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Genesys Cloud CX Use Cases

Quality Assurance and Compliance (WE01) for Genesys Cloud

Improve quality of agent handling of interactions by deriving insights from interaction recording along with recorded desktop activity, quality evaluations, speech & text analytics and post-interaction survey.

What's the challenge?

Contact centers are required to record & retain customer interactions across channels. They also need to record agent desktop activity during interactions to meet compliance requirements and gain insights on Agent performance. Contact centers need an easy to use interface for evaluating the quality of specific interactions and an integrated survey solution to identify opportunities for improvement.

What's the solution?

Genesys Cloud CX records and retains all customer interactions, to meet regulatory requirements. Recording the agent desktop activity provides insight on agent effectiveness in addressing customer needs. Genesys Quality Evaluation includes evaluation forms for use with recorded interactions. Voice transcription enables Speech to text conversion of voice recordings. Post-interaction Survey is built in to the platform. These integrated Quality tools helps improve the Quality of the Contact center.

[Link to video](#)

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Use Case Overview

Story and Business Context

The success of a contact center hinges on its ability to provide a high-quality experience to customers, achieve consistently high levels of quality and meet regulatory compliance. Further, Quality evaluators, Quality administrators, and Quality managers need efficient tools and integrated automated processes to ensure that all interactions are handled effectively and efficiently. Hence, Contact centers need systems that provide the functionalities to monitor, record, and evaluate the quality of agent customer interactions on all communication channels combined with recorded agent desktop activity. Further, the system should also have features to obtain customer satisfaction feedback through surveys upon the conclusion of their interaction with the contact center.

Businesses must evaluate the quality of their interactions to identify opportunities for improvement, but it's not efficient to evaluate every interaction. There is a need to distinguish important from routine interactions and generate the results in a consistent and automated manner. Also company's need to prevent risk arising out of lack of compliance and loss of valuable information.

Genesys Cloud CX™ Quality Assurance and Compliance consists of Integrated tools that help customers meet the above challenges. Genesys Cloud CX Interaction recording reliably records all voice and digital interactions and makes it easy to search and access recordings. Genesys Multi-monitor screen recording captures the agent desktop activity for up to four monitors while handling ACD interactions.

Genesys Cloud CX Speech and text analytics is a set of features that provide automated speech and text analytics capabilities on all interactions to provide deep insight into customer-agent conversations. For voice interaction, speech and text analytics provides automated transcription and employs speech-to-phrase grammar-based recognition. Along with non-linguistic analysis of recordings, speech and text analytics creates meaning from otherwise unstructured data. Sentiment analysis and Topic spotting enable Quality Managers to understand the overall sentiment of the interaction.

Genesys Cloud CX Quality Evaluation features includes flexible evaluation forms for use with any recorded interaction. The evaluation workflow provides both automated and ad hoc assignments, easy access to results and scheduling for ad hoc coaching. Quality Evaluation results enable contact centers to analyze performance for continuous agent improvement and improved customer experience.

Genesys Cloud CX's survey is built in to the platform and is used to send a survey to customers after any media interaction i.e. call, email, chat, and messaging. The survey includes an easy to use flexible form builder with multiple question types for a standard post-interaction satisfaction survey or a post-interaction NPS survey. Genesys sends the survey to the customer via email with a web link to the survey. Genesys Cloud built in survey solutions allows organizations to gain insight into customer satisfaction/experience regardless of the channel and other related contact center metrics.

Organizations can use Genesys Cloud CX Quality Evaluation and Compliance tools to fulfill key use cases around agent performance improvement (decrease AHT, increase FCR, sales conversion, compliance, and customer satisfaction). These precise tools help improve employee culture, technology, and operations to plan and execute strategies that bring contact center quality to new heights.

