

Genesys Engage Cloud Use Cases

Genesys Personalized Routing with Callback (CE43) for Genesys Engage cloud

7/26/2021

Important

This use case consolidates capabilities previously documented under Genesys Call Routing (CE01) for Genesys Engage cloud, Genesys Personalized Routing (CE02) for Genesys Engage cloud, and Genesys Callback (CE03) for Genesys Engage cloud.

Route voice interactions to the best skilled resource with personalization and callback option

What's the challenge?

When customers call you, they want to speak with someone familiar with your company, someone who can quickly address their needs. If they encounter long wait times or connect to agents who lack the proper information, then calls can transfer more often, hold times increase, and the customer experiences unnecessary repetition. Any of these factors can result in a poor customer experience.

What's the solution?

Proactively address the needs of your customers when they call into your contact center, which helps drive a greater customer experience. Recognize repeat customers and route calls either to the last agent they spoke with, or to the best-skilled agents that can more effectively help address their needs. If no agents are available to address their needs appropriately, let them know their expected wait time, and offer a callback option.

Other offerings:
Genesys Cloud

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Use Case Overview

Story and Business Context

You want to provide an exceptional customer and sales service experience by reducing transfers, hold time, and frustration from repeated customer interaction with your company. Advanced routing capabilities improve efficiency and reduce hold times by sending interactions to the right agent using skills-based routing, preferred agent routing, customer context, and in-queue callbacks. Detailed routing behavior is driven by configuration parameters and data tables, providing a flexible framework to adapt to specific organization needs. The underlying logic is based on experience and best practices from previous implementations and therefore enables the organization to use best practice scenarios to enable fast realization of benefits. The callback capability enables companies to improve the customer experience by empowering their customers to choose a callback when wait times are long.

When companies enable call routing within their Genesys environments, benefits can include:

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	Improve the customer experience by proactively addressing the needs of the caller. Find the agents most familiar with the customers needs, or someone who has worked with the customer in the past.
Improved Employee Utilization	Ensure that more informed agents can handle customer inquiries more quickly, which enables them to handle more calls effectively and efficiently.
Increased Revenue	Ensure that the best and most skilled agents handle calls matched to their strength, increasing the opportunity to close a sale or upsell other products, which can lead to increased revenue.
Reduced Handle Time	Reduce costs and deliver exceptional customer experience by routing customers to the most appropriately skilled agents who can handle their queries more efficiently.
Reduced Interaction Abandonment	Provide clear wait times and callback options to decrease abandonment.
Reduced Transfers	Reduce the number of transfers with context-based routing which finds the best agents first.
Reduced Volume of Interactions	Decrease inbound calls from individual callers repeatedly trying to initiate contact.

