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Genesys Cloud CX Use Cases

Unified Experience from Genesys and ServiceNow (CE48) for Genesys Cloud

Manage real-time communications and process customer data on a single solution with a unified agent workspace

What's the challenge?

Customer experience employees need information and controls to manage real-time communications. They also need to review and process customer data, use business processes, and invoke workflows to service customers. These tools are often in separate systems, forcing workers to split their attention between multiple desktop applications and copy and paste data between them. This is a frustrating and error-prone situation for employees resulting in disappointing experiences for customers.

What's the solution?

A single solution with a unified agent workspace to handle communications and process customer data is the answer. Such a solution avoids overloading staff or forcing them to serve only one type of work at a time. It eliminates the frustration and errors from using multiple desktops for one task. It brings context and customer data into a single UI to streamline processes, creating an overall more efficient agent experience.

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
 - 6.2 Document Version

Use Case Overview

Story and Business Context

Unified Experience from Genesys and ServiceNow brings together real-time communications, case management, and customer data into a single orchestrated experience for customers and employees. Using a single orchestration engine from Genesys, work is delivered to the ideal customer experience employee in a unified, channel-less agent workspace. Agent supporting AI surfaces relevant knowledge and next best actions. Customer data, forms, and workflows sit alongside real-time interaction controls. Comprehensive performance data flows into the workforce engagement management capabilities for accurate forecasts, efficient scheduling, and performance management across all workloads.

Use Case Benefits*

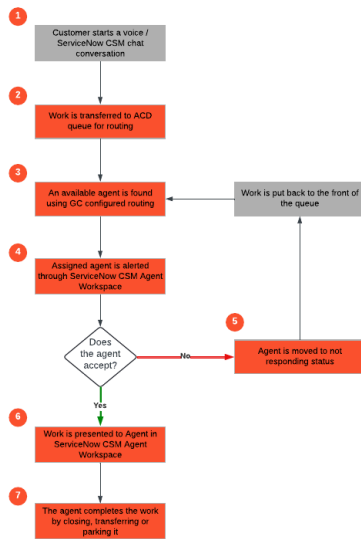
The following benefits are based on benchmark information captured from Genesys customers and may vary based on industry, lines of business or Genesys product line: *Info needed*.

Summary

Unified Experience from Genesys and ServiceNow is a joint solution based on two established leaders in their respective segments. Genesys Cloud, a leading CRM and platform, and ServiceNow Customer Service Management (CSM). Genesys Cloud routes ServiceNow chats and cases, along with all its native communications channels. It delivers work to agents within the ServiceNow CSM Agent Workspace inbox, complete with embedded interaction controls. Agents access their activity dashboard within the agent home of CSM Agent Workspace to browse their schedule, manage their shifts, review their evaluations, take their learning and development courses, and see how they rank with their peers. The result is an efficient, productive, and engaged customer experience center delivering world-class results.

Use Case Definition

Business Flow



Business Flow Description

1. A customer starts a voice conversation, ServiceNow CSM chat conversation, or ServiceNow CSM case.
2. The work is transferred to an ACD queue for routing.
3. Genesys Cloud uses the configured routing to find an available agent.
4. Unified Experience from Genesys and ServiceNow alerts the assigned agent through ServiceNow CSM Agent Workspace.
5. If the agent rejects, they are moved to not-responding and the work is put back to the front of the queue.
6. If accepted, the work is presented to the agent in ServiceNow CSM Agent Workspace with appropriate interaction and work controls.
7. The agent completes the work by closing the work, transferring the work, or parking the work.

Business and Distribution Logic

Business Logic

ServiceNow CSM case and chat queues are configured to use external routing, which uses Genesys Cloud APIs to create work routing requests in the Genesys Cloud orchestration engine. Genesys Cloud processes those requests by using attached data to route through a specified queue with the associated priority and skill requirements. The queue uses its chosen routing algorithm to identify a qualified agent, using a ServiceNow API to assign the work through CSM Agent Workspace.

Agents use CSM Agent Workspace to set their presence. This invokes a Genesys Cloud API to synchronize the user's presence between the systems. When work is delivered, it arrives in their CSM Agent Workspace inbox. Upon accepting, ServiceNow invokes a Genesys Cloud API to accept the work. Interaction controls including hold, mute (for voice), transfer, disconnect, and others are accessed in CSM Agent Workspace, which keeps Genesys Cloud synchronized through its APIs.

Distribution Logic

N/A

User Interface & Reporting

Agent UI

Unified Experience includes native controls for managing user presence, accepting and rejecting assigned work, and handling voice and digital interactions. It includes embedded components for WEM agent activity dashboard, agent copilot, and others. It is part of the ServiceNow CSM Agent Workspace, with all its rich customer data, process, and workflow tools.

Reporting

Real-time Reporting

N/A

Historical Reporting

N/A

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

It is assumed that users are licensed with the appropriate GC1, 2, or 3 tier for the interaction types and WEM features they require. It is also assumed that users are appropriately licensed and configured to access ServiceNow CSM Agent Workspace to use its capabilities.

Customer Responsibilities

Deploy ServiceNow Customer Service Management products on the Now Platform. Run the Now Platform Yokohama version. Install the Unified Experience from Genesys and ServiceNow store application.

Document Version

- Version **V 1.0.0** last updated **September 6, 2025**