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	Improve the efficiency of agents with insights from recordings, survey, and quality assessments to enable systematic improvement of NPS.
Improved Employee Productivity	Take advantage of the Quality evaluation criteria to create targeted evaluations to identify the keys to successful sales and improve agent productivity
Improved First Contact Resolution	Leverage the Quality evaluation results and Post interaction survey results to identify and address the root cause(s) of repeat contacts thereby improving FCRs.
Improved Insights and Visibility	Use recordings of interactions and agent desktop, the quality evaluation process and post-interaction survey results to gain insight into quality, process, and procedural improvements.
Reduced IT Operational Costs	Lower total cost of ownership by eliminating the need to purchase additional hardware, software and the associated maintenance and support services through an integrated approach with GenesysCloud

Summary

Genesys Cloud CX's Quality Assurance and Compliance is a set of tools and automated processes that are built to help contact centers ensure that interactions are handled effectively and efficiently.

Organizations must evaluate and improve the quality of the interactions that their employees have with their customers and prospects. The Quality Management module helps organizations improve the quality and efficiency of agent performance which can improve customer satisfaction.

This use case includes overall multichannel (voice and digital) capabilities for interaction recording, agent desktop screen recording (multi monitor), interaction quality evaluation, ad hoc coaching, and post-interaction surveys. These key capabilities provide an effective method for defining desired agent behaviors, acknowledging and reinforcing those behaviors and identifying areas of performance improvement. These features also allow customers to verify that their agents are adhering to critical regulation and compliance.

Genesys Cloud CX Quality Assurance and Compliance provides visibility on the agent activity to understand:

- Why certain types of interactions (voice or digital) take longer to handle than others
- How well the agent understands the applications and processes
- Identify which issues are related to agent problems and which to system/ workflow issues
- Agent's handling of multiple overlapping interactions

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- Agent access to unauthorized activity
 - Adherence to compliance requirements/regulations
 - Impact to customer satisfaction

Use Case Definition

Business Flow

(1) Overall Quality Evaluation and Compliance Process flow

Business Flow

(2) Voice and Digital Recording

Quality Management uses policies to manage all ACD recordings. Policies define the criteria that Genesys Cloud CX uses to determine which interaction recordings to retain, archive, delete, export, initiate screen recording, assign for evaluation, and/or calibration, and initiate surveys.

