



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 Multicloud CX Use Cases

Genesys Messaging (CE34) for Genesys Multicloud CX

11/28/2021

---

Offer a powerful new way for customers to connect with you directly in Messages

## What's the challenge?

To engage customers on their devices, enable seamless experiences, build brands and reduce service and support costs using mobile messaging channels. Pain points include increased customer frustration due to failure of carrying context across channels and rising costs due to increased calls to agents.

## What's the solution?

Using Genesys Messaging to support continuous, personalized conversations with integrated agent assistance and persistent history of contact, bringing new levels of scalability, consistency, and responsiveness to messaging interaction strategies

### **Other offerings:**

Genesys Cloud Genesys Engage on-premises

## 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 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 Agent Desktop](#)
    - [7.2 Document Version](#)

---

## Use Case Overview

### Story and Business Context

In today's digital world, telephone calls aren't always the best or desired way to communicate with businesses because they are not visual and require a synchronous live interaction. Consumers want a simple, convenient method of communication through the channel of their choice and according to their own schedule. Third-party messaging applications are a popular communication option that consumers have come to expect as a way to interact with companies. In addition to that, social media channels like Facebook Messenger is popular for customers to use to communicate and interact with companies due to their vast availability, influence, and convenience. Customers use social media to share information about products and services, and they frequently follow and review companies with whom they do business.

WhatsApp beta enables two-way conversations between consumers and businesses on familiar mobile devices and provides a feature-rich, flexible, and convenient method of answering questions, solving problems, and making purchases all through a single messaging conversation. The long-lived, asynchronous nature of the conversation means that the consumer and contact center agent can return to the conversation at any time with a full history.

This use case enables businesses to handle WhatsApp conversations in their Genesys contact center environment. Businesses must sign up with the Messaging provider, choose Genesys as their customer service platform provider, and get their use cases approved by the Messaging Provider to be part of the ecosystem.

To increase successful self-service interactions, a chatbot can be used over these messaging channels to automate the conversation with the customer, this chatbot allows the customer to seamlessly transfer to a contact center agent if and when needed. See use case Genesys Chatbots (CE31) for Genesys Multicloud CX for details and limitations of incorporating chatbots with Genesys Messaging offerings. When companies enable WhatsApp as supported customer service channels within their Genesys environment, benefits can include:

- Improved first contact resolution and reduced handle time by matching every consumer with the agent best equipped to respond through skills-based routing
- Improved NPS by carrying context across channels and matching the consumer with an appropriately skilled agent, similar to how all Genesys channels are managed
- Reduced costs by granting agents the ability to manage multiple chat conversations simultaneously and blend messaging conversations with other media types in the same agent desktop
- Continuity in asynchronous conversations, enabling consumers to make contact when convenient throughout the day, week, or buying or service journey
- Workforce management and reporting integrated with the rest of the contact center
- Improved brand perception by offering new channels that are expected to be heavily promoted by WhatsApp
- Convenience for consumers in using familiar messaging app as opposed to having to open a separate chat window

### 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	Carry context across channels and match the consumer with an appropriately skilled agent. Provide continuity in asynchronous conversations by enabling consumers to make contact when convenient throughout the day, week, or buying or service journey. Make it convenient for consumers by using familiar messaging apps as opposed to having to open a separate chat window.
Improved First Contact Resolution	Match every consumer with the agent best equipped to respond through skills-based routing while reducing handle time.
Reduced Administration Costs	Reduce costs by granting agents the ability to manage multiple chat conversations simultaneously and blend messaging conversations with other media types in the same agent desktop.

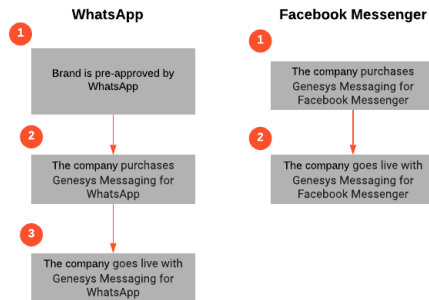
## Summary

A consumer can initiate a conversation with a business directly in WhatsApp (or) Facebook Messenger. They typically do so by clicking a link or a call-to-action button to connect to WhatsApp (or) find the Facebook page of the business and send a quick message. These conversations are delivered to a company's contact center through the Genesys Messaging service. The conversation can be automated with a chatbot or human-assisted with a contact center agent. These engagements become persistent and long-lived (asynchronous), but can be handled live (synchronously) when necessary. During the conversation, the bot or agent can present rich messaging elements, such as WhatsApp Notifications to offer feature-rich capabilities that make it convenient for the consumer to resolve their issue, get their question answered, or complete a transaction.

