



This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

# Genesys Cloud CX Use Cases

Employee Performance (WE03) for Genesys Cloud

7/27/2024

---

## Agent Skills development, Performance management and Gamification

### What's the challenge?

Contact centers undergo constant employee turnover, which makes it difficult to keep employees up-to-date on company policies, procedures, and new products and services. Contact centers need a solution to quickly onboard and train new employees.

Leaders have to identify high and low performance against defined KPIs to reward high performers and provide coaching and mentoring to employees who need it most. A tailored, appropriate, and precise development plan is vital.

But often, gauging performance is a challenge because KPI metrics are spread across multiple systems. Contact centers need a solution that brings this data together to provide a holistic scorecard to ensure an accurate and comprehensive view of performance.

Motivating and engaging employees to perform well can also prove challenging. Often, employees must navigate different systems or locations to complete tasks or understand their performance expectations. Having a centralized, at-a-glance view of tasks and clear, up-to-date information on their performance helps alleviate employee pains of working in a contact center and improve contact center KPIs like employee turnover, engagement, and productivity.

### What's the solution?

Genesys Cloud CX provides a best-in-class workforce engagement suite for managing the end-to-end employee performance and development journey.

The solution enables effortless delivery of training, informational content, or assessments to employees to help employees onboard, learn, and stay up-to-date on vital information within your organization. These modules can be delivered automatically based on rules or manually assigned, allowing managers to build customized learning and development journeys for employees.

Genesys Cloud CX gives employees a single, holistic view of the information needed to perform their role successfully. Performance metrics from across the contact center are consolidated into a unified, gamified scorecard that can be viewed by employees and managers to understand performance across defined objectives. Employees can see where improvements are needed and compare performance amongst their peers for increased motivation, peer-to-peer learning, and improved performance.

Managers can quickly identify performance gaps and easily bring together interactions, evaluations and supporting documents to set up and conduct coaching sessions to improve KPIs.

Genesys Cloud CX lets you deploy powerful workforce engagement capabilities for onboarding, learning, coaching, performance management and gamification from a single platform. The solution makes the lives of your employees better by minimizing traditional, tedious manual processes and promoting a more collaborative working environment.

---

[Link to video](#)

## 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 Flow](#)
  - [4.3 Business Flow](#)
  - [4.4 Business and Distribution Logic](#)
- [5 User Interface & Reporting](#)
  - [5.1 Agent UI](#)
  - [5.2 Reporting](#)
- [6 Customer-facing Considerations](#)
  - [6.1 Interdependencies](#)
- [7 Related Documentation](#)
  - [7.1 WEM Catalogue](#)
  - [7.2 Genesys Cloud Documentation](#)
  - [7.3 Document Version](#)

---

## Use Case Overview

### Story and Business Context

High-performing, happy employees are an integral part to a successful contact center. In a recent study by Gartner, 86% of organizations consider employee engagement an equal or more important factor in achieving customer experience (CX) and, consequently, contact center goals. This is because the more engaged an employee is the more likely they will perform well in their role. To meet and surpass employee performance objectives, contact centers need to deploy a holistic, deeply integrated workforce engagement solution that provides the following key capabilities—onboarding development, learning & training, performance management, coaching, and gamification.

#### *Personalized learning and development from day one*

To deliver consistent, positive customer experiences, employees need to be well-informed and trained on company product, services, policies, and procedures. With Genesys Cloud you can deliver training, informational content, or assessments to employees to help them onboard, learn, and stay up-to-date. Personalized training can be delivered automatically based on rules or manually assigned, allowing managers to build customized learning and development journeys for employees within your organization. Regardless of start date, all employees quickly receive the necessary training to perform well in their role.

#### *Powerful and intuitive performance management*

Once employees are trained, leaders need to easily identify high and low performing employees against defined objectives and goals so that they can reward good performance and focus limited resources on coaching and mentoring those that need it most. Genesys Cloud consolidates performance metrics from across the platform into unified scorecards that can be viewed by managers and employees alike to understand performance across all defined objectives. Real-time metrics let managers and employees improve KPIs when needed most. Historical individual and team trends in performance help managers with planning, evaluations, and training initiatives.

