Genesys Cloud CX Use Cases

Resource Management (WE02) for Genesys Cloud

8/2/2025

Optimize workforce planning and scheduling across all channels. Automate forecasting, scheduling and improve employee engagement.

What's the challenge?

Contact centers without the right insights and tools may find it hard to create balanced schedules that prioritize customer experience while considering employee hours, contracts, preferences and labor laws. Optimizing employees' schedules is a tricky balance between customer experience and higher workforce costs. Without the ability to create forecasts easily and accurately, it's a challenge to schedule your workforce effectively.

What's the solution?

The goal of resource management is to provide the right balance between business objectives and employee work/life balance. Genesys Cloud CX automatically gathers interaction data and produces the most mathematically accurate forecast possible(>95%) . Genesys Cloud CX schedules can be built for multiple weeks across multiple management units accommodating performance goals, constraints, labour laws and union agreements.

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Use Case Overview

Story and Business Context

Contact centers are complex, continually changing entities. They often have a large human resource with varied skills and operates long hours, making Resource management a challenge. If any one element falls away – agents calling in sick, for example – the entire process could break down. Spreadsheets were once the method of choice for resource management, and creating these spreadsheets manually required a skilled, numbers-savvy manager. As the contact center becomes increasingly complex. However, manual processes become less feasible.

Forecasting expected interaction volume and creating schedules for agents are two of the most important roles of resource management. It's tricky to get right: if you under-staff the center, customer satisfaction levels go down and agents become burned out.

Resource management software can help eliminate some of the most time-consuming tasks for managers while simultaneously increasing the accuracy of forecasts and the flexibility of schedules. Some of the most common challenges of resource management are:

- Inaccurate forecasts - While managers traditionally use historical data to create forecasts, there are other factors to consider (time of year, marketing activities and even weather). The more data points involved, the more fallible manual calculations become.

- An inability to be all channels- While interactions may take up most of the resource's time, other contact media, and even manual tasks must be factored into forecasts and schedules.

- A lack of real-time exception planning - An employee may need to leave suddenly, or an unexpected spike in volume could consume more resources than expected.

- Limitations to physical premises- While your current methods of scheduling and forecasting may work well enough for employees on your physical premises, what about remote employees? or business partners?

- Problems with adherence - Schedule adherence is critical to a well-run contact center, but manual methods don't account for it. If your customer interactions are time sensitive, understanding your resourcing shortfalls and availability can improve customer experience.

Resource management is all about assigning the right employees with the right skills to the right job at the right time and through a platform that address most of the well-known challenges. Challenges such as forecasting accuracy, multichannel resource allocation, exception handling, and adherence control have been around for a while. However, a wealth of resource management software today continues to use Erlang-C based forecasting and scheduling algorithms which do not provide the accuracy, processing speed nor the agility required to fulfill the expected digital channel explosion (digital transformation), the rise of asynchronous messaging and combined self and agent-assisted journeys.

Genesys Cloud Resource management helps simplify the process of forecasting interactions and scheduling employees in multichannel contact experience environment. Its AI-powered core capabilities help companies optimize resource utilization through highly accurate forecasts and lightning fast scheduling so that supervisors can spend more time coaching their agents to achieve

organizational goals.

Genesys Tempo is a mobile application on iOS and Android platforms for Genesys Cloud. It empowers the workforce to achieve a work-life balance with the ability to self-manage their working hours from their mobile device. Through this app, employees can view their schedule, receive notifications when a schedule is added, changed or removed, and keep track of their working hours quickly and efficiently. They can also put in time-off requests and receive notifications when request statuses change or changes occur. With the latest release, users can now see what days are available for leave, which slots are filling up quickly and where they are in line for waitlisted time-off requests.

By applying other workforce engagement capabilities, facilities and resource management teams can determine new arrangements for flexible work-time allocation, work-remote scenarios, gamification, and other employee self-managed services. This is done through agile, upgrade-free, and rapid innovations delivery in a single platform to keep operational efficiency, effectiveness, and business performance under control.

