview

Story and Business Context

In today's digital world, telephone calls are not always the best or desired way to communicate with businesses. Telephone calls are not visual, and they require a synchronous live interaction. Consumers want a simple, convenient method of communication through the channel of their choice and according to their own schedule. Third-party messaging applications are a popular communication option that consumers have come to expect as a way to interact with companies.

Genesys messaging enables two-way conversations between consumers and businesses on familiar mobile devices. Genesys messaging provides a feature-rich, flexible, and convenient method of answering questions and solving problems all through a single messaging conversation. The long-lived, asynchronous nature of the conversation means that consumers and contact center agents can return to the conversation at any time with a full history.

This use case enables businesses to handle messaging conversations with channels like Genesys Web Messaging, Facebook Messenger, Twitter Direct Message, LINE, and WhatsApp in their Genesys contact center environment. Businesses must apply for approval with WhatsApp and get their use cases approved by WhatsApp to be part of the ecosystem.

To increase successful self-service interactions, a chatbot used over these messaging channels can automate the conversation with the customer. This feature transfers the interaction to a contact center agent seamlessly if needed (outside the scope of this use case). When companies enable supported Genesys Messaging customer service channels within their Genesys environment, benefits can include:

- Improved first contact resolution and reduced handle time by matching every consumer with the agent best equipped to respond through skills-based routing

- Improved NPS by carrying context across channels and matching the consumer with an appropriately skilled agent, similar to how all Genesys channels are managed

- Reduced costs by granting agents the ability to manage multiple messaging conversations simultaneously and blend messaging conversations with other media types in the same agent desktop

- Continuity in asynchronous conversations, enabling consumers to make contact when convenient throughout the day, week, or buying or service journey

- Workforce management and reporting integrated with the rest of the contact center

- Improved brand perception by offering new channels that expect to be heavily promoted

- Convenience for consumers by offering a familiar messaging app as opposed to a separate chat window

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	Carry context across channels and match the consumer with an appropriately skilled agent. Provide continuity in asynchronous conversations by enabling consumers to make contact when convenient throughout the day, week, or buying or service journey. Make it convenient for consumers by using familiar messaging apps as opposed to having to open a separate chat window.
Improved First Contact Resolution	Match every consumer with the agent best equipped to respond through skills-based routing while reducing handle time.
Reduced Administration Costs	Reduce costs by granting agents the ability to manage multiple chat conversations simultaneously and blend messaging conversations with other media types in the same agent desktop.

Summary

A consumer can start a conversation with a business directly in messaging platforms such as Facebook Messenger, Twitter Direct Message, LINE, and WhatsApp. They do so by receiving offers that include messaging apps, links, or account names and phone numbers in customer mobile apps, websites, and promotional materials. Genesys Web Messaging works similarly, with the consumer engaging the business directly through their website or mobile app where Messenger is deployed. These conversations route to a company's contact center through the Genesys Messaging service. A chatbot can automate the conversation (outside the scope of this use case) or a contact center agent can provide human assistance. These engagements become persistent and long-lived (asynchronous), but can be handled live (synchronously) when necessary. During the conversation, the agent can present rich messaging elements. These elements include images, URL links, emojis, and stickers. This feature makes it convenient for the consumer to resolve an issue, receive an answer to a question, or complete a transaction (such capabilities vary by channel).
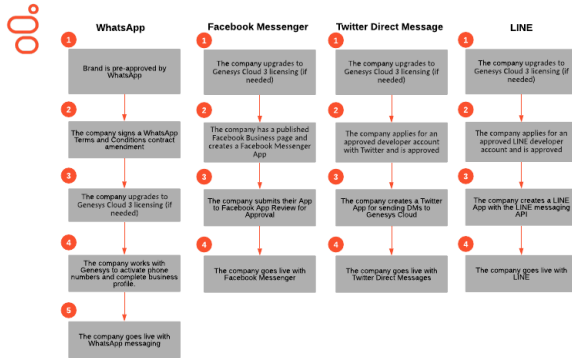
Use Case Definition

