Genesys Engage On-premises Use Cases
## Table of Contents

### Digital

<table>
<thead>
<tr>
<th>Service</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Genesys Digital</td>
<td>7</td>
</tr>
<tr>
<td>Genesys Work and Lead Distribution (BO02) for Genesys Engage on premises</td>
<td>10</td>
</tr>
<tr>
<td>Genesys Task Distribution-Workgroup (BO03) for Genesys Engage on premises</td>
<td>28</td>
</tr>
<tr>
<td>Genesys Personalized Task Distribution (BO04) for Genesys Engage on premises</td>
<td>37</td>
</tr>
<tr>
<td>Genesys Dynamic Case Management (BO11) for Genesys Engage on premises</td>
<td>46</td>
</tr>
<tr>
<td>Genesys Email Routing (CE16) for Genesys Engage on premises</td>
<td>71</td>
</tr>
<tr>
<td>Genesys Chat Routing (CE18) for Genesys Engage on premises</td>
<td>89</td>
</tr>
<tr>
<td>Genesys Social Media Routing (CE19) for Genesys Engage on premises</td>
<td>102</td>
</tr>
<tr>
<td>Genesys Personalized Digital Routing (CE20) for Genesys Engage on premises</td>
<td>118</td>
</tr>
<tr>
<td>Genesys Digital Callback (CE22) for Genesys Engage on premises</td>
<td>127</td>
</tr>
<tr>
<td>Genesys Co-browse (CE27) for Genesys Engage on premises</td>
<td>138</td>
</tr>
<tr>
<td>Genesys SMS Routing (CE29) for Genesys Engage on premises</td>
<td>146</td>
</tr>
<tr>
<td>Genesys Messaging (CE34) for Genesys Engage on premises</td>
<td>163</td>
</tr>
<tr>
<td>Genesys Predictive Engagement (CE37) for Genesys Engage on premises</td>
<td>175</td>
</tr>
</tbody>
</table>

### Inbound

<table>
<thead>
<tr>
<th>Service</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Genesys Inbound</td>
<td>187</td>
</tr>
<tr>
<td>Genesys Predictive Routing for Customer Service (BO06) for Genesys Engage on premises</td>
<td>190</td>
</tr>
<tr>
<td>Genesys KPI Insights (BO07) for Genesys Engage on premises</td>
<td>200</td>
</tr>
<tr>
<td>Genesys Call Routing (CE01) for Genesys Engage on premises</td>
<td>213</td>
</tr>
<tr>
<td>Genesys Personalized Routing (CE02) for Genesys Engage on premises</td>
<td>227</td>
</tr>
<tr>
<td>Genesys Callback (CE03) for Genesys Engage on premises</td>
<td>250</td>
</tr>
<tr>
<td>Genesys Click-to-Call (CE21) for Genesys Engage on premises</td>
<td>263</td>
</tr>
<tr>
<td>Genesys Predictive Routing for Sales (SL06) for Genesys Engage on premises</td>
<td>273</td>
</tr>
</tbody>
</table>

### Outbound

<table>
<thead>
<tr>
<th>Service</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Genesys Outbound</td>
<td>284</td>
</tr>
<tr>
<td>Genesys Outbound Dialer (CE11) for Genesys Engage on premises</td>
<td>287</td>
</tr>
<tr>
<td>Genesys SMS Notification (CE12) for Genesys Engage on premises</td>
<td>304</td>
</tr>
<tr>
<td>Genesys Omnichannel Notifications (CE13) for Genesys Engage on premises</td>
<td>312</td>
</tr>
</tbody>
</table>

### Self-Service and Automation

<table>
<thead>
<tr>
<th>Service</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Genesys Self-Service and Automation</td>
<td>0</td>
</tr>
<tr>
<td>Genesys Customer Authentication (CE07) for Genesys Engage on premises</td>
<td>338</td>
</tr>
<tr>
<td>Genesys Voice Payment (CE08) for Genesys Engage on premises</td>
<td>348</td>
</tr>
<tr>
<td>Genesys IVR Personalization (CE09) for Genesys Engage on premises</td>
<td>359</td>
</tr>
<tr>
<td>Service</td>
<td>Code</td>
</tr>
<tr>
<td>------------------------------------------------------------------------</td>
<td>--------</td>
</tr>
<tr>
<td>Genesys Multimodal IVR (CE10) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Knowledge Management (CE28) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Chatbots (CE31) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Voicebots (CE41) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td><strong>Workforce Engagement</strong></td>
<td></td>
</tr>
<tr>
<td>Genesys Workforce Engagement</td>
<td></td>
</tr>
<tr>
<td>Genesys Workforce Scheduling for Voice (EE01) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Omnichannel Workforce Scheduling (EE02) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Shrinkage Management (EE03) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Schedule-based Routing (EE04) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Voice Recording (EE07) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Voice and Screen Recording (EE08) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Quality Management (EE09) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Employee Schedule Preferences (EE10-A) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Employee Schedule Preferences (EE10-B) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Employee Schedule Preferences (EE10-C) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Employee Schedule Preferences (EE10-D) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Schedule-based Routing (EE04) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Voice Recording (EE07) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Quality Management (EE09) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Performance Management (EE14) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Proficiency Development (EE15) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Skills Management (EE16) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Outsourcer Management (EE17) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Compliance Certification (EE19) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Employee Onboarding (EE20) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys IVR Recording (EE21) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Speech Analytics (EE22) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Advanced Text and Speech Analytics (EE23) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Trade and Speech Analytics for Customer Service (EE24) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Trade and Speech Analytics for Compliance (EE25) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Back-office Scheduling (EE26) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys WFM Third-Party Integration (EE27) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Task-based Scheduling (EE28) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Compliance Recording (EE29) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Selective Recording (EE30) for Genesys Engage on premises</td>
<td></td>
</tr>
<tr>
<td>Genesys Agent Assist (EE31) for Genesys Engage on premises</td>
<td></td>
</tr>
</tbody>
</table>
Find all Genesys Use Cases for Genesys Engage on-premises

Sort or search the table to find the use case you want to view, then click the title.

