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Genesys Multicloud CX Use Cases

Genesys SMS Notification (CE12) for Genesys Multicloud CX

Use SMS and email to send personalized, timely and relevant notifications to customers.

What's the challenge?

Customers want a quick way to be notified of appointment reminders, delivery notifications, fraud alerts, coupons, loyalty program information, surveys and much more. Repeated handling of unnecessary outbound calls and preventable inbound follow-up drives up costs and can damage customer and employee satisfaction.

What's the solution?

Communicate important information simply and efficiently using Genesys SMS / Email Notifications. Customers experience a more satisfying and engaging experience with businesses. And companies reduce operational costs while ensuring important and time-sensitive digital alerts are delivered to customers wherever they are.

Other offerings:

Genesys Cloud Genesys Engage on-premises

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Use Case Overview

Story and Business Context

Consumers want businesses to send them proactive notifications when that information is personalized, timely, and relevant. The text messaging channel is an efficient, quick way to notify customers of appointment reminders, delivery notifications, fraud alerts, coupons, loyalty program information, surveys, and much more. Many companies struggle with adding the SMS channel to their outbound notification strategy for marketing, care, or collections. This use case offers the ability to configure and run outbound SMS campaigns based on customer-provided contact lists.

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 Conversion Rates	Conversion rates, close rates, cross-sells and up-sell rates improve through the ability to automatically generate outbound calls and empowering agents with single searchable desktop application that shows customer context.
Improved Customer Experience	Improve NPS by proactively notifying customers through SMS.
Improved Employee Utilization	Reduce agent-assisted outbound calls by automatically sending communications through SMS.
Reduced Volume of Interactions	Decrease inbound interactions by proactively sending communications through SMS.

Summary

This use case enables companies to proactively send customers notifications using SMS for marketing, care, or collections purposes. The company can use its marketing, CRM, or collections system to generate contact lists based on a one-time event, recurring events, or trigger-based events. The lists include the appropriate contact details, such as contact name, mobile phone number, and contact reason. Delivery results are recorded in the system to feed into reports.

Outbound SMS notification examples include:

Financial Services	Telecom	Healthcare	Utilities
<ul style="list-style-type: none">• New customer engagement	<ul style="list-style-type: none">• Going over plan alerts	<ul style="list-style-type: none">• Appointment reminders	<ul style="list-style-type: none">• Service call confirmation

Financial Services	Telecom	Healthcare	Utilities
<ul style="list-style-type: none"> • Replenish prepaid card reminders • Payment reminders • Fraud alerts 	<ul style="list-style-type: none"> • Payment reminders • Upgrade eligibility • Customer win back 	<ul style="list-style-type: none"> • Wellness updates • Refill prescriptions • Claim status updates 	<ul style="list-style-type: none"> • Planned downtime • Outage status • Payment reminders
Retail	Insurance	Collection Agencies	Travel and Hospitality
<ul style="list-style-type: none"> • Sales alerts • Order confirmations • Product recalls • Loyalty program activity 	<ul style="list-style-type: none"> • Quote follow-up • Payment reminders • Claims status updates • Renewal notice 	<ul style="list-style-type: none"> • Payment reminders • Late payment alterations • Payment confirmations 	<ul style="list-style-type: none"> • Booking confirmation • Upselling service • Payment reminders • Travel updates • Loyalty program activity

Use Case Definition

Business Flow

Business Flow Description

1. An Admin (or Genesys PS) configures the campaign strategy and settings in Genesys.
2. The organization either prepares a contact list from a third-party system (such as CRM or Collections) or configures their system to utilize Genesys REST API to insert contact records based on an event, a list, or an API format defined by Genesys.
 - Batch Upload Option: Customer contacts are loaded through the User Interface or utilizing List Automation configured jobs.
 - API Upload Option: Customer contacts are loaded through the standard Genesys Engage APIs.
3. The campaign begins contacting consumers based on the campaign template, strategy,

and settings configured in the first step, filtering out those contacts that meet the settings criteria. The Genesys system checks each contact/record against the relevant Do Not Call and suppression lists to filter out consumers who should not be contacted.