## Use Case Definition

### Business Flow

### Approval Flow



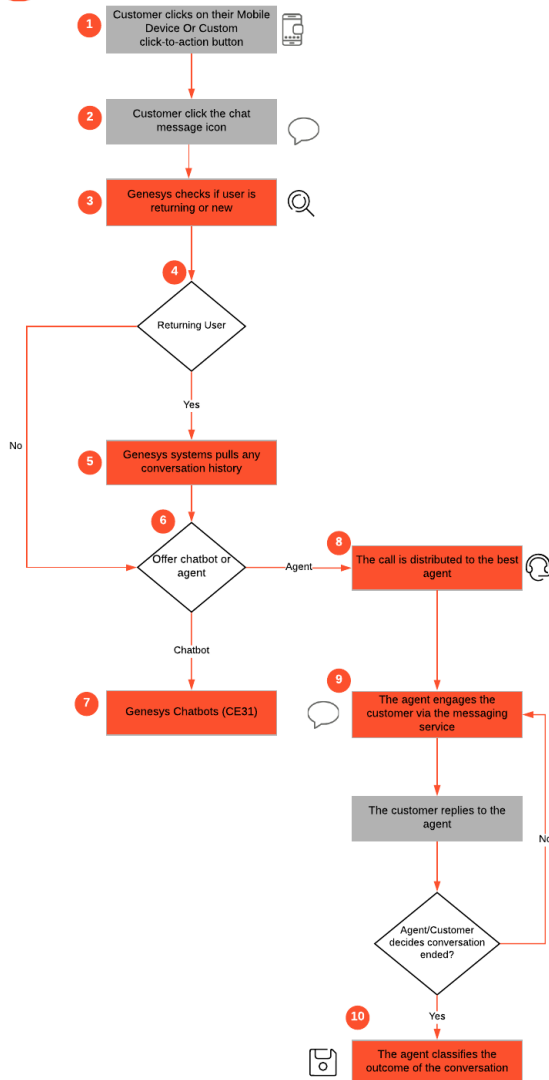
## Business Flow Description

- The brand must be pre-approved by WhatsApp before they can engage with and get on-boarded to Genesys. We can help with pre-approvals. Purchasing, or expressing an interest in, Genesys Messaging for WhatsApp from us does not mean that a brand is pre-approved for WhatsApp by us.
  - \* The brand purchases Genesys Messaging for WhatsApp (including Hosting Fees and Incidental sellable items) from Genesys, uses the on-boarding guide to get their channels set up in Genesys Hub, and begins development of the messaging use cases.
  - \* The brand can go live with Genesys Messaging for WhatsApp. While in beta, WhatsApp might want to validate the brand's implementation before allowing them to go live.
- No approval is needed for Facebook Messenger.

---

Business Flow

Messaging Flow



## Business Flow Description

1. The brand invites their customer to initiate a conversation via messaging (for example, via a custom Click to Action button in their app, on their website, or in an email). For Facebook Messenger, the customer finds the brand's page and sends a message to initiate an interaction.
2. The customer clicks the chat message icon and sends an initial message to begin the conversation.
3. The Genesys system checks to see if it can recognize the customer.
4. WhatsApp passes the phone number of the customer to help identify who initiated the conversation. Facebook passes the Page Scoped ID that is unique for every customer reaching out to that page.
5. For customers who have initiated a conversation previously, the system pulls the conversation history and presents it to the agent.
6. The Genesys system determines whether to offer an automated chatbot to the customer or route the customer to a contact center agent.
7. If a chatbot is offered, go to the use case .
8. If routed to an agent, the customer and agent begin a conversation.
9. Depending on the conversation topic, the agent can send the customer various interaction types in addition to text, emojis, and images. Pre-approved (by WhatsApp) notification templates can be sent to the customer (see below).
10. Customer and agent interact via the messaging service and after the conversation is complete, the agent dispositions the interaction.

**For WhatsApp**, the agent can also send pre-approved WhatsApp notification templates. These can be free or paid.

- Using these interaction types can save time for agents and reduce errors from the customer. Agents can choose these templates from the standard response library so they don't have to assemble pick lists on-the-fly.



- 
- After the conversation between an agent and a customer, the agent can classify the chat for reporting purposes via the agent desktop.