<table>
<thead>
<tr>
<th>ID</th>
<th>Title</th>
<th>Product Category</th>
<th>Subtitle</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>&gt; BO02 Genesys Work and Lead Distribution Digital Optimizing work distribution across the enterprise to deliver all promises on time</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>&gt; BO03 Genesys Task Distribution-Workgroup Digital Optimize tasks sent to workbins</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>&gt; BO04 Genesys Personalized Task Distribution Digital Push tasks to workers' personal queues based on multiple data sources</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>&gt; BO06 Genesys Predictive Routing for Customer Service Inbound Place CX and agent efficiency at the center of your routing decisions using AI to match each customer interaction with the best agent</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>&gt; BO07 Genesys KPI Insights Inbound Monitor and analyze interaction data to detect addressable service level anomalies</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>&gt; BO11 Genesys Dynamic Case Management Digital Combine Genesys Omnichannel customer experience with Dynamic Case Management to support human-centric automation, continuous innovation and transformation</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>&gt; CE01 Genesys Call Routing Inbound Route voice interactions to the best skilled resource</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>&gt; CE02 Genesys Personalized Routing Inbound Apply personalized routing to voice interactions</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>&gt; CE03 Genesys Callback Inbound Offer callback to queuing callers</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>&gt; CE07 Genesys Customer Authentication Self-Service and Automation Identify and verify customers in your IVR</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>&gt; CE08 Genesys Voice Payment Self-Service and Automation Capture payments in your IVR</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>&gt; CE09 Genesys IVR Personalization Self-Service and Automation Increase self-service by personalizing your IVR</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>&gt; CE10 Genesys Multimodal IVR Self-Service and Automation Present your customers with a visual way to complete or complement voice interactions</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>&gt; CE11 Genesys Outbound Dialer Outbound Improve customer communications and increase sales conversion using powerful dialer capabilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>&gt; CE12 Genesys SMS Notification Outbound Use SMS to notify customers</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>&gt; CE13 Genesys Omnichannel Notifications Outbound Use multiple channels to notify customers</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>&gt; CE16 Genesys Email Routing Digital Route email interactions to the best skilled resource</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>&gt; CE18 Genesys Chat Routing Digital Route chat interactions to the best skilled resource</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>&gt; CE19 Genesys Social Media Routing Digital Engage with your customers through social channels</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>&gt; CE20 Genesys Personalized Digital Routing Digital Apply personalized routing to digital interactions</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>&gt; CE21 Genesys Click-to-Call Inbound Enable click-to-call from your</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
website or app to improve service and conversions"> CE22 Genesys Digital Callback Digital Enable customers to request a callback from your website or app"> CE27 Genesys Co-browse Digital Extend voice or chat interactions with co-browse"> CE28 Genesys Knowledge Management Self-Service and Automation Offer FAQs to customers and a knowledge library to employees"> CE29 Genesys SMS Routing Digital Route SMS interactions to the best resource"> CE31 Genesys Chatbots Self-Service and Automation Use chatbots to automate customer conversations and seamlessly hand over to a live agent when needed."} CE34 Genesys Messaging Digital Offer a powerful new way for customers to connect with you directly in Messages"> CE37 Genesys Predictive Engagement Digital Use AI powered journey analytics to observe website activity, predict visitor outcomes, and proactively engage with prospects and customers via agent-assisted chat, content offer or chatbot."} CE41 Genesys Voicebots Self-Service and Automation Use voicebots to automate customer conversations and seamlessly hand over to an agent if needed."} EE01 Genesys Workforce Scheduling for Voice Workforce Engagement Optimize employee utilization for voice interactions"> EE02 Genesys Omnichannel Workforce Scheduling Workforce Engagement Optimize employee utilization for all digital interactions"> EE03 Genesys Shrinkage Management Workforce Engagement Improve operational effectiveness by better managing agent non-working time"> EE04 Genesys Schedule-based Routing Workforce Engagement Enable schedule-based routing"> EE07 Genesys Voice Recording Workforce Engagement Record voice interactions"> EE08 Genesys Voice and Screen Recording Workforce Engagement Record voice and screen interactions"> EE09 Genesys Quality Management Workforce Engagement Improve employee performance with quality management"> EE10-A Genesys Employee Schedule Preferences Workforce Engagement Empower employees with self-administration of their schedule"> EE10-B Genesys Employee Schedule Preferences Workforce Engagement Empower employees with self-administration of their schedule"> EE10-C Genesys Employee Schedule Preferences Workforce Engagement Empower employees with self-administration of their schedule"> EE10-D Genesys Employee Schedule Preferences Workforce Engagement Empower employees with self-administration of their schedule"> EE11 Genesys Shift Bidding Workforce Engagement Empower employees to influence their schedules"> EE12 Genesys Training and Activity Scheduling Workforce Engagement Manage training, coaching and offline activities scheduling across the workforce"> EE13 Genesys Skills Assessment Workforce Engagement Automate employee skills and capability assessment"> EE14 Genesys Performance Management Workforce Engagement Identify and compare employee performance"> EE15 Genesys Proficiency Development Workforce Engagement Automate personal development plan for employees"> EE16 Genesys Skills Management Workforce Engagement Align employee skills and capability with operational performance"> EE17 Genesys Outsourcer Management Workforce Engagement Manage skills and capabilities of outsourcer employees"> EE19 Genesys Compliance Certification Workforce Engagement Deploy enterprise wide certification programs and fulfill regulatory compliance"> EE20 Genesys Employee Onboarding Workforce Engagement Automate onboarding for improved speed to competency"> EE21 Genesys IVR Recording Workforce
Engagement Record the entire IVR interaction”> EE22 Genesys Speech Analytics
Workforce Engagement Gain basic insight into voice interactions using speech analytics”> EE23 Genesys Advanced Text and Speech Analytics Workforce Engagement Achieve deeper operational insights with speech and text Analytics”> EE24 Genesys Text and Speech Analytics for Customer Service Workforce Engagement Mine call recordings for insights to improve agent and customer experiences”> EE25 Genesys Text and Speech Analytics for Compliance Workforce Engagement Enforce compliance and legal responsibilities with speech and text analytics”> EE26 Genesys Back-office Scheduling Workforce Engagement Optimize utilization for back-office and task-based workers”> EE27 Genesys WFM Third-Party Integration Workforce Engagement Enable bi-directional Integration of WFM with 3rd party systems”> EE28 Genesys Task-based Scheduling Workforce Engagement Control the scheduling of the sequence of task agents work on”> EE29 Genesys Compliance Recording Workforce Engagement Enable your contact center to meet quality and/ or regulatory compliance requirement”> EE30 Genesys Selective Recording Workforce Engagement Deliver selective recording of your agents based on metadata for review purposes”> EE31 Genesys Agent Assist Workforce Engagement Monitor customer and agent conversations to provide the agent with contextually relevant suggestions.”> SL06 Genesys Predictive Routing for Sales Inbound Place revenue generation at the center of your routing decisions by using AI to match each customer opportunity with the best agent
Genesys Digital

Genesys Digital Use Cases for Genesys Engage on-premises

Sort or search the table to find the use case you need to edit. Click the title link to go to the use case.

