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Genesys Multicloud CX Use Cases

Genesys Email Routing (CE16) for Genesys Multicloud CX

Important

Engage cloud Email replaces Email classic for Engage cloud and Engage cloud private edition customers.

Route email interactions to the best skilled resource

What's the challenge?

When customers take the time to send an email, they expect a quick, personalized response. But as the volume of email interactions increases, you struggle to provide timely and helpful responses. Trust in email as a reliable communication channel is declining among your customers and employees.

What's the solution?

Automatically distribute emails to the best-fit agent based on content analysis and keywords. Genesys Email Routing streamlines your response process using email automation functionality that enables you to monitor, measure, and optimize your email flow to create a better customer experience.

[Link to video](#)

Other offerings:

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Use Case Overview

Story and Business Context

Email is still one of the most reliable and desired ways for customers to interact with companies for support. It is an essential avenue for companies to serve and engage with customers while providing a consistent and positive customer experience. By routing to the best-fit agent, Genesys can improve handle time, first contact resolution, agent utilization, and customer satisfaction. To support your company's goals for the ideal customer experience, Genesys Multicloud CX Email enables automatic acknowledgments and routes the email to the appropriately skilled agent.

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:

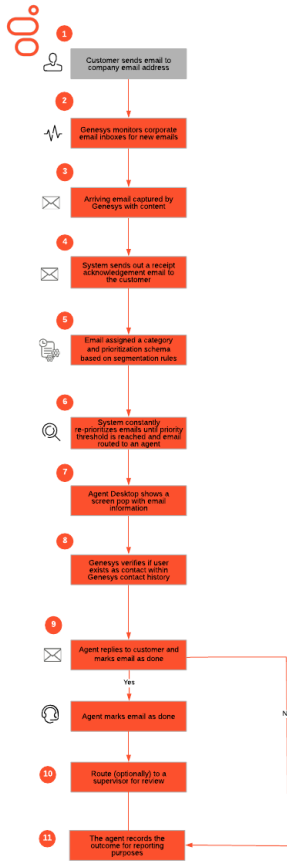
Use Case Benefits	Explanation
Improved Customer Experience	Addressing customers requests in a timely manner through skills-based routing improves Net Promoter Score
Improved Employee Utilization	Blending email with voice and chat allows agents to make better use of downtime between calls and chats to improve employee occupancy.
Improved First Contact Resolution	Direct interactions to an expert through skills-based routing improve First Contact Resolution.
Reduced Handle Time	Reduce handle time by routing emails to agents with the right skills.

Summary

A customer sends an email to a company via email address. The email is captured by the Genesys system, categorized and prioritized, and then queued to the best-skilled and available agent. If applicable, the agent composes a proper response, sends back the email answer, and dispositions the interaction accordingly. Quality review by a supervisor can be enabled if necessary. If the customer replies to the agent's email, the email can be routed back to the previous agent for consistency purposes. Reporting and analytics functionality is available to provide visibility into the email backlog and to help improve email handling and customer experience.

Use Case Definition

Business Flow



Cloud

Business Flow Description

1. A customer sends an email to one of the email addresses monitored by the Genesys Multicloud CX email solution (e.g. support@company.com).
2. Genesys periodically checks corporate inboxes for new emails, using Graph API, Gmail API or IMAP protocols.
3. The new email is captured by Genesys including "From," "To," "Subject" & "Body" as metadata. These contents are used to segment and prioritize.
4. The system sends out a receipt acknowledgment email to the customer using a predefined template.
5. The email is assigned a category based on segmentation rules set by the business. Each category is associated with a prioritization schema which assigns a priority score to the email to determine its place in the universal queue.
6. The system constantly re-prioritizes emails in the backlog as new emails come in. When the email reaches a priority threshold, the email is routed to the right agent to process this email.
7. The agent desktop application shows a screen pop with "From," "To," and "Subject" information.
8. Genesys verifies if the corresponding user exists as a contact within the Genesys Contact History (by email address). If the contact does exist, any available contact information and previous contact history is displayed. If the contact does not exist yet, Genesys creates the contact. The email and any response by the agent are attached to the contact.
9. Once the agent accepts and reads the email, they need to decide if a reply is needed.
 - If no reply is needed, the agent marks the email as done.
 - If a reply is needed, the agent creates an outbound reply email, potentially using a standard response template.
10. Optionally, emails can be routed to a supervisor for review. If the email is flagged for the supervisor review, the supervisor can take the following actions:

-
- Accept & send to consumer
 - Edit & send to consumer
 - Send it back to the agent for further review with comments

11. The agent can set a disposition code to mark the business outcome for reporting purposes.

Business and Distribution Logic

Business Logic

In the logical flows in the previous sections, there are various process steps driven by configuration parameters and additional business logic within the system. These parameters and the underlying logic are described in this chapter.

Capturing of Incoming Emails

In step 2 of the business flow, the Genesys system checks the customer's mailboxes for new emails (up to 100 mailboxes supported by default). The following configuration options are available:

- Address of email server
- Authentication details for mailbox
- Protocol for communication (Graph API, Gmail API, IMAP)
- Polling frequency (how often the mailbox is checked for new emails; default is 30 seconds)
- Maximum size of emails accepted by Genesys. Emails larger than this size are left in the mailbox and not captured by Genesys. (Max size is set to 66 MB by default. A larger email size requires approval, and additional charges may apply.)