#### *Strategic coaching and training sessions*

Strategically planned coaching sessions are known to significantly improve employee performance. Supervisors and quality managers can identify, assign, and schedule training sessions through a single, seamless process. Genesys Cloud centralizes all necessary information and documentation to complete a productive coaching session. And because it's integrated to Workforce Management, you can complete in a single go — no need to check with other departments for best available time slot.

#### *A single, easy-to-use employee dashboard*

Employees not only want to meet their performance goals but grow and develop within their roles. Too often, however, an employee's performance and development are hindered by the tools they use. Having to navigate several disjointed systems to complete tasks or understand their manager's performance expectations frustrates employees and contributes to low employee engagement and productivity — ultimately affecting employee retention.

Empower your employees to outperform by giving them a single, holistic view of the information needed to perform their role successfully, including employee schedule, performance metrics and

---

goals, evaluations, and personalized development plans.

### *Gamified performance scores to motivate employees*

Employee performance metrics across KPIs are gamified into user-friendly performance scorecards and leaderboards. Employees can see how their performance tracks and compares against teammates in real-time — encouraging healthy competition and facilitating performance improvements when needed. Gamification in employee performance management is key to building strong employee engagement, especially when your teams work remotely. By leveraging people’s intrinsic motivator for status and recognition, competition and feeling of community, contact centers are able to motivate their employees to improve their overall performance and develop professionally along the way.

## 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:

<b>Use Case Benefits</b>	<b>Explanation</b>
Improved Agent Competency	Access to intuitive, real-time gamified performance dashboards empowers agents to understand their performance and focus on self-development and improve their competence.
Improved Employee Satisfaction	Easy-to-use, gamified performance dashboards, personalized learning modules, and insightful coaching sessions empower agents to reach performance goals faster, increasing employee satisfaction.
Improved Insights and Visibility	Providing a structured measurement and deep insights into agent development at each stage of the learning journey helps address any knowledge gaps diligently.
Reduced Administration Costs	Centralized and automated management of Employee performance, learning & development reduces administrative overhead, effort, and cost.
Reduced Employee Attrition	Clearly defined recognition and rewards system integrated with personalized skill development tools motivates agents to reach their goals and grow within the organization.

## Summary

Genesys Cloud makes the lives of your employees better by minimizing tedious manual processes, providing actionable data transparency and consolidation, and streamlining how your various teams work together. Through a single, holistic solution, it delivers the key capabilities necessary for a modern and effective performance management strategy— onboarding, training & development, performance management, coaching, gamification, and voice of the employee. Genesys Cloud creates an easy-to-use, collaborate working environment for employees, supervisors, managers, and leadership.

Most contact center leaders aren’t happy with the high costs of agent attrition, overwhelmed team

---

leaders, underwhelming CSAT/NPS scores, and all the other daily realities that cause them heartburn. Instead of suffering with the status quo of outdated, complicated, and disparate systems for workforce optimization, contact center leaders can deploy an end-to-end workforce engagement management solution.

Performance management is an integral part of workforce engagement management for enabling contact center to align people, processes, and systems to organizational goals and objectives, such as customer satisfaction and experience, cost control and revenue generation.

This use case guides organizations to create organization-specific learning modules, schedule coaching and training sessions, customize performance scorecards, and implement gamification tools like leaderboards. Competitions, badges and social elements coming soon.

This use case and solution is well integrated providing native capabilities in learning management, coaching, gamification and performance management.

- Built-in learning module designer can add multimedia-rich assessments and learning material.
- Employee performance is consolidated from multiple sources and used in gamification.
- Coaching functionality delivers a set of capabilities that allows workforce planners to efficiently plan and execute offline scheduling of activities in the most efficient manner.