<table>
<thead>
<tr>
<th>Use Case</th>
<th>Subtitle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Genesys Work and Lead Distribution (BO02)</td>
<td>Optimizing work distribution across the enterprise to deliver all promises on time</td>
</tr>
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</tr>
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<td>Push tasks to workers' personal queues based on multiple data sources</td>
</tr>
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</tr>
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</tr>
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<td>Route chat interactions to the best skilled resource</td>
</tr>
<tr>
<td>Genesys Social Media Routing (CE19)</td>
<td>Engage with your customers through social channels</td>
</tr>
<tr>
<td>Genesys Personalized Digital Routing (CE20)</td>
<td>Apply personalized routing to digital interactions</td>
</tr>
<tr>
<td>Genesys Digital Callback (CE22)</td>
<td>Enable customers to request a callback from your website or app</td>
</tr>
<tr>
<td>Genesys Co-browse (CE27)</td>
<td>Extend voice or chat interactions with co-browse</td>
</tr>
<tr>
<td>Genesys SMS Routing (CE29)</td>
<td>Route SMS interactions to the best resource</td>
</tr>
<tr>
<td>Genesys Messaging (CE34)</td>
<td>Offer a powerful new way for customers to connect with you directly in Messages</td>
</tr>
<tr>
<td>Genesys Predictive Engagement (CE37)</td>
<td>Use AI powered journey analytics to observe website activity, predict visitor outcomes, and proactively engage with prospects and customers via agent-assisted chat, content offer or chatbot</td>
</tr>
</tbody>
</table>
Genesys Work and Lead Distribution (BO02) for Genesys Engage on premises

Important
Please be advised that this use case has been merged with Genesys Lead Engagement (SL05). SL05 has now been decommissioned and all relevant content is displayed in this use case.

Optimizing work distribution across the enterprise to deliver all promises on time

What's the challenge?
You need a better way of distributing & managing work stored in disparate enterprise systems. You need your team to get more conversions in less time. When work or leads are not automatically distributed to the best available skilled resource, the result is a negative impact to customer promises, workloads, SLAs, churn, and sales conversions.

What's the solution?
Automate the distribution of work and leads to improve productivity and enhance the overall interaction experience. Genesys pulls work from multiple systems to create a single list, then automatically categorize, prioritizes, and routes work and captured leads to the best qualified employee anywhere in your company. Eliminate “cherry-picking” and misrouting to process work and leads faster and more efficiently for better resource planning, equitable work assignment, and conversion rates.

Link to video

Other offerings:

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
  • 4.4 Distribution Flow
• 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 Workspace Desktop Edition
  • 7.3 Document Version
Use Case Overview

Story and Business Context

Work items and sales leads created in CRM, BPM, marketing, email, or workflow source systems each have their own business processes and corresponding journey touchpoints. Siloed workbins across different business units, geographical regions, systems, or resource groups cause inefficient distribution of work items and sales leads.

It is challenging to distribute high volumes of work items and sales leads fairly, quickly, and in accordance to the underlying customer commitment or SLA. While many have invested in automation, these systems and applications focus on the process and not the employees who actually complete the processes.

Genesys Intelligent Workload Distribution (iWD) allows for the effective management of all enterprise work items and leads. Capturing work created in multiple source systems, placing them into a universal queue, and constantly reprioritizing them based on business needs delivers efficient distribution. Genesys distributes work items and leads at the right time to the best-skilled and available employee to complete the task or close the lead.

The ability to define and edit business logic easily drives the proper prioritization and distribution of leads between the available resources. It also prevents “cherry-picking” of work and balancing out the interactions between the available resources fairly and equally. Work items and sales leads can be segmented and prioritized based on multiple business parameters such as lead capture date, expected value, customer segment, and so on. For example, a consumer shopping online that has abandoned their shopping cart is an interaction captured by the website and delivered to Genesys iWD as a “hot lead.” The lead takes its place in the universal queue with a priority schema defined by the size of the shopping cart, the value of the product or service, or other data points about the customer. The lead is constantly reprioritized and then distributed based on business rules that define the service level.

By using Genesys iWD, companies improve their throughput and lead conversion rates, while managing operational costs, enhancing customer experience, and keeping employees satisfied.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Customer Experience</td>
<td>Deliver all committed work items on time to customers. Automation of lead follow-up ensures faster responses to prospects, improving their experience. Rigorously applying skills-based routing to match segmented leads with the best-skilled employee.</td>
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<tr>
<td>Improved Employee Utilization</td>
<td>Remove cherry-picking by pushing work items to the right employees. Prioritizing and presenting leads to sales reps reduces idle time, increases throughput, and improves their utilization.</td>
</tr>
<tr>
<td>Increased Revenue</td>
<td>Value-based prioritization speeds up response times for important leads, increasing conversion rates and revenue.</td>
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Use Case Benefits | Explanation
--- | ---
Prioritizing and re-prioritizing leads based on various business values at that moment in time.

Reduced Administration Costs | Intelligently automate work item distribution, reduce manual distribution and monitoring of tasks by supervisors, improve scheduling and reporting. Add visibility into employee and group performance. Automatic lead distribution reduces time spent by supervisors and administration staff in monitoring, distributing, and reporting on leads. Providing visibility through real-time and historical metrics. Providing necessary data for workforce management and optimization.

Reduced Employee Attrition | Offer fair distribution of workload across the available resources. Visibility into how leads are processed by employees.

Summary

The design of Genesys Intelligent Workload Distribution (iWD) enables effective capture, classification, prioritization, management, and distribution of work items and high value leads. This distribution occurs across multiple departments to the best-suited employees, based on business segmentation, resource skills, and availability.