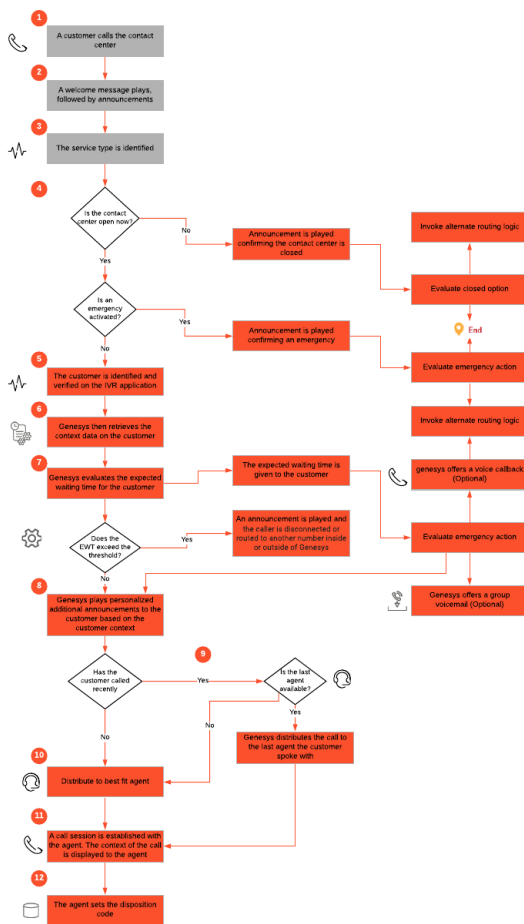
Summary

Creating a great experience for the customers and prospects that call into your contact center is paramount to creating long-lasting business relationships. The experience starts when callers encounter your IVR, where you present them with simple options to identify themselves or self-serve to reduce their time on the phone and help inform the system to make the best routing decision. The system checks for hours of operation, special days, and emergencies, and then plays corresponding messages. When information about a caller exists or a customer enters an account number, the system personalizes announcements that the customer hears or routes them to the last agent with which they interacted. If not enough agents exist to respond to callers in a timely manner, the system can automatically expand the pool of available agents to answer the call more quickly and present relevant content about the caller to an agent. If no agents are available, the target expands to include an additional agent skill or skill-level. When wait times are long, the system can also offer a callback option for customers to save their place in line until an agent becomes available and can call them back. After the initial implementation, customers can enhance the service with more Genesys routing capabilities.

Use Case Definition

Business Flow

(1) Inbound Call Flow



Business Flow Description

1. The customer calls one of the contact center numbers.
2. A welcome message is played, followed by generic announcements.
3. The service type is identified using a call steering DTMF menu or (optionally) an IVR application.
4. Depending on the service type, if the customer is calling outside of or while an is in progress, an announcement is played. The customer can then be reconnected or diverted to another number inside or outside of your Genesys environment.
5. The customer can be identified using the CLI or (optionally) the use case (which eventually also provides customer verification).
6. Based on the customer identification, customer context data can be added to the interaction. If the contact center is open, the routing parameters for this particular call are set based on the type of request and the customer context. This context enables flexible and personalized call handling.
7. Optionally, the Expected Wait Time (EWT) for the customer is calculated and announced to the customer. If the EWT exceeds a specific threshold, an announcement is played and the caller is disconnected, routed to another number, or offered the option to receive a callback.
8. Based on the customer context, the customer hears other announcements, such as quality announcements, special promotions, or announcements for potential self-service options.
9. If the customer has been calling recently for the same type of request, Genesys can . If that agent is not available within a specified time-out, the call is routed to the requested skill.
10. The call is who:
 - Has the base skills to handle the original request, or
 - Has supplementary skills such as upselling a defined product, service to the customer, or specific empathy skills based on the customer segment or demographic.

A enlarges the potential agent pool by suppressing the supplementary skill or reducing the skill level on the base skill if the

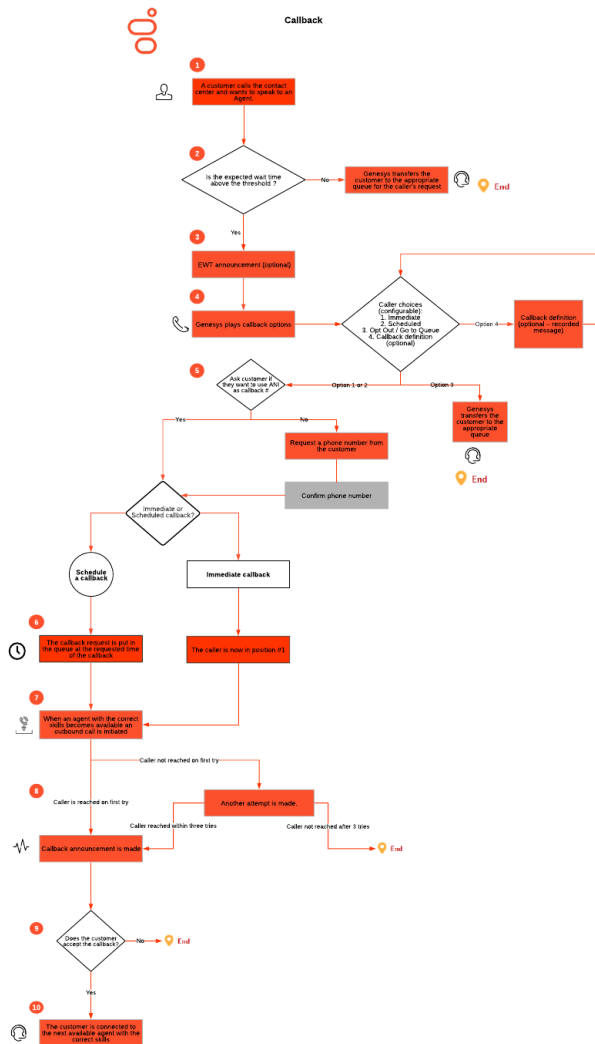
call cannot be distributed within specific timeouts.