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	Getting the customer to the most appropriate resource on the first pass results in fewer transfers, shorter contacts, and improved end-customer satisfaction.
Improved Employee Utilization	Optimize planning and resource utilization through accurate omnichannel forecasting, scheduling, and skills. Improve Agent Adherence to Workforce Schedule by offering visibility into current information on agent performance metrics, schedule adherence, and forecast variances. This information allows for better management of variances between target and actual availability.
Reduced Administration Costs	Reduce manual workforce administration activities by decreasing the time and costs associated with manual WFM efforts through automated data collection, forecast creation and schedule generation.
Reduced Handle Time	Ensure that the appropriate number of best-qualified agents are scheduled at the right time.
Reduced Overtime Costs	Create precise schedules and reduce overtime expenses with more accurate forecasting.

Summary

Resource Management forms part of the critical operations in all modern customer experience environments and is a process that maximizes performance levels and competency for a Contact center. The process includes all the activities that are needed to maintain a productive workforce, such as human resource management, budgeting, forecasting, scheduling, and analytics.

Genesys Cloud Resource management provides software to support contact center workforce management that delivers a set of optimized schedules, utilizing agent skills and contract rules while providing editing and monitoring capabilities for the contact center. Demand-oriented resource management enables planners to optimize staffing by creating schedules that conform to the forecasted requirements. At the same time, a resource management solution helps organizations manage adherence to all relevant legislation, local agreements, and the contracts of individual employees such as work-life balance guidelines.

In today's world of multiple digital channels, a contact center could have set call hours but digital channels are always on. Without the right insights, it's hard to create balanced schedules that allow contact centers to be responsive to digital interactions while considering employee hours, contracts, preferences, time off, and labor laws.

Genesys Cloud Resource management helps you find the right balance. Genesys solution automatically gathers data, making it easy to get accurate forecasts and scheduling scenarios across channels. Factor in arrival patterns and hours of operation to cover your bases, and get real-time insight and monitoring into SLAs and schedule adherence.

Use Case Definition

Business Flow

(1) Operation Rules / Basic configuration
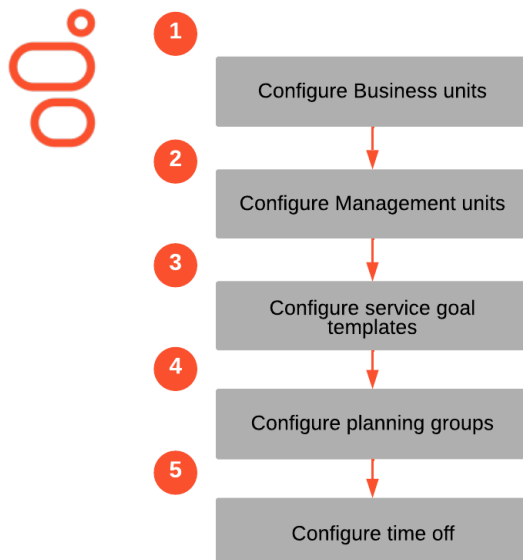
Business Flow Description