Business Flow

(3) Screen Recording

Business Flow

(4) Quality Evaluation

Business Flow

(5) Post Interaction Survey

Business Flow

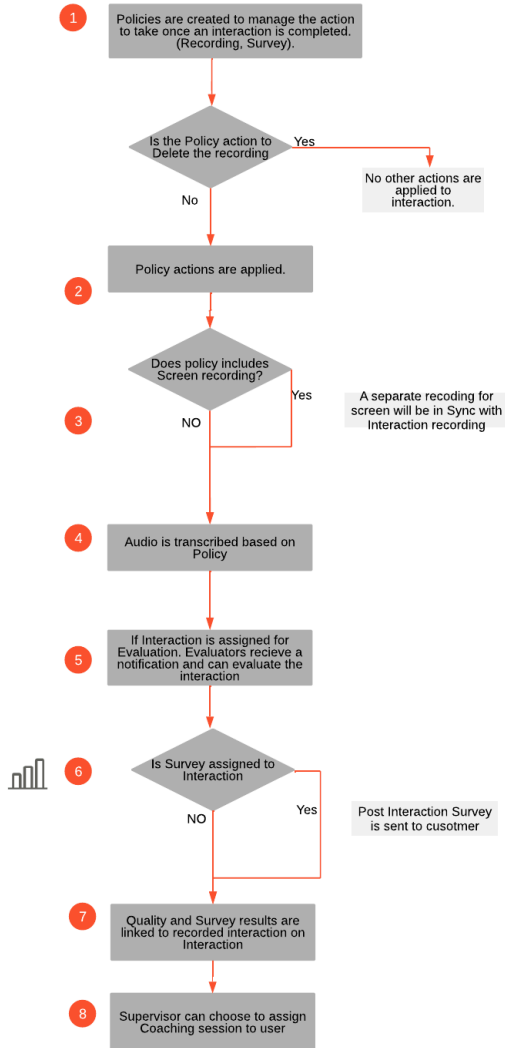
(6) Speech and Text Analytics

Business Flow

(7) Programs and Topics

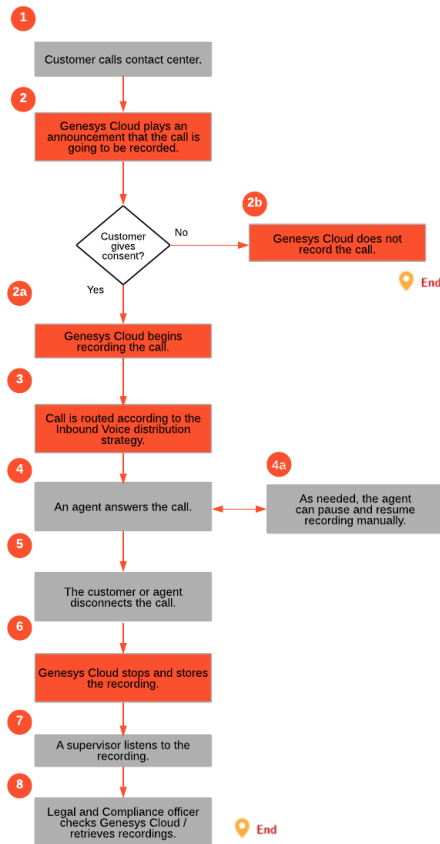
Business Flow

(8) Content Search



Business Flow Description This process flow provides an overview of the complete process of the Quality Management, Recording and STA.

1. Policies are created to manage the action to be taken on interactions. These actions include delete, retain, archive, export of an interaction recording. Policy actions can also include initiate screen recording, assign for evaluation or calibration, initiate a customer survey,
 1. If the Policy action is to Delete the recording - no other actions can be applied to the interaction.
2. If the policy action is to retain recording then an interaction is recorded and stored
3. If policy includes Screen recording - a separate recording for screen activity is available and plays in sync with the interaction recording.
4. If transcription is enabled then interaction is transcribed into text.
5. If the interaction is assigned for evaluation - Evaluators receive a notice of assigned evaluations/ calibrations
 1. Evaluator completes and releases the evaluation
 1. If assigned for agent evaluation - agent receives a notice when there is completed evaluation available for them to review and optionally comment. Agents can view all of their evaluations through Performance > My Performance > Evaluations.
 2. Supervisors can view performance of their agents through Performance > Agents > Evaluations tab.
 3. If assigned for Calibration - Evaluators receive notice of assigned Calibration. Evaluators complete the calibration
 4. Quality Administrator accesses results to compare scoring variations between evaluators
6. If the policy is assigned to send a survey for



an interaction then customer receives survey invitation via email with the survey link. Customer feedbacks from the surveys will be linked to the interaction

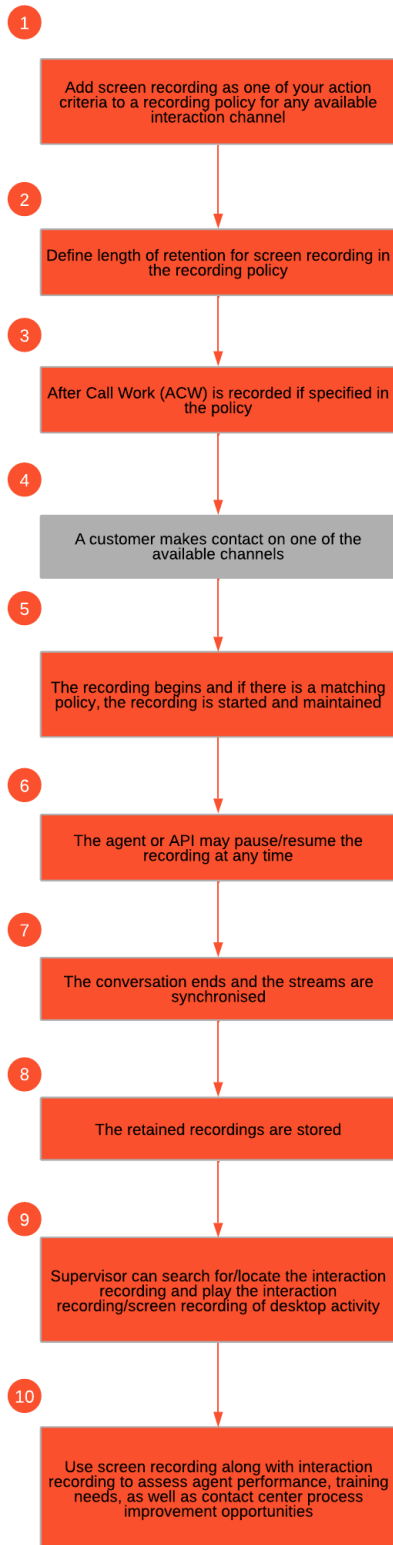
7. Quality and Survey results are linked to recorded interaction and viewed on Interaction Detail. Summary result views provide scoring results and can export for reporting needs.
8. Supervisor/ Evaluator schedules Agent Coaching session Refer to [Use Case WE03](#).