4. Genesys compiles the SMS text from a standard template using up to four custom fields provided with the contact list, or the customer creates the SMS message using the self-service capabilities within the User Interface (self-service capabilities must be enabled by Genesys PS). For more information, see SMS Self-Service. Best practice recommends avoiding message splitting. The customer is responsible for following character limitations set for each country; for example, the maximum size in the U.S. is 160 characters.
5. The delivery result, if available, is recorded in Genesys.
6. Consumer may decide to respond to the SMS message. Genesys stores replies together with the available metadata from the SMS message to identify the consumer.
 - For a HELP keyword, a customer-specified help text is sent to the consumer.
 - For a STOP keyword, a customer-specified text is sent to the consumer, and the mobile number is added to a suppression list. It is the organization's responsibility to process the opt-out requests and guarantee that the consumer is not included in any further contact list.
 - ADD-ON: For a predefined keyword, the system can either send an automated response or trigger a RESTful API push into the customer's system (Genesys PS must scope API connections). For an unstructured/unexpected response, the system stores the response but does not reply unless a wildcard response has been configured (a wildcard response is a standard response that is sent as a response to all unrecognized responses).

Business and Distribution Logic

Business Logic

Contact Records – Batch Uploaded or Added On-Demand

Contact records are either batch uploaded (Self-Service FTP Automation or User Interface) or added on-demand via an API configured by the Customer Admin or Genesys PS based on the goals of the customer and the source of the contact. This configuration must be completed before the list is uploaded or contacts are added on-demand. There is no limit on the number of contacts.

Campaign Settings

One campaign is configured within the system. Customer Admin or Genesys PS can configure various campaign settings: start/stop timing, frequency of contact per consumer (Compliance Attempt Counter), contact pass strategy based on delivery receipt, mobile vs. landline filtering treatments, opt out, and help responses.

Text Message Content Template

Four self-service SMS templates can be used to create SMS messaging.

- Alert (Outbound): An outbound script used to send an alert to a contact list.
- Survey (Inbound or Outbound): A simple three-question survey script. Customers can respond with string, yes/no, or numeric (1-10) values.
- Opt-in (Inbound or Outbound): An inbound or outbound script that enables customers to use a simple keyword to opt in to SMS correspondence.
- Interactive (Inbound or Outbound): An interactive script with no required prompts. Keywords can be defined or changed for individual sub campaigns.

One custom template (Genesys PS) is used for compiling the SMS message. The template can be personalized by using up to four fields (such as customer name) from a third-party or customer database provided by the customer along with the list.

Suppression Lists

Suppression lists should include customers who have opted out of previous campaigns and a country-specific Do-Not-Contact list (if applicable). When a consumer opts out of a campaign, they should be added to a suppression list. Customers can also upload another suppression list or add an individual to an existing suppression list. These suppression lists can then be applied to future campaigns at the campaign level or at the overall account level. They can be optional or mandatory for each future campaign, as configured by the Admin.

Standard SMS Keywords

Standard keywords include STOP and HELP and variations, including: END, QUIT, CANCEL, UNSUBSCRIBE, OPTOUT, NO, STOPALL, STOP ALL, HLEP, HLP, and more. A list of keywords which triggers STOP or HELP scenarios are defined with the organization at the beginning of the project.

ADD-ON: It is possible to configure more keywords to detect an opt-out (STOP) or help request. These

keywords must be defined at the beginning of the project.

Distribution Logic

There is no applicable content for this section.

User Interface & Reporting

Agent UI

There is no applicable content for this section.

Reporting

Real-time Reporting

Uses Engage standard UI view for viewing real-time campaign metrics:

- List Size - The number of unique contacts in the active list.
- Filtered - The number of contacts filtered from the list based on suppression lists, compliance rules, or strategy filter criteria definitions.
- Delivered - The number of successfully delivered messages.
- Retrying or Failed - The number of contacts being retried or with a current failure status.
- Not Attempted - Records remaining in the list – unique contacts that are yet to be attempted.
- Done - Total number of contact attempts made.
- Remain - Total number of contact attempts remaining.

Historical Reporting

Engage Standard detailed reporting is available for viewing and exporting historical campaign metrics. There is a wide variety of built-in data points including:

- number of SMS attempts
- number of SMS messages filtered (due to suppression list, bad number, etc.)
- number of SMS messages delivered
- number of SMS messages failed (due to non-delivery by the carrier)
- number of inbound replies as result of campaign
- number of opt outs as result of campaign

Note: Reporting is not available in GI2 and GCXI.

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

Document Version

- Version **V 1.1.5** last updated **July 2, 2022**