The powerful iWD Manager enables business users to define and adjust business segmentation rules and prioritization schemas, as well as view near real-time dashboards into operational performance and backlog. Genesys gives administrators control over the routing logic once the task or lead needs to be delivered to the Genesys agent desktop.

Genesys captures new work items or leads from multiple source systems and creates an interaction in the system. The interaction goes through a process of classification, segmentation, and prioritization within the universal queue based on the business rules created.

Once an employee with the right skill profile becomes available, the Genesys core routing engine is used to distribute it to the employee in the Genesys agent desktop at the right time to convert the lead or execute on the task. If it cannot be assigned to an employee within a specified period, it continues to be reprioritized.

Use Case Definition

Business Flow

(1) Part 1 - Capture and Distribution / Lead Generation

The diagrams in the following chapters show the business flow of this use case.
Business Flow Description

1. The system creates a new item in the system with all attached data necessary to process. For leads, see the "Attributes" topic. The source system requires an employee to handle a work item. The source system is the BPM, CRM, or business system that stores and processes the work items associated with said business process. Genesys intelligent Workload Distribution creates the corresponding work item via the Capture Adapter.

2. Genesys captures the new work item and handles the creation of a new interaction in the system.

3. The interaction is classified and prioritized according to specific lead rules and the business value of the lead (or) the nature of the work item. The lead and work items reprioritize continually if they fail distribution to an employee.

4. The lead/work item is queued with all other interactions in the Genesys system. The priority of these items defines the position in the global queue. Once an employee with the right skill profile becomes available to handle the work item, the item distributes to that employee. If the system cannot assign it within a specified period, it remains reprioritized.

5. The respective employee (could be lead development representative or an Agent) will be able to open the task in the Workspace Desktop to manage and/or complete the task.

6. The lead development representative could use the contact provided by the customer to contact the lead. For work items, the agent could open them with their respective CRMs to further handle the task.
Genesys Work and Lead Distribution (BO02) for Genesys Engage on premises

Business Flow

(2) Part 2 - Work Item Handling

Genesys Engage On-premises Use Cases
Business Flow Description

1. The employee handles the lead/work item (either an outbound call for leads or through source system for work items). After finishing their work, they decide on the next step.

2. The employee may be able to complete the work item so that no further action is required.
   - After the outbound call the lead representative could record the result for reporting purposes (converted, not converted) (or) the source system updates Genesys that the work item is completed and Genesys can archive the work item
   - Alternatively, the employee couple complete the task within the Workspace desktop (using the "mark done" button).

3. The employee may choose not to finish their work immediately if, for example, they are waiting for a call back from the customer or a colleague. In this work item, the employee can park the work in their personal workbin.

4. The employee may need to reschedule the work item if, for example, the customer is only available on the next day. They reschedule the work item via the source system.

5. The employee may not be able to handle the work item because it is wrongly classified. They reclassify the work item via the source system. (not applicable for leads)

6. The employee might not take any action in the source system (not applicable for leads):
   - The employee may accidentally finish the work item in the employee desktop without any update in the source system ("mark done"). ? To prevent this the mark done button can be disabled in Genesys desktop.
   - Genesys does not receive an update of the work item via the Cloud REST Capture Adapter. In this scenario the source system needs to check for these tasks and update/restart the tasks in Genesys.
Business and Distribution Logic

Business Logic

Before Genesys receives work items, the source system classifies the work and attaches all the necessary metadata. Then, Genesys matches this work with the best employee at the right time.

Genesys system analyzes work items created within to be able to:

- Be associated with the right business process, department, queue, prioritization schema, and employees. The Genesys system assigns work to the business process in real-time based on employee presence and capacity rules.

- The source systems can optionally assign the due date and priority settings for handling the work item (so called work item prioritization).

- Distribution schema applied to the work items is crucial for both steps above. For example, the business process, department and metadata define needed the skills to handle the work item. Segmentation and prioritization depend on the attributes associated to work items and on business requirements. The following sections describe these attributes or metadata.

**Attributes**

Work item segmentation and prioritization depend on metadata input from one or more source systems. To apply the segmentation and prioritization within the Genesys system, a set of business attributes (parameters) must arrive from the source system. These attributes captured by the capture event are within the Genesys capture adapter.

The global task list includes work captured. Genesys intelligent Workload Distribution Manager applies segmentation rules to separate work items using core attributes and custom attributes:

- For the work item to pass from the source system, it must be a core attribute. A core attribute is a fixed attribute passed from the source system, otherwise the system rejects (external identifier) it.

- Custom attributes can guide the work item to an employee and reflect in the routing and reporting. At the beginning of the project, generation of the mapping between the source system to Genesys iWD attributes occurs. The business user can manage their environment, once establishing the environment. Screen pops on the agent desktop and segmentation in iWD Manager occur through work item and custom attributes.

For detailed Attribute List for Leads, refer to the respective Leads Attribute List section below:

**Business Rules**

Business Rules define or mirror both the operating principles and constraints of an organization. A few examples:

- All work items associated with Sales Department and Customer Segment Gold shall be handled within 72 hours.

- If the work item attribute department equals Sales and the Customer Segment equals Gold then the Service Level Agreement (SLA) is 72 hours.

These and finer-grained segmentation rules established in iWD Manager and managed by the business user. The GRE & ORS applications controls the distribution strategy for work items to the desired employees.

iWD Manager uses the attributes from the captured work item to assign the task. It can assign directly to an employee, agent group, combination of skills, or skill proficiency levels. Importance of the work relative to other work items is a key factor that determines prioritization in the global task list. Work in the longest routing status distributes first when there are multiple work items with the same priority targeting the same employees.
The same applies for leads, the priority schema defined within iWD manager is highly flexible and business users can adjust the priority curve to suit their business needs.

In the following sales example, the business value of the lead degrades over time. When a promotion runs for leads that didn’t convert within six days, the business user raises the priority between six and eight days after capturing the lead.