## Business and Distribution Logic

### Business Logic

Users should never receive unsolicited messages and must have control over the conversation.

Important:

WhatsApp:

- A brand has 24 hours to respond to a consumer. Within that timeframe, bots and agents are allowed to send as many templated or free-form messages as they want. Any response by the consumer resets that 24-hour limit.
- Once the 24-hour limit has expired, only paid WhatsApp approved template messages (called "paid notifications") can be sent until the consumer responds. Once the consumer responds, another 24-hour window opens for agents, bots, and the consumer to communicate
- Paid notifications: WhatsApp charges for each notification sent based on the consumer's phone number. Their rate card is published on WhatsApp's website.

### Distribution Logic

- WhatsApp passes the consumer's phone number that was used to send the message from, allowing the brand to identify the consumer.
- Facebook sends PSID (Page Scoped ID) that is unique for each customer reaching out to that page.

## User Interface & Reporting?

### Agent UI

Agents must have the following capabilities:

- Customer **history** is displayed to the agent upon interaction arrival. Agent can scroll back through previous conversations to initial interaction.
- Agent can send paid notifications in **WhatsApp**.
- Agent **can send a message** with Text, Emoji, and Image.
- Agent can receive a message with Text, Emoji, Image, Video, Audio, and Location.
- Agent can pivot to another **channel** and preserve the context of the interaction.

---

## Reporting

### Real-time Reporting

**Genesys Pulse** enables at-a-glance views of real-time contact center statistics through dashboards and wallboards.

Each Genesys Pulse report presents information within graphical widgets, which show graphs or tables that provide information about incoming voice call queues, agent groups, or individual agents. You can personalize Genesys Pulse reports based on functional, geographical, or organizational considerations.

Genesys Pulse provides templates for the most popular reports. You can use these templates to quickly add report widgets to your dashboards.

The following Genesys Pulse standard reports are particularly relevant for this use case:

- Chat Agent Activity — Presents agent or agent group activity as it relates to the processing of chat contacts.
- Chat Queue Activity — Allows you to monitor Chat Queue Group activity.
- Facebook Media Activity — Presents agent or agent group activity as it relates to the processing of social media interactions.

For more information, see [Standard Report Templates](#) for more information.

### Historical Reporting

GCXI is required for this use case. GI2 does not support this use case.

All existing chat reports can be used for Messaging as well. Just filter by Media Type (Facebook session and/or WhatsApp session) to report on a specific or all messaging channels.

## 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>Digital</b> <ul style="list-style-type: none"><li>• Genesys Social Media Routing (CE19)</li></ul>	None

All of the following required:	At least one of the following required:	Optional	Exceptions
		<b>Self-Service and Automation</b> <ul style="list-style-type: none"> <li>Genesys Chatbots (CE31)</li> </ul>	

## General Assumptions

- This use case requires both Workspace Web Edition 9 and Designer 9. It does not work with previous versions of WWE or Designer.
- For reporting, GCXI is required. The use case does not work with GI2
- Apple Business Chat is not available in Genesys Multicloud CX
- Facebook Messenger**
  - Customer has 24 hours to respond to bots and agents from the time stamp of the last message from the brand, beyond which, only agents are allowed to send any follow-up messages by adding a Human\_agent tag.
- WhatsApp**
  - A brand can try to channel-switch a consumer by sending them an opt-in message or offering them a Call-to-Action. Interacting with these counts as an opt-in. Examples of calls to action include:
    - Click-to-action button on the brand's website
    - Link in email signature
    - Sending customer an SMS with an offer to switch to WhatsApp
    - IVR offering to channel-switch to WhatsApp after verifying that the customer is on WhatsApp. Within the first 24 hours after the consumer contacted the brand, agents, or bots can post to the consumer as often as they want.
    - After 24 hours, regular messages by agents or bots are rejected. Instead, the brand has to send a pre-approved notification message (also referred to as HSM, or Highly Structured Message) and the brand has to pay for the message. Paid messages are billed to Genesys, and Genesys bills the brand monthly for each message based on the rates published by WhatsApp. See WhatsApp Rate Card (rate card) and also WhatsApp's reference for more guidance regarding what kind of messages are allowed.

---

## Related Documentation

### Agent Desktop

The Agent Desktop Workspace lets contact center agents and supervisors communicate with customers and team members through phone calls and Outbound Campaigns and Genesys Digital channels.

[Agent Desktop 9 Help](#)

[How Agent Desktop Works](#)

---

## Document Version

- Version **V 1.0.0** last updated **November 28, 2021**