Business Flow Description

1. Customer contacts one of the service lines of the company.
2. For Voice channel, Genesys Cloud CX IVR (Optionally) plays an announcement that the call is going to be recorded.
 1. If Configured for Consent Option - The customer chooses whether to give consent to the recording. For more information about enabling participant recording, see [About recording in Genesys Cloud CX](#) and [Enable line recording](#).
 1. If the customer gives consent, Genesys Cloud CX will record the call.
 2. If the customer does not give consent, Genesys Cloud CX does not start recording the call.
3. Voice -The call is handled and routed to an agent following the logic of the Inbound Voice distribution strategy which is implemented for the Service Line. For more information, see . The Inbound Voice routing strategy is not within the scope of this use case.
 1. For all Digital routing information, visit the Digital use cases. The routing strategy for chat, email, and messaging is not within the scope of this use case.
4. Agent answers the call from any desk within the site.
 1. The agent may (if enabled) pause or resume the recording manually via the

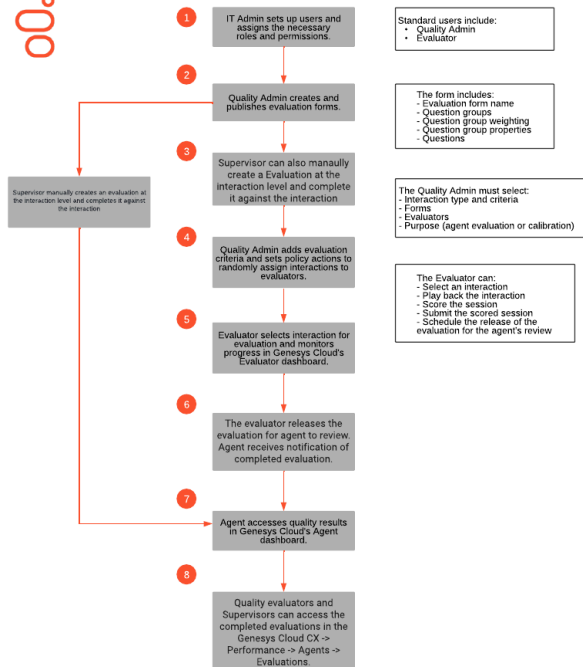
standard script ability when the agent needs to enter sensitive data.

5. Customer or Agent disconnects the interaction.
6. Genesys Cloud stops and stores the recording. Recordings are available for use in the Quality Evaluation, Calibration, and Survey Process.
7. A supervisor listens to the recording.
8. Legal and Compliance officer checks Genesys Cloud / retrieves recordings.