Note: In a blended environment, the priority ranges used for leads align with the priority ranges for other media types to ensure the right behavior (distribution order) within the environment. For example, if the employee is answering both phones calls and leads, the sales manager decides that phone calls have a higher priority. The result is voice calls priority starts higher than work items maximum priority. If there is an inflection point where the leads are more important than voice calls, then the prioritization strategy should reflect that. For example, leads within 2 hours of their due date and time are more important than voice calls that are in the queue for 30 seconds.

**Business Context and Segmentation**

Genesys intelligent Workload Distribution assigns every work item to a business process. Assignment of work items occurs after capture based on the segmentation defined within iWD Manager. The Finance and Sales Departments example shows the split of the processes according to the respective segment, and it reflects the different types of skills and proficiencies. The departments and process names adapt easily according to the changing organization’s requirements.

Intelligent Workload Distribution Manager configuration segmentation example table:

<table>
<thead>
<tr>
<th>Department</th>
<th>Customer Segment</th>
<th>Priority increase scheme</th>
<th>Min priority</th>
<th>Max priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finance</td>
<td>Gold</td>
<td>Gold</td>
<td>400</td>
<td>1000</td>
</tr>
<tr>
<td>Finance</td>
<td>Silver</td>
<td>Silver</td>
<td>200</td>
<td>1000</td>
</tr>
<tr>
<td>Finance</td>
<td>Bronze</td>
<td>Bronze</td>
<td>100</td>
<td>1000</td>
</tr>
<tr>
<td>Sales</td>
<td>Gold</td>
<td>Gold</td>
<td>500</td>
<td>2000</td>
</tr>
<tr>
<td>Sales</td>
<td>Silver</td>
<td>Silver</td>
<td>200</td>
<td>1000</td>
</tr>
<tr>
<td>Sales</td>
<td>Bronze</td>
<td>Bronze</td>
<td>100</td>
<td>400</td>
</tr>
</tbody>
</table>

Unspecified business processes use a default segmentation, prioritization, and distribution scheme.

**Priority Schema**

The system applies the priority schema to the work item/lead initially after capture and again periodically, according to defined prioritization schema. The reprioritization follows the logic defined below.

Rules define the logic to increase the priority over time by.

- Setting an initial value for the priority
- Setting a priority increment
- Setting the various periods between priority increments
- Setting the due date and time
- Set an overdue priority
- Setting the overdue or at SLA value of the priority
The priority of each work item or lead represents the urgency and business value at that point in the life cycle of the item. The prioritization schema allows a balance of work items representing different Service Level Agreements (SLA). The prioritization allows items of a shorter SLA to increase faster and reach the maximum priority compared with items of equal business value with a longer SLA. The values selected along the graph reflect the different SLAs. In other words, maximum priority culminates with the due date. In a blended environment, priority ranges used for items must broadly align with the priority ranges for other media types to ensure the right behavior (distribution order) within the environment.

As an example, for employees answering phone calls and items, phone calls have priority. The priority of voice calls is higher than items. If there is an inflection point where work items/leads are more important than voice calls, then the prioritization strategy should reflect that. For example, work items/leads within 2 hours of their SLA are more important than voice calls that have waited in queue less than 5 minutes.

**Work item/lead life cycle (or) Work item/lead completion - Option 1 in source system and in Genesys**

Genesys work items complete via the source system. The logical flow is as follows:

1. The employee completes a work item/lead in the source system.
2. The employee presses "Mark Done" in Genesys to signal that they have finished working on the work item/lead. The employee is then ready for the distribution of their next work item/lead.
3. The source system sends an update via the Capture Adapter to complete the item. If the update does not arrive within a specified timeout, the item goes back into distribution with the same priority. The calculation of priority referenced is in the graph described in the section "Priority Rules." The item going back to distribution ensures that the item avoids a stuck state in the Genesys system. If the employee accidentally presses "Mark Done" in Genesys, the redistribution of the item takes place.

**Work item/lead life cycle (or) Work item/lead completion - Close in source system**

Genesys work items complete via the source system. The logical flow is as follows:

1. The employee completes a work item/lead in the source system.
2. The source system sends an update via the Capture Adapter to complete the work item/lead. If this update does not arrive within a specified timeout, the item goes back into distribution with same priority. The priority calculated from the graph described in the section 'Priority Rules'. If the employee accidentally presses "Mark Done", the item goes back to distribution preventing a stuck status in the Genesys system. Disabling the "Mark Done" button within the Genesys agent desktop is an option to prevent this scenario from occurring.

**Parking work items/lead in the personal workbin**

If an employee is unable to complete the task, they can store it in their personal workbin for later. When they need to access the item, the employee can just pull it from their workbin to continue working on it. The use of workbin is helpful when employees are sick or taking time off. Supervisors manage workbins through the desktop to prevent stuck items in an employee's workbin. Items return to queue or assigned to another team member.

**Rescheduling work items/leads**

An employee may also need to reschedule a work item/lead, when a customer is available the following day. The source system handles rescheduling and depending on its functionality and integration with Genesys intelligent Workload Distribution. The logical flow is as follows:

1. The employee determines to reschedule a work item/lead.
2. The employee updates the source system, optionally setting an activation date in the source system. Most important, the employee sets the new SLA date and time in the source system.

3. The employee sets Mark Done in the agent desktop. The employee is available to work on the next work item/lead.

4. The source system updates the work item/lead in Genesys with a so-called activation date which is the date set by the employee. Updating the date prevents the item from distributing before the activation date. The work item/lead is prioritized following the logic described above, starting with the activation date. If the activation date fails to set, then the source system updates the work item/lead based on the new SLA.

Reclassifying work items/leads

An employee might also need to reclassify a work item/lead. The source system handles resegmentation which depends on the functionality and integration to Genesys intelligent Workload Distribution

The logical flow is as follows:

1. The employee reclassifies a work item/lead.
2. The employee updates the source system and sets the new date in the source system.
3. The employee sets Mark Done in their agent desktop. The employee is available to work on the next work item/lead.
4. The source system updates the work item/lead in Genesys with the new attributes. The process of classification of the work item runs according to the new attributes. The item distributes to an employee with the right skill profile

Leads Attribute List

The attributes used for one or multiple of the following purposes:

•Segmentation (See topic ‘Business Context and Segmentation’)

•Prioritization (see topic “Priority Rules”).

•For display within the agent desktop.