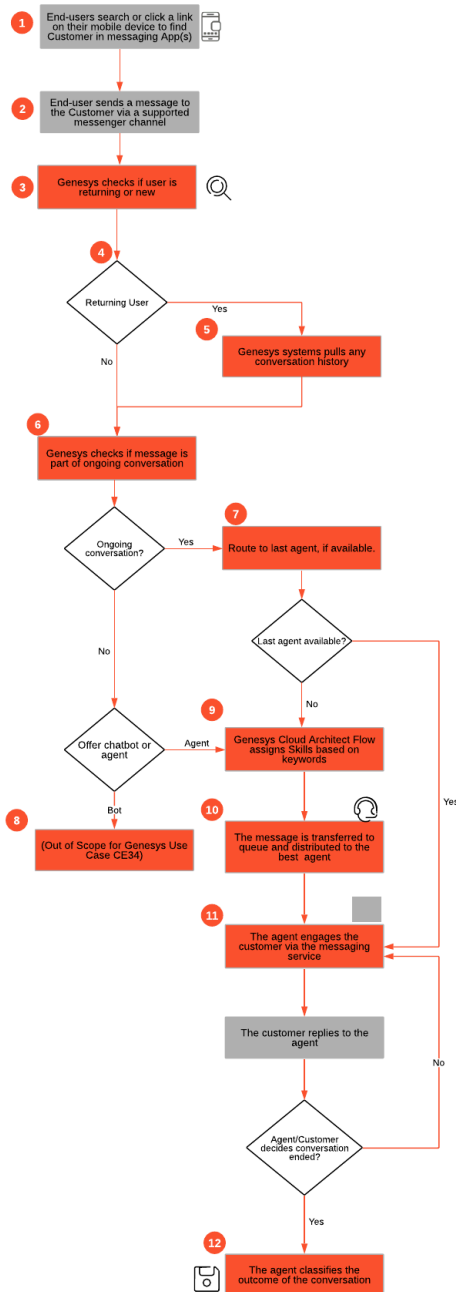## Business Flow

Approval Flow

Business Flow

Messaging Flow

Business Flow Description

- WhatsApp

  - If the brand was approved by WhatsApp, they can engage with us to get on-boarded to Genesys. We can help with pre-approvals, but a brand should not assume they are pre-approved, because they expressed interest with us, or purchased Genesys Messaging for WhatsApp from us.

  - The customer can go live with Genesys Messaging for WhatsApp. While in beta, WhatsApp may want to check out the company's implementation before allowing them to go live.

  - WhatsApp tracks a quality score which determines how many unique customers a business may contact per day (1000, 10,000, or up to 100,000). A decrease in quality score may temporarily reduce the number of customers the business may contact.

  - Repeated violations of WhatsApp Terms of Service or persistent low-quality scores may disqualify a business from using the WhatsApp platform.

Business Flow Description

1. Company invites the customer to initiate a conversation via messaging e.g. via a custom Click to Action button in their app, on their website, or in an email or promotional materials.

2. The customer clicks the message icon and sends an initial message to begin the conversation.

3. The Genesys system checks to see if it can recognize the customer.

4. For brand new interactions, Genesys Web Messaging, Facebook, Twitter, and LINE pass platform-specific unique IDs; the end customer must volunteer additional information for identity matching. WhatsApp passes the phone number of the customer to help identify who initiated the conversation.

5. For customers who have initiated a conversation previously, the system pulls the conversation history and presents it to the agent.

6. The Genesys system determines if the message is part of an ongoing conversation by checking if a message from the same user was received within the last 72 hours.

7. If the message is part of an ongoing conversation, it is routed to the last agent if they are available.

8. If the message is not part of an ongoing conversation, it may be routed to a Bot (outside the scope of this use case), or

9. If the message is not part of an ongoing conversation, the message may be processed by a Genesys Cloud CX Architect Flow and assigned required skills based on keywords.

10. The message is transferred by skills-based ACD to an Agent queue.

11. When routed to an agent, the customer and agent begin a conversation. Depending on the conversation topic, the agent can send the customer messages including text, emojis, stickers, URLs, and images.