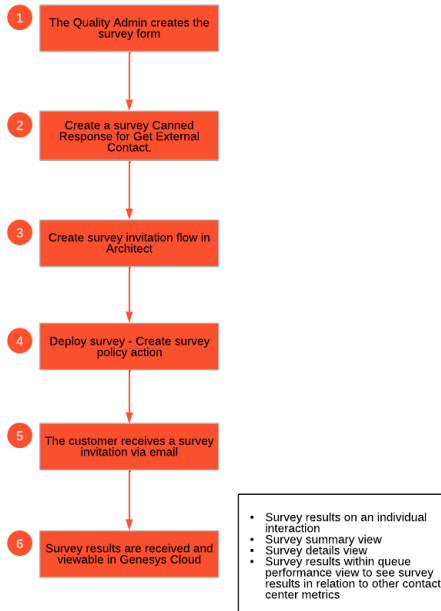
Business Flow Description

1. Add screen recording to a recording policy as one of your actions for any available interaction channel.
2. In the recording policy, define the length of retention for screen recording.
3. If the policy specifies that ACW (After call work) should be recorded then ACW is recorded.
4. The customer makes contact on one of the available interaction channels.
5. The recording begins. If a matching policy exists, recording begins and is retained.
6. The agent or API can pause or resume recording.
7. The conversation ends and streams are synchronized.
8. The retained recordings are stored.
9. The supervisor can search for or locate the interaction recording and play it, along with the screen recording of the desktop activity.
10. Use screen recording along with interaction recording to assess agent performance, training needs, and contact center process improvement opportunities.



Business Flow Description

1. Set up users. Genesys Cloud CX administrator sets up user roles and a related set of permissions. Standard users include:
 - Quality Admin
 - Evaluator
2. The Quality admin creates evaluation forms to define key elements of agent behaviors needed to meet contact center business and customer requirements. The form includes:
 - Evaluation form name
 - Question groups
 - Question group weighting (default is even weighting – weights can be adjusted and will always auto balance to equal 100%)
 - Question group properties (NA enabled, default to highest scoring or NA)
 - Questions
 - Question types (template, multiple choices, range, yes/no)
 - Addition of Evaluation assistance conditions
 - Question properties (NA enabled, critical and/or fatal, visibility conditions, comments required)
 - Question Value (numeric whole numbers)
 - Quality admin selects form to publish to make it available for use in assigning evaluations.
3. Supervisor can also manually create a Evaluation at the interaction level and complete it against the interaction.
4. Evaluation/Calibration Planning. The Quality admin adds evaluation criteria to recording policies for contact center agent groups or individual agents. The Quality admin sets policy actions to assign interactions randomly to evaluators, including criteria such as number of interactions to be scored per month/week/day. Tasks include:

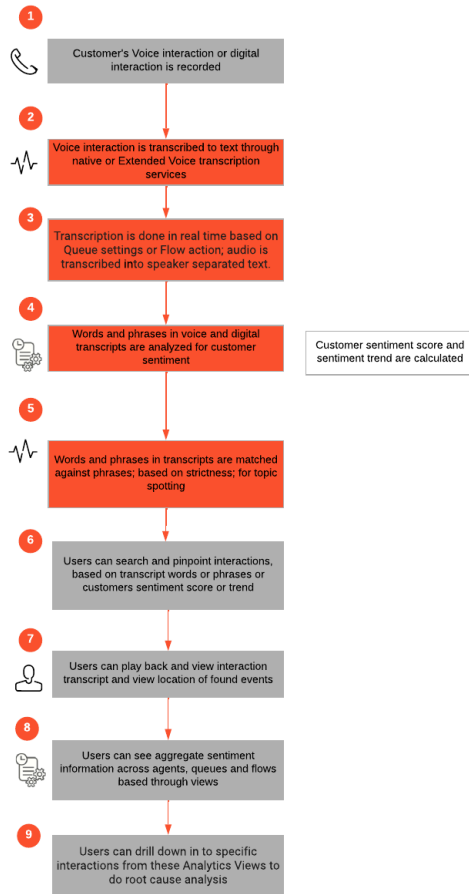


- Select interaction type and criteria
- Select forms
- Select evaluators
- Select for agent evaluation or for calibration
- Optionally: An evaluator with assignment permission selects from list of interactions and assign evaluation to self or to other evaluator.

5. The evaluator is notified of assigned evaluations. The evaluator proceeds with the reviews for their assigned agents. Genesys Cloud CX evaluator dashboard provides insight to assigned and completed evaluations.
6. The evaluator releases the evaluation for agent to review. Agent receives notification of completed evaluation available for their review.
7. Agent accesses quality results in the Genesys Cloud CX ->Performance-> My Performance-> Evaluations tab
 1. Agent checks off acknowledgment they reviewed evaluation and can add any comments.
 2. If agent requests further review - Quality administrator or Evaluator can review and rescore the interaction.
 1. Agent receives notification of rescored evaluation available for their review and same steps as above.
8. Quality evaluators and Supervisors can access the completed evaluations in the Genesys Cloud CX -> Performance -> Agents -> Evaluations.