1. Configure Business Units

   1. Add Business Unit name, Start Day of week, Timezone, Division

   2. Select Historical weeks in Short-term forecasting

2. Configure Management units

   1. Add Management Unit Name, Division

   2. Add Planning Period, Maximum occupancy %, Planning period length

   3. Set Adherence Thresholds, Target, and Exceptions

   4. Enable or Disable Shift trading and set criteria for automatic review

3. Configure service goal templates

   1. Add Service goal Group Name

    2. Set Service goals consisting of Interactions answered %, Enable average speed of answer and Abandonment rate

4. Configure planning groups

    1. Add Planning group name

    2. Select a Service goal template for the planning group

    3. Verify the Agents list who can handle the planning Group are displayed.

5. Configure/edit time off

    1. Add new Activity Code name

    2. Set Activity category, Length, Enable, or Disable activity code as Paid Time or Work time

    3. Set Time-off limit

    4. Configure Time-off plan

Business Flow

(2) Work Plan configuration
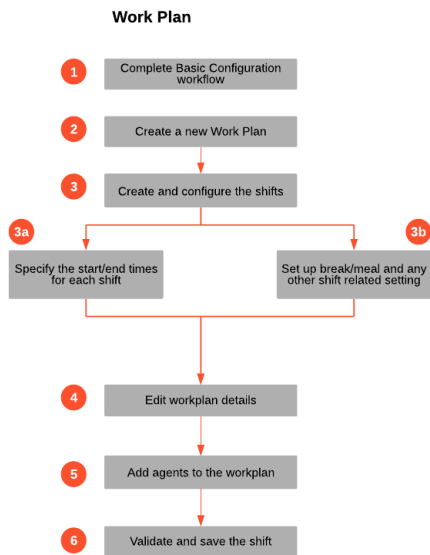
Business Flow

(3) Forecasting

Business Flow
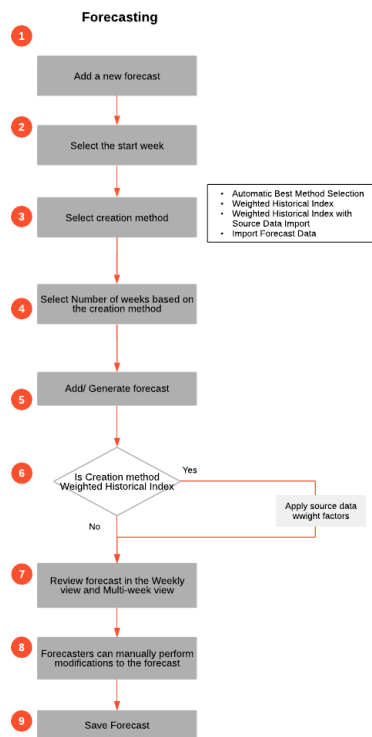
(4) Time off Planning

Business Flow

(5) Scheduling

Business Flow

(6) Shift Trading

Work Plan

1	Complete Basic Configuration workflow
2	Create a new Work Plan
3	Create and configure the shifts

3a		**3b**
Specify the start/end times for each shift		Set up break/meal and any other shift related setting

4	Edit workplan details
5	Add agents to the workplan
6	Validate and save the shift

Business Flow Description

1. Complete the Operational rules/ Basic configuration workflow

2. Create a new work plan by Adding a new work plan or copy an existing work plan

3. Create and configure the shifts:

    1. Specify start / end-time for each shift.

    2. Set up break / meal and any other shift-related setting.

4. Edit Work plan details

    1. Set weekly constraints

        1. Enable or disable weekly paid time

        2. Set minimum and maximum workdays per week

        3. Set minimum consecutive time off per week

    2. Set weekend constraints

    3. Set planning period constraints consisting of

        1. Minimum and maximum days off per planning period

        2. Minimum and maximum paid time per planning period

    4. Set general constraints consisting of Daily paid time divisible, Maximum consecutive working days, and minimum time between shifts

5. Add Agents to the work plan.

6. Validate and Save work plan.

Forecasting

1. Add a new forecast
2. Select the start week
3. Select creation method
   - Automatic Best Method Selection
   - Weighted Historical Index
   - Weighted Historical Index with Source Data Import
   - Import Forecast Data
4. Select Number of weeks based on the creation method
5. Add/ Generate forecast
6. Is Creation method Weighted Historical Index
   - Yes → Apply source data wwight factors
   - No
7. Review forecast in the Weekly view and Multi-week view
8. Forecasters can manually perform modifications to the forecast
9. Save Forecast