The following table lists the attributes and its purpose which is available as part of this use case.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Segmentation</th>
<th>Prioritization</th>
<th>Agent Display</th>
</tr>
</thead>
<tbody>
<tr>
<td>External ID</td>
<td>Mandatory ID to identify the lead</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Contact Number</td>
<td>Contact number to call the customer</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Alternative Contact Number</td>
<td>Alternative contact number to call the customer</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Name</td>
<td>Customer Name</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Surname</td>
<td>Customer Surname</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Customer Segment</td>
<td>Mapped to a business attribute by the organization</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>
### Attribute Description Segmentation Prioritization Agent Display

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Segmentation</th>
<th>Prioritization</th>
<th>Agent Display</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer ID</td>
<td>ID to identify the customer in a third-party system</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Product</td>
<td>To be mapped to a business attribute by the organization</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Subproduct</td>
<td>Mapped to a business attribute by the organization</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Deal Value</td>
<td>The actual or estimated value of the lead</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Type of Request</td>
<td>Mapped to a business attribute by the organization</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Lead Description</td>
<td>A short text to provide information to the agent on the lead (max. 30 characters)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The table focuses on the attributes actively used within the configuration of this use case, however the iWD data model contains a broader list of attributes.

### Distribution Flow

The following diagram shows the distribution flow:
Distribution Flow Description

1. Distribution of a work item/lead.

2. If the work item/lead attributes include a preferred employee, Genesys attempts to distribute the work item/lead to this employee until reaching the configurable time-out. The item distributes to its primary target. The primary target defined by all employees with a specific skill or skill level, after the time-out.

3. Genesys expands distribution to the 'reception skill' or a catch-all skill expression, in the event the item fails distribution to the primary target within a configurable time-out.

4. Genesys expands distribution to the tertiary target, in the event the item fails distribution to the secondary target within a configurable time-out.

5. Genesys waits for an employee satisfying the skill/skill level requirements for the expanded target until the work item/lead distributes.

The SLA defines input parameters. Time-out values for the overflow logic are also related to the SLA and defined by SLA. See the topic under ‘Priority Rules’.
Distribution Logic

**Skill and proficiency-based routing**

This use case is provided with a predefined routing strategy that creates all the queues needed to assign a work item/lead to a specific employee. The distribution strategy is based on a series of skill expressions, ensuring that a work item/lead is distributed to the most suitable employee, independent of their location within the organization. The required skill(s) and proficiency levels are defined by the department and process the item belongs to. See "Business Context and segmentation" for the logic to define the Genesys intelligent Workload Distribution department and process. Each employee has one or more skills associated with their profile and a skill level associated to each skill, referred to in this document as proficiencies. The metadata on the work item/lead and the distribution strategy is used to define the primary, secondary, and tertiary targets within the routing logic described below. The targets are defined as follows:

- Primary target = Employees with base skill level > N
- Secondary target = Employees with base skill level > M
- Tertiary target = Employees with base skill level > P

The values for N, M, and P are configurable in iWD Manager and routing strategy based on Department, Process, and metadata attached to the work item.

For example:

- Primary target = Sales Processing > 7 and Legacy System Processing > 1
- Secondary target = Sales Processing > 4
- Tertiary target = Sales Processing > 0

**Routing to Preferred Employee**

The source system can provide a preferred employee for a work item/lead as work item/lead metadata. In this work item/lead, the distribution logic first attempts to distribute to a preferred Employee. If the work item/lead cannot be distributed to this Employee within a specific time out, routing to the skill is applied. This timeout is configurable as a percentage of the SLA as a global parameter.

**Additional Distribution Functionality**

The distribution logic supports redistribution or "RONA" functionality. In other words, if an employee does not accept an item distributed to them, the item is routed to another employee after a time out. The first employee is set to not ready. This use case is combined with use cases for different media types. Blending with other media types, including the required configuration of capacity rules, is supported.

**User Interface & Reporting?**

**Agent UI**

Agent Desktop enables agents (employees) to handle Work Items through the following functionality:
• Work item/lead processing from Genesys work blending
• Auto or manual answer
• Pop up of the work item/lead in the source system by a URL or by displaying capture ID to manually open a work item/lead in the source system
• Agent Workbins for parking and pulling of work items/leads (Group Workbins not supported in this use case)
• Option to disable "Mark Done" button
• Disposition codes
• Contact History with Universal Contact Server
• Support for Salesforce.com through Gplus Adapter which integrates the Agent Desktop as a tab or floating window (Gplus Adapter supports intelligent Workload Distribution)
• Ability to transfer work items/leads
• Multiple configurable not-ready reason codes (for example: Admin Work, Lunch, Meeting, Pause, RONA, and Training)
• Display of agent, status, and interaction statistics in the Agent Desktop

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:

• **IWD Agent Activity** — Displays agent or agent group activity as it relates to the processing iWD work items type contacts.
• **IWD Queue Activity** — Displays an overview of current or near real-time activity associated with the iWD queues.

See [Standard Report Templates](#) for more information.

**Note:** Genesys Pulse is limited to a 24-hour window, so cannot be used to track work item/lead backlogs over longer periods. Backlog reporting is available through **iWD Manager for cloud**. For more detailed information on the dashboards available within iWD Manager for Cloud, please visit [iWD Manager Dashboard](#) documentation.

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 provide intraday tracking of processes, resource performance, and task handling.
Some of the most relevant reports include:

- **Intraday Process Dashboard** — Provides an intraday overview of the completed iWD tasks that were overdue, along with the counts, percentages, and averages of completed iWD tasks, including a breakdown of the average amount of time it took to complete tasks. This dashboard provides visual summaries of the detailed information in the Intraday Process Report.

- **Intraday Process Report** — Provides information about the performance of historical and pending work items. Use this report to learn more about sources of backlog, about throughput, and to understand how often tasks become overdue before they are finished. Includes counts of the completed iWD tasks that were overdue, and counts, percentages, and averages of completed iWD tasks, along with a breakdown of the average amount of time it took to complete tasks.

- **Resource Performance Dashboard** — Gives insight into the amount of time and effort resources are spending to resolve work items.

- **Resource Performance Report** — Insight into how resources handle tasks over specific time periods, which can help you gain insight into the variability of performance for each process, department, and days the resource worked.

- **Task Detail Report** — Provides details about individual work items when viewed from the customer perspective.