11. Once the call is , the agent views the context information. For example, the agent can see any special offers or promotions that are available for that customer. The agent handles the customer request and any potential up-/cross-sell opportunities.
12. When the conversation with the customer ends, the agent records the outcome of the call for reporting purposes (for example, if they acted on the presented lead).

Business Flow

(2) Request a callback

If wait times are too great, the caller can request a callback.



Business Flow Description

- A customer calls the contact center during regular office hours and wants to speak with an agent.
- The system verifies the expected wait time for the particular request. If the wait time is below the specified thresholds or within the optional blackout period, the caller is immediately transferred to the corresponding queue to wait for an agent with the requested skill.
- When the Estimated Wait Time threshold is reached outside the optional blackout period, the wait time can be announced to the caller (optional). It's best to offer the wait time as a range, rather than an exact value; for example, "Your wait time is between 15 and 20 minutes".
- When , a menu is played to offer the caller an or Callback. Optionally, the callback offer can include a description of callback. The caller also has the option to refuse the callback offer, in which case the call stays connected, the caller remains on the line, and the call is transferred to the corresponding waiting queue.
- When the customer chooses to receive a callback, the system requests confirmation that the ANI on which they called in is the one to use for the callback.
 - If the customer does not confirm the ANI on which they called in as the one to use for the callback, then they are asked to enter the new callback number and to confirm it.
 - If the customer confirms the ANI, the call progresses:
 - For a Scheduled Callback, the customer is asked to select a day and time.
 - For an Immediate Callback, the call is placed in the router's queue.
- For an Immediate Callback, the customer's call remains in queue until it reaches the top of the queue. For a Scheduled Callback, the call is queued at the time requested for the callback.
- If the customer accepted a callback option, the system makes the outbound call to the customer when the customer's call reaches the top of the queue and an agent with the required skills enters the Ready state. The agent that triggered the callback is not reserved, though, and might take

another call while the system tries to reconnect with the customer.

- to agents is based on agents' skills. The required skills for a callback request depend on the type of request and the language. The mapping between subject and skill is configurable.
 - Settings such as skill expressions and the optional blackout period are configured for each callback queue in the in Designer.
8. Up to three attempts are made to connect with the customer. The maximum number of times to attempt the outbound call is configured for each callback queue in the .
- If the customer does not accept the request after the third attempt, then the callback is cancelled.
 - If the customer accepts the call, then call progress detection is used to detect if a human has accepted the call. An announcement is played to inform the customer that this is the callback he or she requested.

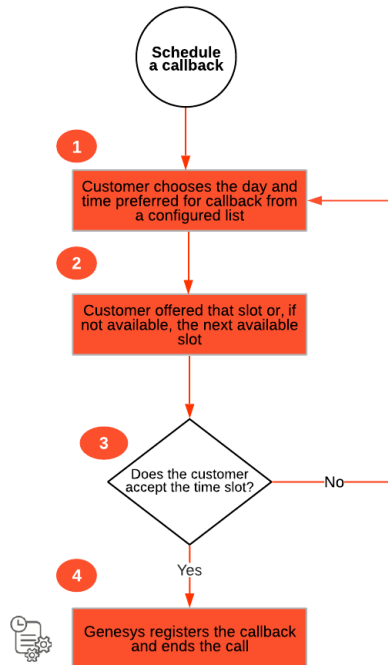
Business Flow

(3) Schedule a callback

The caller can specify a callback time.