Business Flow Description

1. Create the Survey Form.
2. Create a survey Canned Response for Get External Contact.
3. In Architect, create a Survey Invite Flow.
4. Create a survey policy action to deploy the

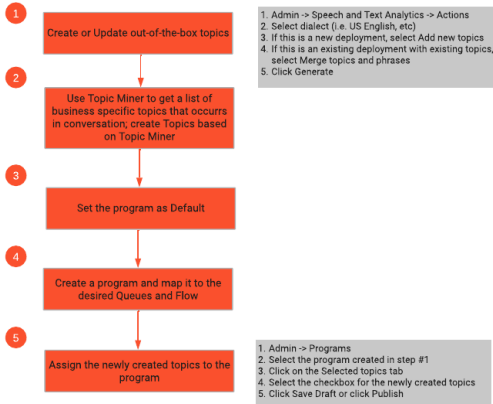


survey.

5. The customer receives survey invitation via email that includes a web link to the survey.
6. Survey results are received and viewable in Genesys Cloud CX:
 - View on the interaction
 - Survey Summary view
 - Survey Details view
 - Add survey data to Queues Performance view

Business Flow Description

1. Voice interaction or digital interaction is recorded in Genesys Cloud CX.
2. Genesys Cloud CX transcribes voice interaction through Genesys Native or Extended Voice Transcription Services
3. The transcription is performed in real time based on Queue settings or Flow action; audio is transcribed in to speaker separated text.
4. Words and phrases in voice and digital transcripts are analyzed for Customer Sentiment; a Customer Sentiment Score and Sentiment Trend are calculated for each interaction.
5. Words and phrases in voice and digital transcripts are matched against phrases; based on strictness for Topic Spotting.
6. Add business-specific words or phrases within new or existing topics to improve voice transcription.
<https://help.mypurecloud.com/faqs/how-do-i-increase-the-accuracy-of-voice-transcription/>
7. Users can search for, and pinpoint interactions, based on transcript words or phrases, detected topics or customers sentiment score or trend.
8. Users can play back and view interaction transcript and view location of found events (sentiment and topics).
9. Users can see aggregate topic and

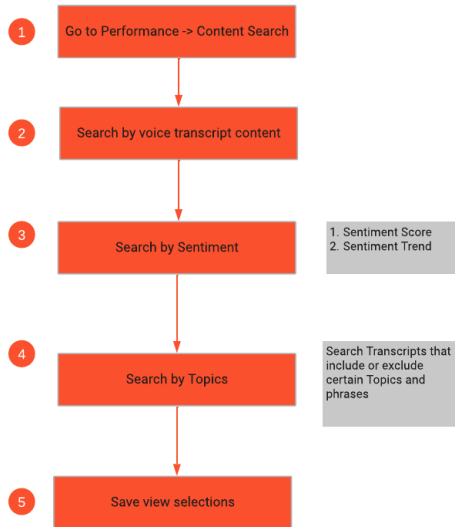


sentiment information across agents, queues and flows through Analytics Views.

10. Users can drill down in to specific interactions from these Analytics Views to do root cause analysis

Business Flow Description

1. Create or Update out-of-the-box topics (**Create out-of-the-box topics**)
 1. Admin -> Speech and Text Analytics -> Actions
 2. Select dialect (i.e. US English, etc.)
 3. If this is a new deployment, select Add new topics
 4. If this is an existing deployment with existing topics, select Merge topics and phrases
 5. Click Generate
2. Add business-specific words or phrases within new or existing topics to improve voice transcription.
<https://help.mypurecloud.com/faqs/how-do-i-increase-the-accuracy-of-voice-transcription/>
3. Use Topic Miner to use key-phrases extraction to get a list of business specific topics that are already occurring within conversations; create Topics based on what is discovered through Topic Miner (
<https://help.mypurecloud.com/articles/about-the-topic-miner/>)
4. Set a Default Program, so that is there is no mapping to a Queue or Flow, then there is a fallback (**Select a Default Program**)
5. Create a new program and map it to the desired Queues and Flows (**Create a Program**)
6. Assign any relevant out-of-the-box topics and newly created topics to the new program
 1. Admin -> Programs
 2. Select the program created above
 3. Click on the Selected topics tab