- **Task Work Detail Report** — Provides detailed information about tasks that involved more than one employee, and about the queues that distributed the tasks to the employees.

- **Customer Segment Service Level Report** — Provides information about the number of new tasks, number of completed tasks, and the percentage of all tasks that were completed during the reporting interval, by day, by customer segment, and by business process.

See more information, see [Get started with Genesys CX Insights](#) and [Genesys CX Insights reports for iWD Cloud](#).

### Customer-facing Considerations

#### Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>None</td>
<td>Digital</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Genesys Email Routing (CE16)</td>
<td></td>
</tr>
</tbody>
</table>

#### General Assumptions

- Business Calendar attributes are handled in Designer.
• Customizations of the business process are supported through Designer.

• The recommended approach is for the source system to provide the necessary meta data for iWD Manager to perform the classification of the work down to the department and process level.

• If this capability does not exist in the source system, the source system must classify the work down to the Department and Process level.

• Employee capacity rules will be provisioned through Agent Setup.

• Blending of voice, chat, and work item is supported. Agent Setup provisions the capacity rules for employees; for example, the agent will only work on more than media at once (1 voice, 3 chat, 1 email, 2 work items). Routing then handles the delivery of work items based on priority.

• The following known limitations exist in this use case for cloud
  • Genesys Pulse reports and dashboards are generic to the Agents, and not specific to work items. iWD Manager dashboards functionality needs to be used for work item specific realtime reports and dashboards.
  • All work items need to be submitted through the cloud capture point only.
  • No 3rd party WFM support

Customer Responsibilities

• Intelligent Workload Distribution use case with tasks arriving from a source system use a provisioned bi-directional REST capture point.

• The customer handles the Genesys intelligent Workload Distribution integration of the source system.

• Any source-system changes needed for the integration with Genesys are within the customer responsibility.

• The source system must support the update of work items in Genesys intelligent Workload Distribution as required by the work item life cycle (complete, update, pause, resume, cancel, and so on).

• To enable the functionalities of resegmentation and rescheduling, the source system must support the flow as described above.

• The work item completed in the source application, so the employee must have access in the source application (BPM/CRM). To enable pop-up of the work item in the source activation, a URL must be available for to Genesys to link with the work item. Otherwise the employee must pull the work item manually.

• When using preferred employee routing, the work item attributes must specify the same employee (agent) ID as used in Genesys.

• Work items captured from the BPM have the required minimum fields from the source system to apply segmentation and prioritization rules. The scenarios described above these fields are:
  • External ID - unique ID to identify the work item in the source system
  • Data used to derive the Process and Department for the work item

• All Genesys Engage cloud customers must use Genesys Customer Experience Insights for historical reporting.

• Workspace Web Edition (WWE 9.0) used as the employee and supervisor desktop.

• Limits to number of departments, processes, and rules as described in "Business Logic".

• Genesys Pulse and iWD manager used for real-time reporting.
• Work items appear in this use case as the "workitem" media type.

Related Documentation

Agent Desktop
Agent Workbins, Status, and statistics.
Gplus Adapter Salesforce integration.
• Agent Desktop Workbins
• Workitem handling
• Agent Status
• Statistics
• Gplus Adapter for Salesforce

Workspace Desktop Edition
Agent Workbins, Status, and statistics.
• Workbins
• Workitem handling
• Agent Status
• Statistics

Document Version
• Version V 1.1.1 last updated July 12, 2021
Genesys Task Distribution-Workgroup (BO03) for Genesys Engage on premises

Optimize tasks sent to workbins

What's the challenge?

Customer promises are broken as work falls through the cracks. Employee morale suffers with unfair workloads. The business faces low utilization, failed SLAs, transfers, churn, lower sales and poor visibility into performance. You need a better way to make work available to staff and manage tasks waiting to be handled.

What's the solution?

Make it easy for employees to see and select relevant work to make them more productive and enhance the employee and customer experience. Genesys Task Distribution - Workgroup places work into work bins so employees with certain skills can easily pick tasks to complete. Auto-escalation ensures service levels are met.

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 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 Workspace Desktop Edition
  • 7.3 Document Version
Use Case Overview

Story and Business Context

Customers want to enjoy the benefits of automated work distribution capability, but want to provide flexibility for their staff to select the task from a pre-optimized work list (also known as Optimized Pull Mode) instead of implementing direct Push to deliver tasks.

The back office automation system can be integrated with one or multiple source systems, where the customer-related tasks are created and stored. The system can capture, classify, prioritize, distribute, and manage these tasks efficiently to group or individual workbins from where the agents can pull their desired tasks from pre-prioritized and assigned work packages.

All work packages are assigned to the workbins and can be pre-prioritized based on a centralized business logic, and can be fairly distributed among the available agents.

Pull mode allows freedom for the agents to choose which work items they want to complete first, but they can select only one of the pre-assigned tasks. The task distribution is fully automated, all handling times and performance parameters can be measured, and the fulfillment of SLAs can be supported by the workbin assignment mechanism and used for Workforce Management.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Customer Experience</td>
<td>Delivered committed tasks on time and provide better quality answers by better matching skills</td>
</tr>
<tr>
<td>Improved Employee Utilization</td>
<td>Improve occupancy by reducing idle time and improving AHT through intelligent task distribution based on task attributes and agent/employee skills</td>
</tr>
<tr>
<td>Reduced Administration Costs</td>
<td>Automate task distribution, reduce manual distribution and supervisor task-monitor; schedule and report through intelligent task distribution</td>
</tr>
<tr>
<td>Reduced Employee Attrition</td>
<td>Offer fair balance of workload among all available resources</td>
</tr>
<tr>
<td>Reduced Interaction Transfers</td>
<td>Reduce transfers through the ability to discern the impact of distribution on transfers of tasks</td>
</tr>
<tr>
<td>Reduced Penalties and Fines</td>
<td>Provide insights of untouched tasks through escalation of these tasks after a given period of time to the appropriate management resource</td>
</tr>
</tbody>
</table>

Genesys Engage On-premises Use Cases
Summary

This use case extends Genesys Task Distribution (BO02) by adding Optimized Pull, which enables organizations to leverage essential parts of iWD capabilities without fully implementing the automated Push mechanism. Tasks are distributed to personal and/or group workbins and agents can fetch tasks from there. Customers can also easily migrate from the decentralized pull mode to a more automated task distribution. If working in push mode is not allowed for any reason, the concept of Optimized Pull still provides a controlled and predictable method of work and delivers the required transparency across the company.