12. Customer and agent interact via messaging service and after conversation is complete,

Business and Distribution Logic

agent dispositions the interaction.

Business Logic

Users should never receive unsolicited messages and must have control over the conversation.

Important:

- Genesys Web Messaging

  - Conversations will be threaded until a maximum period of 72 hours of inactivity is reached. If an agent wraps up an interaction and there is no further activity within the 72-hour period, the conversation session will be terminated and the consumer will see a brand new session when they revisit the Messenger. This 72-hour threading window can be configured to be less than 72 hours if desired, however the customer's view of the conversation in Messenger will always be based on the 72 hours of inactivity.

- Facebook Messenger

  - Businesses using the Facebook Messenger platform have up to 24 hours to respond to a message sent by a person in Messenger when using standard messaging. A bot may also send **one** additional message after the 24-hour time limit has expired. The 24-hour limit is refreshed each time a person responds to a business through one of the eligible actions listed in Messenger Conversation Entry Points. This limit is commonly referred to as the '24 + 1 policy'.

  - Customers must agree to and comply with the Facebook Messenger Platform Policy Overview.

- Twitter Direct Message

  - You may not use Twitter for sending bulk, aggressive, high-volume unsolicited replies or Direct Messages; repeatedly sending identical Direct Messages; and repeatedly ending Direct Messages consisting of links shared without commentary, so that this contains the bulk of your Direct Message activity.

  - Customers agree to comply with Twitter Rules and Spam / Platform Manipulation Policies.

- LINE

  - LINE prohibits activities such as sending messages indiscriminately to numerous Users or any other activities deemed to be spamming; activities that use the Service for sales, marketing, advertisement, soliciting or other commercial purposes (except for those purposes approved by LINE); and activities that are related to religious activities or invitations to certain religious groups.

  - Customers agree to comply with the LINE terms/ Terms and Conditions of Use.

- WhatsApp (beta)

  - A brand has 24 hours to respond to a consumer. Within that timeframe, bots and agents are allowed to send as many templated or free-form messages as they want. Any response by the consumer resets that 24-hour limit.

  - Template Message support is a near-term roadmap feature for Genesys Cloud CX. Once the 24-hour limit has expired, only paid WhatsApp-approved Template Messages (called "paid notifications") can be sent until the consumer responds. Once the consumer responds, another 24-hour window opens for agents, bots, and the consumer to communicate.

Distribution Logic

With each conversation:

- For new interactions:
  - Genesys Web Messaging, Facebook, Twitter, and LINE pass platform-specific unique IDs. The end customer must volunteer additional information for identity matching.
  - WhatsApp passes the phone number of the customer to help identify who initiated the conversation.
- For customers who previously initiated a conversation, the system pulls the conversation history and presents it to the agent.

User Interface & Reporting

Agent UI

- Customer history is displayed to the agent upon interaction arrival. Agent can scroll back through previous messages, all the way back to initial interaction.
- Agent can send rich message elements, such as images, emojis, stickers, or URL links depending on the platform.
- Genesys Cloud CX 2 licensing or the Genesys Cloud Digital Upgrade is required for Genesys Web Messaging, Open Messaging, and third-party messaging channels.

Reporting

Real-time Reporting

Use Genesys Cloud CX Performance views and dashboards for real-time reporting on Message interactions. Filter by Media Type to view Message analytics reporting on messaging channels.

The Interactions view displays current and historical metrics and data about Message interactions for the conversation duration of the message, the queue the message was routed to, the agent that handled the message, the skills required for handling the message, a consult transfer, the total handle time, and the wrap-up code, for a time period. The data in this view and the View an interaction's details view can assist you in improving first contact resolution and reducing handle time.

The Agents Performance Summary view displays current and historical metrics and data about agent Message interactions for the number of messages handled, the average number of seconds an agent spent interacting on messages, the total amount of time an agent spent handling messages, the percent of messages transferred, for a period. The data in this view and the Agents Performance Detail view assists you in forecasting Message interactions and scheduling agents.