4. Select the checkbox for the required topics
5. Click Save Draft or click Publish

Business Flow Description

1. Go to Performance -> Content Search
2. Search by voice transcript content
 1. Transcript content - Displays interactions that contain specific word(s) in a transcription, with options to look for exact match, similar or not similar
3. Search by Sentiment
 1. Sentiment Score: Filter interactions by the customer's overall sentiment from -100 to +100. This score weighs all positive and negative markers at the end of the interaction to provide an indication of how the customer experienced their interaction with the contact center.
 2. Sentiment Trend: Filter interactions by the customer's sentiment trend, which is determined by comparing the sentiment in the first half or more of the interaction to the sentiment in the last few phrases of the interaction.
4. Search by Topics
 1. Search for transcripts that include selected topics: Interactions that have one or more phrases detected for the selected topics will be returned
 2. Search for transcripts that exclude selected topics: Interactions that do not have any detected phrases for the selected topics will be returned
5. Save view selections

Business and Distribution Logic

Business Logic

Archiving and Deleting Criteria

Genesys Cloud CX Policy can be configured to

defined a archive and deletion actions for recordings and screen recordings. For more information [Recording Policy](#)

Pause / Resume recording

Agents can pause or resume recordings as needed for compliance reasons. The ability for an agent to pause or resume a recording from the agent desktop is enabled or disabled based on customer requirements. APIs are also used to pause or resume a recording. If a recording of the interaction is paused for an interaction that is also being screen recorded, the pause/resume action is synchronized.

View and Download recording and screen recording

An interaction can have multiple recordings, including screen recordings. If applicable, navigate through the recordings associated with the interaction and to play the screen recording. For ,more information-> [View a screen recording and Download recording](#)

Quality Manager/ Administrator

Roles will determine the access to recording and screen recording of users. Roles can be provided additional permissions based on business requirement. The Quality Administrator and Quality Evaluator roles have the additional permissions than a user for viewing quality and recordings. For more information -> [Roles and Permissions](#)

Evaluation Sessions

To help ensure an agent's handling of interactions aligns with specific business requirements, evaluators receive assigned evaluations that they must complete according to the assignment process. A completed evaluation form provides a view into how an agent communicates with a customer. When used as part of evaluation sessions, these forms provide consistent and regular feedback and can help surface insightful results, comments, and suggestions. This can lead to formal skills training and action plans to improve agent performance. For more information-> [Evaluation form](#)

Distribution Logic

N/A

User Interface & Reporting

Agent UI

Quality Assurance and Compliance features are accessible from the Genesys Cloud CX application.

Reporting

Real-time Reporting

Genesys Cloud CX comes with several Reporting and Analytics features.

For detailed reporting features: <https://help.mypurecloud.com/articles/about-reports-views-and-dashboards/>

Historical Reporting

Genesys Cloud CX comes with several Reporting and Analytics features.

For detailed reporting features: <https://help.mypurecloud.com/articles/about-reports-views-and-dashboards/>

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	Digital <ul style="list-style-type: none">Genesys Email Routing (CE16)Genesys Chat Routing (CE18)Genesys SMS Routing (CE29)Genesys Messaging (CE34) Inbound <ul style="list-style-type: none">Genesys Personalized Routing with Callback (CE43)	None	None

General Assumptions

- 100% of ACD Interactions will be recorded. Internal calls (agent to agent) and inbound or outbound DID calls are not recorded.
- Recordings are based on what channels are configured.
- Screen recordings can be configured during interaction on any communication channel
- Surveys can be configured for any available channel.

Customer Responsibilities

N/A

Related Documentation

Genesys Catalog WEM

<https://catalog.genesys.com/wem-landing-page/>

<https://catalog.genesys.com/wem-landing-page/wem-disciplines/wem-quality-assurance-and-compliance-discipline/>

Document Version

- Version **1.1.4** last updated **April 15, 2026**