Scheduled Callback



Business Flow Description

1. From a selection of configured days and times, the customer chooses the day, then the time, for their callback. For information about configuring business hours, see . For information about using those business hours to schedule callbacks, see .
2. If the time slot is available, the system will confirm it. If the time slot is not available, the system will offer the next available time.
3. The customer can accept the offered time slot. If the customer does not accept the next available time slot, they are asked to enter a day and time again. This loop will occur 5 times (5 is the default, and this is a configurable option).
4. Once the customer accepts the time slot, Genesys registers the callback request and ends the call.

Business and Distribution Logic

Business Logic

General Routing Functionality

The business logic and business rules drive routing decisions. Users can configure various operational parameters related to routing logic, including the target skills for each menu option, priority tuning, timers, and overflows.

The following sample list of the business parameters provides an overview of the flexibility in the configuration of the routing logic:

- Settings that are specific to the business operations of your contact center, such as defining Business Hours, Special Days, Emergency Flags, and the related prompts, messages, or announcements to play for each event.
- Expected Wait Time (EWT) is monitored to determine when a customer can speak with an agent. If the wait time exceeds a certain threshold, the caller can be offered an alternate option, such as callback.
- Settings that specify how the call is to be routed, such as by agent skill or the last called agent that the customer spoke with.
- "Busy" Treatments, such as messages or music, to play to customers while queuing their calls.
- Agents can transfer interactions to defined internal agent groups or business lines (route points). The routing logic defined for these route points is similar to the routing logic defined above (without initial announcements). Only transfer route points are visible to the agent in Agent Desktop.

Callback Offer and Registration

When the voice application business rules include offering callback to customers, businesses configure operational parameters such as the acceptable estimated wait time (EWT) in queues, callback-specific announcements, and a blackout period for Immediate callback offers. Before transferring a call to the queue that matches the caller's request, the voice application verifies the estimated wait time (EWT) in the queue. The returned wait time is checked against user-specified settings.

Sample business rules for offering callback can include:

- When the EWT is less than the threshold configured for offering callback, then the call will be automatically transferred to an inbound queue. The logic and business rules to distribute the call to an agent from this queue are not part of the scope of this use case.
- If the EWT is greater than the configured threshold, but not so large as to put the call within the optional blackout period, then the system can play a generic message or announce the EWT to the customer and offer Immediate or Scheduled Callback. The specific behavior is based on configuration.
- If the EWT is greater than the configured threshold and is long enough to put the call within the optional blackout period for Immediate Callback, then a generic message is played before offering Scheduled Callback to the customer.

Callback

Callback logic is configured in Designer applications. For information about provisioning Genesys Callback, see [Provisioning Callback in Designer](#).

The configurable parameters for callback functionality include:

- Time slots for scheduled callback.

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- Business hours and special days for the callback service.
 - Maximum number of connection requests per time slot (the number will be the same for all slots)
 - Voice prompts for announcements or treatments for the callback. For example, an administrator can specify which announcement to play when the customer is connected, the treatment to use while the caller is waiting for the agent to be connected, and the announcement to play when there continues to be no agent available after a certain waiting period.
 - Priority for callback requests. This is important when this use case is used in combination with other inbound media types (for example inbound calls or email). All callback requests will have the same priority.

For information about configuring callback functionality, see [Callback V2](#).

Parameters are configurable by request type. The type of request is determined by the point in the IVR where transition from self-service to assisted service is required.

User Interface & Reporting?

Agent UI

Agent Desktop provides a suite of out-of-the-box and configurable features to enable you to maximize routing:

- Agents can view the menu selection (service) and/or the DNIS when a call is **routed to them**
- Agents can **transfer calls** to other individual agents and specific route points enabled for the agent.
- Configuration of **not-ready reason codes** (for example, Admin Work, Lunch, Meeting, Pause, RONA, and Training).
- Configuration of **disposition codes** for reporting of business outcome (for example, Cross Sell, Need Follow-Up, Not Right Skill, Processed, Terminated, Transferred, Up Sell). Agents select the disposition while handling the interaction

Call Outcome / Disposition Code

If a lead is presented to the agent, the agent can classify the outcome within the agent desktop. This outcome includes the information whether the lead has been actioned. The data if a lead has been actioned is stored in Context Services to enable rules that it is not presented to an agent again. Also, the call outcome is used for reporting purposes. Up to 10 different call outcomes/disposition codes are configured.