The Queues Performance Summary view and the Queues Performance Detail view display current and past metrics and data for queues that receive Message interactions. A queue configured to receive Message interactions displays the total number of messages routed to a queue, the average time a message waited in a queue, the number of messages that were abandoned in a queue, the number

of messages transferred by an agent, and the total time and average time agents spent handling messages in the queue, for a time period. The metrics in these views can assist you in balancing and managing agent workload for messaging channels.

View real-time reporting on Message interactions that are in progress and waiting in the My Queues Activity view. The data in this view can help you improve workforce management for messaging.

Historical Reporting

To report on messaging channnels in Genesys Cloud CX Reports, for the Media Type parameter, select Message. The following is an example of running a report for Message interactions.

Run the Interaction Details report for one or more agents during a specific date and time range. The report includes the Message interactions associated with agents, the queue wait time, the duration of the message, and the wrap-up code. In addition to the interaction details, this report assists you in understanding the amount of time agents are spending on Message interactions.

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

Web Messaging

- Customers create a Messenger configuration and deployment, then add the deployment snippet to their web pages where their consumers can interact with the business.

Facebook Messenger

- Customers deploy an approved Facebook Messenger app.

- Businesses sending messages have up to 24 hours to respond to a message sent by a person in Messenger when using standard messaging. A bot may also send one additional message after the 24-hour time limit has expired. The 24-hour limit is refreshed each time a person responds. This limit is commonly referred to as the '24 + 1 policy'.

Twitter Direct Message

- Businesses deploy an approved Twitter Direct Message app.

- Customers agree to the Twitter Rules and Spam Policy as defined by Twitter.

LINE

- Customers deploy an approved LINE app.

- Customers agree to the LINE terms/ Terms and Conditions of Use.

WhatsApp brand can try to channel-switch a consumer by sending them an opt-in message or offering them a Call-to-Action. These interactions count as an opt-in. Examples:

- Click-to-action button on the brand's website

- Link in email signature

- Sending them an SMS with an offer to switch to WhatsApp

- IVR offering to channel-switch to WhatsApp (need to check first whether the customer is on WhatsApp). Within 24 hours after the consumer contacted the brand on WhatsApp, agents or bots can post to the consumer as often as they want.

- Genesys Cloud CX plans to support template messages as a near-term roadmap feature. After 24 hours, regular messages by agents or bots are rejected. Instead, the brand has to send a pre-approved notification message (called Template Messages) and the brand has to pay for the message. Paid messages are billed to Genesys, and Genesys bills the brand on a monthly message based on the rates published by WhatsApp. See WhatsApp Rate Card (rate card) and also WhatsApp's reference for more (guidance) regarding what kind of messages are allowed.

Other Assumptions

End customers must have a supported application version installed as a mobile or desktop application, where applicable, or be logged into the Messaging channel provider's website with a supported web browser.

- Text, Images, Emojis, URL links, and Stickers are supported (support by channel varies)
- Mobile applications

    - Facebook Messenger, Twitter, LINE, and WhatsApp mobile clients are compatible with Genesys Messaging for Genesys Cloud CX, where required platform messaging apps have been approved, configured, and deployed according to the provider's guidelines.

- Website applications

    - Facebook Messenger, Twitter, and WhatsApp web clients are compatible with Genesys Messaging for Genesys Cloud CX, where required platform messaging apps have been approved, configured, and deployed according to the provider's guidelines.

- Desktop applications

    - The LINE desktop client is compatible with Genesys Messaging for Genesys Cloud CX, where required platform messaging apps have been approved, configured, and deployed according to the provider's guidelines.

Customer Responsibilities

WhatsApp

- Until template messages (outbound notifications) are supported, customers acknowledge that they respond to all inbound messages within 24 hours via an Agent, Messaging Flow auto-response, or a chatbot. Customers acknowledge that inbound messages queued for more than 24 hours without a response cannot be responded to.

Related Documentation

Document Version

- Version **1.0.2** last updated **April 20, 2024**