The agent activity view enables Agents to view a variety of data directly associated with their schedule, tasks, and performance. At a glance, the agent activity view provides a current summary of the off-queue information in one location. From the agent activity view, agents can view their current or upcoming schedule, scorecard, leaderboard, and coaching appointments. For examples, agents can:

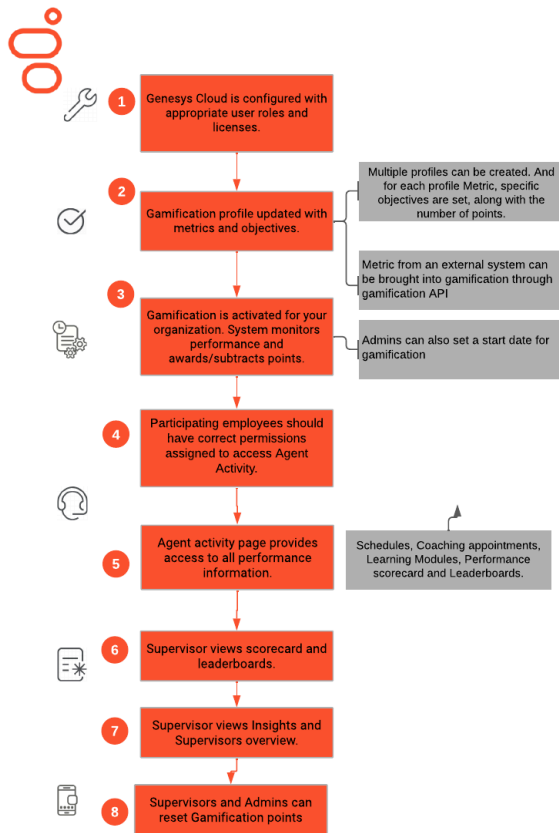
- See today's schedule
- Stay in adherence / conformance (take breaks at the specified time)
- View manager evaluations and provide feedback
- Meet supervisor for coaching
- See My Performance compared against objectives and peer performance
- Get up-to-date on new policies and procedures
- Complete learning content of work on personal development

Real-time reporting provides detailed analysis of agent progress and task completion, while identifying any gaps in performance. Easy-to-use performance dashboards help organizations identify high-performers, the skills & capabilities necessary to deliver great customer experiences, and benchmark those results with the rest of the team. This improves performance management and decision-making around agent engagement and development activities — from onboarding, ad-hoc, and ongoing training. As skilled and capable agents are more likely to provide consistent customer experiences like maintaining resolution rates and handle times, it's vital to conduct effective onboarding programs, track & measure performance, and provide appropriate training and coaching sessions.

# Use Case Definition

## Business Flow

### Performance Management and Gamification



### Business Flow Description

1. Genesys Cloud is configured with appropriate user roles and licenses.
2. The Gamification Profile is updated with the specific set of Metrics to include as part of managing the performance of your Employees.
  1. For each Metric, specific objectives are set, along with the number of points to award based on the performance achieved.
3. Gamification is globally activated for the Organization, subsequently, the system monitors performance and awards/ subtracts points accordingly.
  1. Admins can also set a Start Date for Gamification.
4. For those Employees participating in Performance Management and Gamification, the correct permissions must be assigned so that they can access the Activity page.
5. The Activity page provides Employees with one-click access to all of their upcoming and outstanding tasks as well as access to their performance information, this includes:
  1. Today's schedule for the Employee, highlighting what activity is next if scheduled through workforce management.
  2. Any upcoming Coaching Appointments or assigned Development and Feedback Modules.
  3. Performance Scorecard with historical trend information.
  4. Leaderboards for overall and per metric performance.