Business Flow Description

1. Add a new forecast
2. Select the start week
3. Select creation method
   1. Automatic best method selection
   2. Weighted historical index
   3. Weighted historical index with source data import (example)
   4. Import forecast data (example)
4. Select number of weeks based on the creation method
5. Add/Generate forecast
6. In case of Weighted historical index method, select source tab you apply the Source data weight factors for more emphasis on a specific period
7. Review forecast in the weekly view and multi-week view
8. Forecasters can manually perform modifications to the forecast
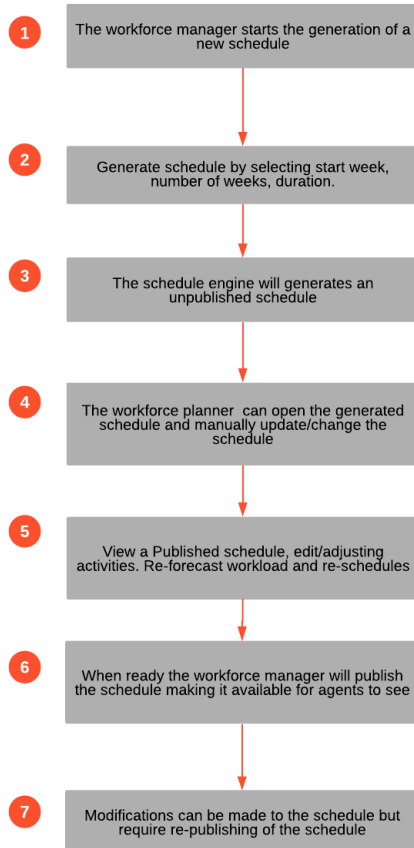9. Save forecast
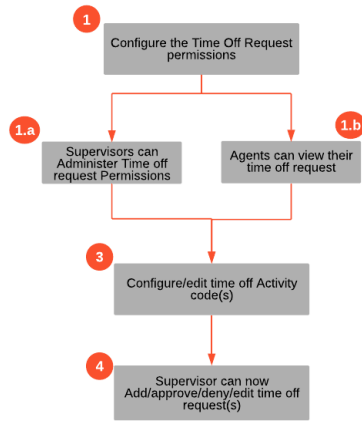
Business Flow Description

1. Configure the time off Request permissions

   1. Supervisors can Administer time off request Permissions through:

      1. Workforce Management > time off Requests > Add, Administer, Delete, Edit, View and Notify.

      2. Workforce Management > time off limit > Add, Edit, View and Delete.

      3. Workforce Management > time off plan> Add, Edit, View and Delete.

   2. Agents can view and make their time off request through: Performance > Overview > Agent tab > Schedule.

2. Configure/edit time off Activity code(s).

3. Set time-off limits.

4. Configure time-off plans as manual or automated.

5. Configure time-off limits for auto approve time-off plans.

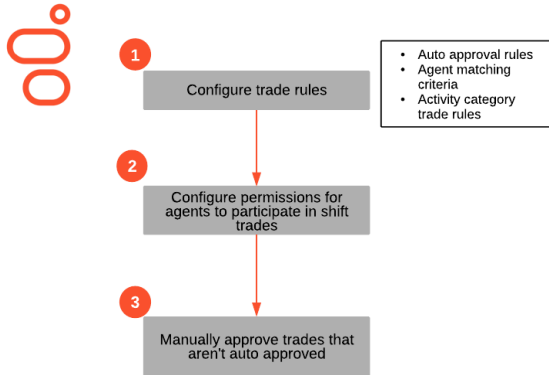6. Supervisor can also Add/approve/deny/edit time off request(s).