Context Data

The following data is displayed when a call is distributed to an agent:

- Context Services Data
- Customer language
- Time in IVR and in Queue
- ID & V Status
- ID or ID & V required for service?
- Indicator if a special promotional message has been played

ID&V

The agent is able to handle manual Identification and (optionally) Verification if necessary for the specific customer request. The ID&V is handled in an application outside Genesys. However, it is possible for the agent to update the ID&V status of the call. In this case, the call data is updated and if the customer has not been identified before, the customer-related data from Context Services is retrieved and displayed to the agent.

Reporting

Real-time Reporting

For information about real-time reporting for callbacks, see [. Callback activity is tracked as part of the \[. You can that is based on the Callback Activity template to your Pulse dashboard.\]\(#\)](#)

Historical Reporting

Genesys CX Insights (GCXI) provides customizable reports and dashboards that can help you track the benefits of this use case. The metrics and attributes in these reports measure and filter Info Mart data based on interaction-related activities conducted by active agents, on the agent queue(s) through which customer interactions pass, and on Business Attributes attached data. They enable you to examine low-level interaction details, including handling attempts, flow, and transfers.

Some of the most relevant reports include:

- — Provides a breakdown of the duration of the different states that an agent can be in (Ready, Not Ready, Busy, and Other).
- **Agent Performance Dashboard** — Provides at-a-glance key information about agents, focusing on metrics related to handle time and agent conduct.
- **Agent Utilization** — Provides detailed information about agent performance regarding the customer and consults interactions that are processed within the contact center for a range of days that you specify, and illustrates the percentage of interactions accepted by agents.
- **Queue Outline Report** and **Queue Summary Report** — Collect detailed counts related to customer interactions and consult interactions, showing how the number of interactions/consultations that entered a particular queue or queue group breakdown into the various queue-related metrics. these metrics provide interaction counts, including abandoned, or distributed and handled by any routing target, such as an agent.
- **Interaction Handling Attempt Report** — Summarizes segment-related details regarding agent handling of contact center interactions.
- **Transfer Detail Report** — Learn more about the initiating and receiving parties of those contact center interactions that involve a transfer including the technical result, the mediation devices through which the interaction passed, the business attribute, and the entire duration of the interaction.
- Other reports relevant to this use case are found in the **Agents**, **Business Results**, **Detail**, and **Queues** folders.

For information about Callback historical reporting, see [, \[, and in \\[.\\]\\(#\\)\]\(#\)](#)

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	Self-Service and Automation <ul style="list-style-type: none">• Genesys Customer Authentication (CE07)	None

General Assumptions

You can provide your own call qualification & customer identification (ID&V) or use use case CE07, Effective Identification & Validation in IVR.

Customer Responsibilities

- You can use text-to-speech in Designer to create announcements, or record your own.
- Context Routing requires timely access to external (non-Genesys) customer data through a REST API.

Related Documentation

Designer

Designer is a web-based tool for developing self-service (IVR) and assisted service (routing) applications. It is an omnichannel solution, enabling you to craft applications that are capable of handling voice, chat, and email interactions.

- How routing works
- Getting started with Designer

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- [Setting up the Callback V2 block](#)
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Callback

When the wait time to speak to an agent is long, customers can request a callback. A callback can be immediate – the caller can drop but the call is maintained in-queue until it reaches the top of the queue – or a customer can choose to schedule a callback for a specific day and time that is convenient.

- [How callback works](#)
 - [Provisioning Callback in Designer](#)
 - [Getting started with the Admin UI](#)
 - [Supported callback scenarios](#)
 - [Managing callbacks](#)
 - [Monitor callback queues](#)
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Agent Desktop

Agent Desktop enables agents to handle routed interactions, transfer interactions, and set interaction disposition.

- [Agent Desktop 9 Help](#)
 - [How Agent Desktop Works](#)
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Document Version

- Version **V 1.0.0** last updated **July 26, 2021**