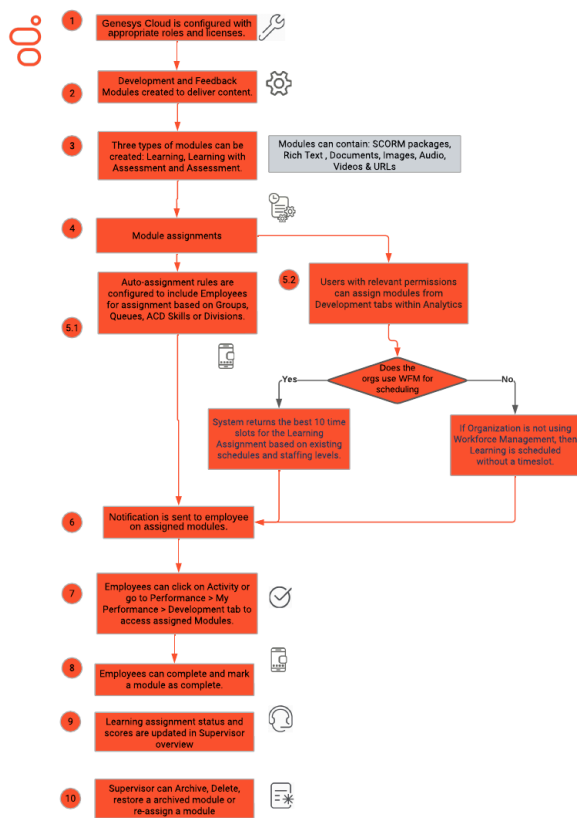
6. Supervisors can view an Employees' Scorecard through Performance > Agents > Scorecard tab.
7. Supervisors can view overall Leaderboards through Performance > Agents > Leaderboards tab.
8. Supervisors and Admins can reset the Gamification if needed.

## Business Flow

### Coaching

## Business Flow

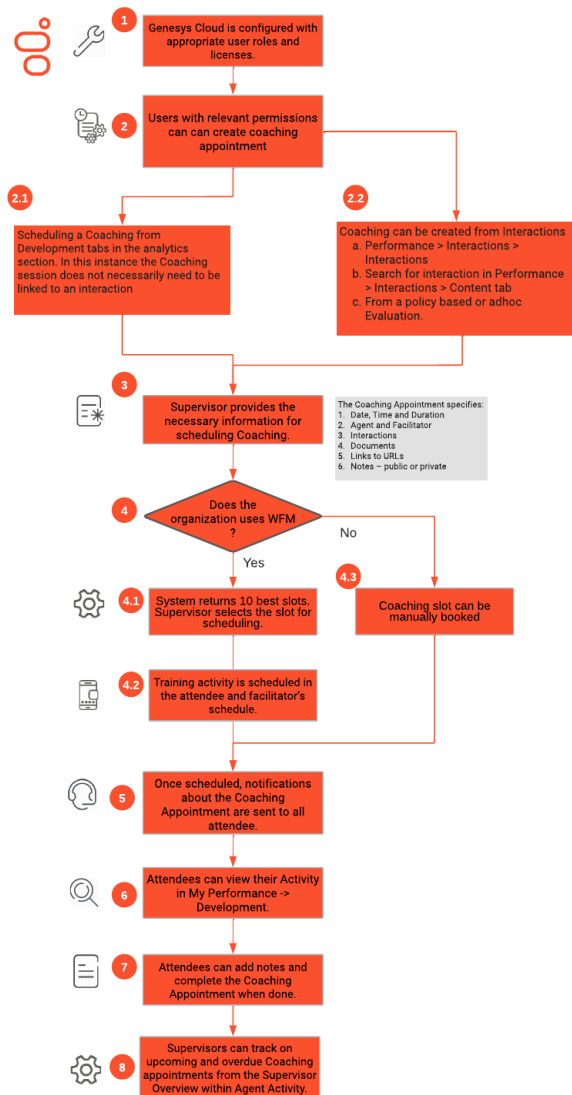
### Development and Feedback



## Business Flow Description

1. Genesys Cloud is configured with appropriate user roles and licenses.
2. Development and Feedback Modules are created to deliver content to Employees
3. Modules can contain: Documents, Images, Audio, Videos and Links to URLs
4. Modules can be assigned to users in one of two ways:
  1. Auto-assignment rules are configured which can include or exclude Employees for assignment based on Groups, Queues, ACD Skills or Divisions.
    1. Modules are Published and delivered to Employees immediately or overnight if Group, Queue, ACD Skill or Division memberships are updated.
  2. Users with relevant permissions are able to navigate to the Development tabs within Analytics and assign modules at an individual level by selecting from a list of available modules. This allows Managers to assign content to individuals at the point of need to resolve challenges at an individual level