Standard Responses

The Genesys agent desktop displays standard responses available to the agent, grouped by category. Standard Responses accepts parameters, such as Customer Name, which are filled in automatically when inserting the standard response into outgoing emails. The customer must provide the standard responses.

Available parameters for configuration by customer

The following lists the parameters used for the distribution logic. These parameters are configurable by category:

- Skill / skill level for the first, second, third, and fourth targets
- Supervisor skill / skill level for the first, second, third, and fourth targets
- Overflow timeouts for overflowing to skill-based routing and from overflowing between targets. These timeouts are based on age of interaction.
- Auto-acknowledge message

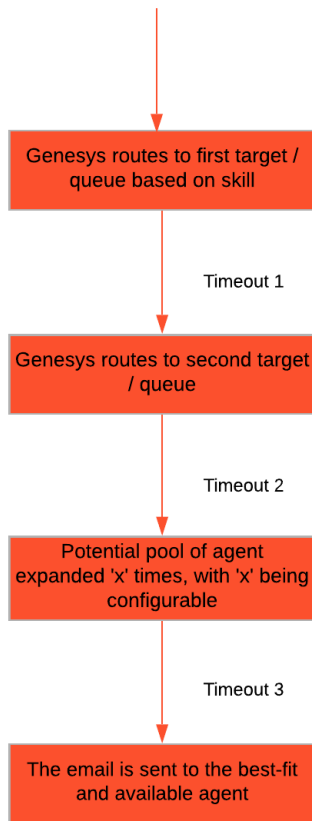
-
- View email in queue
 - Manage queue
 - Transfer email to agent
 - Manage email information in queue

Distribution Flow

The following flow describes the logic for the distribution of emails to the best skilled and available agent.



Designer application is invoked when email reaches priority threshold



Distribution Flow Description

1. The system checks for email in the customer's mailbox(es).
2. The email is assigned a category and prioritization schema based on business defined rules. The category is associated with a Designer endpoint. When the priority threshold is reached based on the prioritization schema, the Designer application is invoked to route the email to an appropriate employee.
3. The system waits for an agent to be available that matches the skill and skill level defined in the Designer application until a specified timeout is reached.
4. The potential pool of agents is expanded by reducing the requested minimum skill level. The system waits for an agent until a second timeout is reached.
5. The potential pool of agents is expanded by reducing the requested minimum skill level. The system waits for an agent until a third timeout is reached.
6. The potential pool of agents is expanded a final time by reducing the requested minimum skill level.

Distribution Logic

Draft Workbin

If the agent cannot complete an email, they can store the email in their personal workbin. When they need to access the email, they can pull it from their workbin and continue working on it.

Additional Distribution Functionality

Additional functionality for the distribution logic includes:

- Reroute on no answer (RONA): If an agent does not accept the email interaction, the email interaction is automatically put back into the distribution flow after a time-out. The agent is set to not-ready.
- Blending with other media types is possible.
- Transfers are possible to agents satisfying the skills of another category.

User Interface & Reporting?

Agent UI

The following lists the minimum requirements for the agent desktop:

- Access to Universal [Contact History](#)
- Configuration of [not-ready](#) reason codes (Admin Work, Lunch, Meeting, Pause, RONA, and Training).
- Configuration of [disposition codes](#) (Cross Sell, Need Follow Up, Not Right Skill, Processed, Terminated, Transferred, Up Sell)
- Access to [standard response](#) library
- Agent to Agent [transfer](#)
- Agent to Queue transfer
- Store draft email in personal [workbin](#)
- Interaction Queue Management for [supervisors](#)

Reporting

Real-time Reporting

iWD Manager's Dashboards Tab is the new interface for real-time dashboards on your email backlog. It gives you several options for displaying dashboards for monitoring the state of email controlled by iWD: by backlog, by volume, by SLA, by categories, by timing, and by path. For more information on the available dashboards in the Dashboards Tab, visit [here](#).

Pulse is a Genesys application that offers personalized dashboards based on specific functional, organizational, or geographical needs. Pulse dashboards present information using graphical "widgets" that can be used as graphs or

tables, showing information about specific key performance indicators, such as service level, email interaction handled, and the average handle time. With Pulse you can:

- Monitor the current state and activity of your agents to help decide about staffing, scheduling, and call routing strategies.
- Create widgets from predefined and user-defined templates for a fast and easy text or graphical presentation of selected or user-defined object statistics.
- Predefined templates:

Display Alias	Description	Display Format
Login Time	The total time that monitored agents were logged in. Applied to GroupAgents and GroupPlaces, this statistic type calculates the total login time for all the agents belonging to the specified group.	time
Ready Time	The total time this agent spent waiting for the next email.	time
Not Ready Time	The total time this agent spent in a not Ready status for email media.	time
% Email Occupancy	The ratio of time handling email sessions to the total login time of the Agent.	percent
Ringing Time	The total amount of time that email pop-up was alerting the agent desktop.	time
Handle Time	The total amount of time the agent spent handling email (The duration is not restricted to the agent focus time).	time
AHT	The average amount of time the agent spent handling email (The duration is not restricted to the agent focus time).	time
Offered	The total number of emails that were offered for processing to this resource or agent group during the specified period. This statistic type counts interactions both offered by business routing strategies and other agents.	integer
Offered (hr)	The total number of emails that were offered for processing to this resource or agent group during the specified period. This statistic type counts interactions both offered by business routing strategies and other agents.	integer

Display Alias	Description	Display Format
% Accepted	The percentage of emails accepted by the agent based on total of emails proposed.	percent
% Rejected	The percentage of emails rejected by the agent based on total of emails proposed.	percent
% Missed	The percentage of emails missed by the agent based on total of emails proposed.	percent
Accepted	The total number of emails that were offered for processing and that were accepted during the specified period.	integer
Accepted (hr)	The total number of emails that were offered for processing and that were accepted during the specified period.	integer
Rejected	The total number of emails that were offered for processing and that were rejected during the specified period.	integer
Rejected (hr)	The total number of emails that were offered for processing and that were rejected during the specified period.	integer
Missed	The total number of emails that were offered for processing and that were missed during the specified period.	integer
Missed (hr)	The total number of emails that were offered for processing and that were missed during the specified period.	integer
Done	The total number of inbound emails that were terminated by an agent or agent group during the specified period.	integer
Done (hr)	The total number of inbound emails that were terminated by an agent or agent group during the specified period.	integer
% Done	The percentage of emails terminated by the agent based on total of emails proposed.	percent
% Trans Made	The percentage of emails transferred to another agent based on total of emails proposed.	percent
Transfers Made	The total number of email transfers made by this agent or agent group during the specified period. Applied to GroupAgents or GroupPlaces, this statistic type calculates the total number of transfers made by all agents belonging to the respective	integer

Display Alias	Description	Display Format
	group. This statistic type counts each transfer instance separately including those transfers where the agent transfers the same interaction more than once.	
Unsolicited sent	The total number of emails sent by the agent without being solicited by customers.	integer

Note: Pulse does not have any dedicated email reports. It only provides agent-specific reports and dashboards.

Historical Reporting

Genesys CX Insights (GCXI) provides customizable reports and dashboards that can help you track the benefits of this use case by analyzing historical data KPIs that illustrate the routing and handling of interactions.

Some of the most relevant reports that are useful to measure the effectiveness of the engagement rules and efficiency of the use case are found in the **Email** folder, including:

- **Agent Summary Activity Email Report** — Examine a breakdown of the duration of the different agent states (Ready, Not Ready, Busy, and Other) for a specific media type, fully accounting for the agent's interaction time (time spent handling interactions).
- **Agent Utilization Email Report** — Learn about agent activity when handling email, including, for each agent, the average time to handle an interaction, the number of offered email interactions, the number rejected, and the number and percentage of accepted and transferred interactions.

Other reports relevant to this use case include:

- **Interaction Handling Attempt Report** — Explore segment-related details regarding an agent's handling of contact center interactions that are stored in the Info Mart INTERACTION_RESOURCE_FACT table. This includes both the time that was required to distribute the interaction to the agent, and data about the agent's contiguous participation in the interaction.

Additional historical reports can be found in the **CX Insights for IWD folder** by filtering for the Email media type.

For more information about the Genesys CX Insights reports, see [Get started with Genesys CX Insights](#).

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

All of the following required:	At least one of the following required:	Optional	Exceptions
		Digital <ul style="list-style-type: none"> Genesys Work and Lead Distribution (BO02) 	

General Assumptions

- Mailboxes supported: Gmail, O365, and Microsoft Exchange.
- Protocols supported: Graph API, Gmail API, IMAP/SMTP.
- Workspace Web Edition is used as agent desktop.
- iWD Manager's Dashboards Tab is used for real-time email backlog dashboards.
- Genesys IWD DataMart and GCXI in place for historical reporting.
- Pulse is used for agent specific real-time reports.

Customer Responsibilities

- Genesys captures emails from the corporate email server. The customer is responsible to configure the email server appropriately so Genesys can check for and retrieve new emails in 30-second intervals.
- Spam filtering and email blacklisting is to be handled by the customer at the level of the corporate email server. Spell check is performed by the customer's web browser. No functionality related to spam, blacklisting or spell check are included within the Genesys implementation.

Related Documentation

Email configuration

Engage cloud Email uses Intelligent Workload Distribution (iWD) Manager to setup mailboxes and segment emails, Designer for the routing strategy, and standard response library stored in UCS. Agent Setup is used to customize additional outbound email address option for agents.

- Email channel options
- Getting Started with Designer

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- Creating standard responses (eServices Manager)
 - Creating standard responses (Designer)
-

Email interactions

Agent Desktop handles email interactions for agents and supervisors.

- Email for agents
 - Email for supervisors
 - Standard responses for agents
-

Document Version

- Version **V 1.1.5** last updated **November 28, 2021**