Scheduling

Step	Description
1	The workforce manager starts the generation of a new schedule
2	Generate schedule by selecting start week, number of weeks, duration.
3	The schedule engine will generates an unpublished schedule
4	The workforce planner can open the generated schedule and manually update/change the schedule
5	View a Published schedule, edit/adjusting activities. Re-forecast workload and re-schedules
6	When ready the workforce manager will publish the schedule making it available for agents to see
7	Modifications can be made to the schedule but require re-publishing of the schedule

Business Flow Description

1. The Workforce manager starts the generation of a new schedule based on a forecast or by adding a blank schedule

2. Generate schedule
   1. Select Schedule start week
   2. Select number of weeks
   3. Schedule duration
   4. Description

3. The Schedule engine generates an unpublished schedule.

4. The Workforce planner opens the generated schedule and manually updates / changes the schedule. The workforce planner can edit the following in a schedule:
   1. Add, move, delete activity
   2. Swap shifts between agents
   3. Add shifts to agents
   4. Reschedule
   5. Publish schedule

5. View a Published schedule, edit/adjusting activities would change schedule for the agents concerned
   1. Reforecast workload and reschedules

6. When ready, the workforce manager publishes the schedule and makes it available for the agents.

7. Modifications to the schedule require republishing the schedule

- Auto approval rules
- Agent matching criteria
- Activity category trade rules

Configure trade rules

Configure permissions for agents to participate in shift trades

Manually approve trades that aren't auto approved
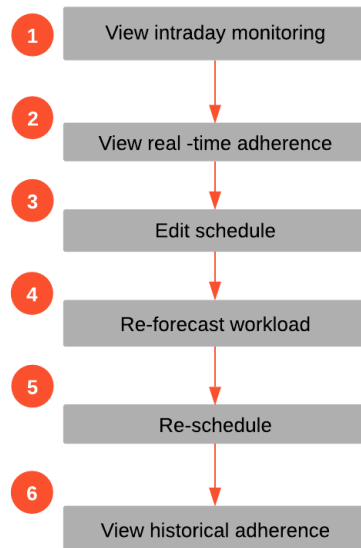
Business Flow Description

1. Configure trade rules.
   1. Auto approval rules
   2. Agent matching criteria
   3. Activity category trade rules
2. Configure permissions for agents to participate in shift trades
3. Manually approve trades that aren't auto approved

Business Flow

(7) Intraday Management

1	View intraday monitoring
2	View real -time adherence
3	Edit schedule
4	Re-forecast workload
5	Re-schedule
6	View historical adherence

Business Flow Description

1. View intraday monitoring
2. View real-time adherence
3. Edit schedule
4. Reforecast workload
5. Reschedule
6. View historical adherence

Business and Distribution Logic

Business Logic

A prerequisite to any basic WFM deployment is a formal discovery process. The formal discovery process produces specific documentation.

Distribution Logic

N/A

User Interface & Reporting

Agent UI

Resource Management features are accessible from the Genesys Cloud application.

Reporting

Real-time Reporting

Genesys Cloud WFM 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 WFM 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** • Genesys Email Routing (CE16) • Genesys Chat Routing (CE18) **Inbound** • Genesys Personalized Routing with Callback (CE43)	None	None

General Assumptions

• Workforce Resource Management is available for the Inbound Interaction type for all channels.

• A Business unit is limited to 5,000 agents.

• A management unit is limited to 1,500 agents.

• The use case does not include any of these advanced options:

  • Integration to 3rd party WFM tools **(There are native integrations for some. There** are public APIs**'s available as well. APIs are available to those agents that want to use them.**)

  • Advanced Customization - API customization

• Bullseye Routing configurations will not be supported as **bullseye routing and WFM don't play too well together. It's not best practice.**

• Scheduled callbacks, non-scheduled callback, and ACD Voicemail appear as callbacks in forecast and schedules.

• The setup of Business units, Planning groups, Service Goal templates, Management units, Agents, Activity Codes, and basic Work plans are a prerequisite for planning. **These objects must be configured and required permissions to use them and set them must be in place.** Genesys

Professional services can be used for initial setup of the pre-requisites.

- Complete the initial setup to before creating any schedule

Customer Responsibilities

N/A

Document Version

- Version **1.1.2** last updated **August 2, 2025**