## Business Flow Description

1. Genesys Cloud is configured with appropriate user roles and licenses.
2. Users with relevant permissions such as Supervisors and Quality Administrators can schedule a coaching appointment by:
  1. Clicking on the Schedule Coaching button from the Interaction Detail view to create a Coaching appointment with that interaction included or can add that interaction to an existing Coaching appointment.
1. Supervisors or Quality Evaluators can find interaction of interest to use for Coaching in multiple ways:
  1. Searching for interactions of interest in Performance > Interactions > Interactions tab using various meta data filter criteria.
  2. Searching for interactions of interest in Performance > Interactions > Content tab using various meta data and speech and text analytics filter criteria.
  3. Directly from a policy based or Ad-hoc Evaluation.
2. Scheduling a Coaching session by navigating to the Development tabs in the analytics section. In this instance the Coaching session does not necessarily need to be linked to an interaction, allowing Coaching sessions to be created for all requirement
3. The Coaching Appointment specifies:
  - Date, Time and Duration
  - Agent and Facilitator
  - Interactions
  - Documents
  - Links to URLs
  - Notes – public or private
4. If the Organization is using Workforce Management for scheduling, the system will return the best 10 time slots for the

---

Coaching Appointment based on existing schedules and staffing levels.

- A Coaching session is scheduled in the attendee and facilitator's schedule.
  - If Organization is not using Workforce Management then Coaching is scheduled without a timeslot
5. Once scheduled, notifications about the Coaching Appointment are sent to all attendee through their Inbox.
  6. Attendees can click on Activity or go to Performance > My Performance > Development tab to see and access any upcoming Coaching Appointments.
  7. Attendees can add notes and complete the Coaching Appointment when done.
- 
5. Once assigned, a notification about the assigned Modules is sent to the Employee through their Inbox.
  6. Employees can click on Activity or go to Performance > My Performance > Development tab to see and access any assigned Modules.
  7. Employees can mark a Module as Complete when done.

## Business and Distribution Logic

### Business Logic

- Genesys Cloud is configured with appropriate user roles and licenses.
- Business rules must be set up to assign the learning items to the agent target group.
- Genesys Cloud Coaching permissions are needed to schedule a Coaching session.
- Genesys Cloud Workforce Management is needed for optimizing scheduling.
- Gamification/ Performance Manager must decides on the Performance data that needs to be measured.
- Supervisor and Agents need to finalize the performance objectives that are to be achieved including the KPI that needs to be tracked.
- Periodic review process with necessary learning items and coaching should take place between the Supervisor and agent to agree the final targets.
- Agents can view their Assigned Learning Module from Module Icon in the Inbox
- Agents can also view their Assigned Learning items with appropriate due dates in the Activity Tab of Genesys Cloud.

- Agent feedbacks should always be incorporated to enhance the system on a periodic basis.

### Distribution Logic

N/A

## User Interface & Reporting

### Agent UI

N/A

### Reporting

#### Real-time Reporting

Reporting and Analytics insights on Employee Performance would be available as part of the Functionality reports and through Analytics reports.

#### Historical Reporting

Same as Real time reporting. Reporting and Analytics insights on Employee Performance would be available as part of the Functionality reports and through Analytics reports.

## 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	<b>Workforce Engagement</b> <ul style="list-style-type: none"> <li>• Quality Assurance and Compliance (WE01)</li> <li>• Resource Management (WE02)</li> </ul>	None

---

## General Assumptions

Employee Performance functionalities are available only for Genesys Cloud3

## Customer Responsibilities

N/A

## Related Documentation

### WEM Catalogue

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

<https://catalog.genesys.com/wem-landing-page/wem-disciplines/wem-employee-performance-discipline/>

---

## Genesys Cloud Documentation

Genesys Cloud Documentation is the source of truth for updated functionalities addressed by the Use case,

<https://help.mypurecloud.com/articles/schedule-a-coaching-appointment/>

<https://help.mypurecloud.com/articles/coaching-with-quality-management-overview/>

<https://help.mypurecloud.com/articles/agent-activity-overview/>

<https://help.mypurecloud.com/articles/about-gamification/>

<https://help.mypurecloud.com/articles/about-development-and-feedback-modules/>

---

## Document Version

- Version **1.0.1** last updated **July 27, 2024**