Use Case Definition

Business Flow

The following diagram shows the business flow of the use case:
**Business Flow Description**

1. A new task is created in the source system (BPM, CRM, or Workflow).

2. Genesys captures the task from the source system and creates an interaction in the system. The interaction is classified and prioritized according to business rules and the task type (see Business Logic). The tasks are reprioritized within certain periods of time. See Genesys Task Distribution (BO02) for Genesys Engage for details.

3. Genesys looks for an available slot in a personal or group workbin of agents with the required skills. The distribution logic fills up the workbin until the maximum number of tasks is reached (or no task for the corresponding skill is available). If no workbin has an available slot, Genesys queues the task and reprioritizes in predefined intervals until it can be distributed.

4. If the task is not handled within the time threshold (calculated as a percentage of the SLA), the task is sent back to Genesys for escalation handling. Escalation handling may include:
   1. Distribution to another agent / agent group workbin, or
   2. Distribution to a supervisor workbin
      - Tasks continue to be reprioritized at regular intervals, even if they are distributed to a workbin, to ensure that their priority reflects the proximity of the due date. Tasks are temporarily removed from the workbin for reprioritization.

5. The agent can pull a task via the Genesys desktop, which displays the task and opens the corresponding work item within the source system.

6. Task handling functionality occurs exactly as in.
Business and Distribution Logic

Business Logic

Workbin handling

Workbins contain a list of tasks that an agent can pull. While the agent is free to choose the tasks from the workbin, there is still a level of control as they are fully managed through defined business rules. Tasks within workbins may be reprioritized or redistributed automatically to support evolving Service Levels and business priorities.

Personal workbins

Personal workbins, assigned to a single agent, enable the agent to receive more than one work item (depending on the distribution rules) from the Global task list. Conceptually you can think of workbins as an agent's personal queue. Agents can place work items in their personal workbins when they cannot complete the work, and can also transfer work items from their workbin to other colleagues or supervisors. While agents cannot see work items in other workbins, supervisors and managers can. Personal workbins are equipped with an automated escalation capability, which means that work items are sent to a supervisor or back to the Global Task List automatically if they are not handled before the threshold is reached. This capability adheres to service levels and ensures that no work item remains in a workbin for too long.

Group workbins

Group workbins are assigned to a group of agents (could be considered a bucket of centrally managed tasks that are allocated to a virtual group of agents). More than one work item can be transferred from the Global Task List to the group workbins (depending on the distribution logic). Agents assigned to a group workbin can work on any of its tasks and transfer tasks to other colleagues or supervisors. Like personal workbins, group workbins are equipped with an automated escalation capability, ensuring that no work item remains in a workbin for too long without handling.

Business Rules

In addition to the Business Rules detailed in the use case Genesys Work and Lead Distribution (BO02) for Genesys Engage on premises, Optimized Pull requires:

- Definition of the maximum number of tasks allocated to a group or personal workbin at one time. This parameter is configurable per agent or agent group.
- A threshold time that determines when a task is pulled from a group or personal workbin and reprioritized and/or reassigned. This threshold time is based on a percentage of the Service Level for this task and can be set on the department level within iWD.
- A threshold time that determines when a task should be escalated to a Supervisor/Coach/Escalation Manager for supervisor attention or reassignment. This threshold time is based on a percentage of the Service Level and can be set on the process level within iWD.

Distribution Logic

This use case uses the routing logic detailed in BO02, enhanced by the capability of distributing work items to group and/or personal workbins.

Task Lifecycle
In addition to the task lifecycle described in BO02, this use case adds a task supervision step to the lifecycle. Working with workbins opens the possibility for agents to ignore certain tasks and leave them in the workbin unhandled. Supervisors can close or manually reassign overdue tasks to named agents to ensure timely handling. If a task becomes due and remains unhandled, the task is automatically pulled from the workbin. It is redistributed to a special agent with capabilities to either work and finish these kinds of tasks or to redistribute them manually to assure they are handled as soon as possible. The task may either be routed to a specific skill or to a dedicated agent (such as a team leader).

User Interface & Reporting?

Agent UI

In addition to the Agent Desktop requirements detailed in BO02, this use case requires additional statistics to be displayed on the Agent Desktop:

• Number tasks in My Workbin (group or personal)
• Number of tasks handled

Reporting

Real-time Reporting

In addition the real-time reporting delivered in BO02, this use case reports:

• The current workload in each workbin
• The age of the oldest waiting work item in each workbin
• The current number of past due work items in each workbin
• The workload for the current work week (+ past due) in one dashboard. The report displays the week with dates and all the work items due on each specific date. For example, Past Due (4), Tomorrow (5), Tuesday 22nd (44), Wednesday 23rd (64).

These KPIs are available for each iWD department and iWD process.

Historical Reporting

In addition the historical reporting delivered in BO02, this use case provides escalation reports for group and personal workbins that show the number of escalations for each workbin and the percentage of work items escalated. For example:

<table>
<thead>
<tr>
<th>Workitems Escalated</th>
<th>Escalation Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>44</td>
<td>20%</td>
</tr>
</tbody>
</table>
Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>Digital</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Genesys Work and Lead Distribution (BO02)</td>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>

General Assumptions

Workspace Desktop Edition or Workspace Web Edition is used as the agent desktop.

Customer Responsibilities

As this use case has dependencies on Genesys Work and Lead Distribution (BO02) for Genesys Engage on premises, please review and reference underlying assumptions.

Related Documentation

Agent Desktop

Agent Workbins, Status, and statistics.

- Agent Desktop Workbins
- Workitem handling
- Agent Status
- Statistics
Workspace Desktop Edition

Agent Workbins, Status, and statistics.

- Workbins
- Workitem handling
- Agent Status
- Statistics

Document Version

- Version v 1.1.1 last updated July 12, 2021
Genesys Personalized Task Distribution (BO04) for Genesys Engage on premises

Push tasks to workers' personal queues based on multiple data sources

What's the challenge?

Customer promises are broken as work falls through the cracks. Employee morale suffers with unfair workloads. The business faces low utilization, failed SLAs, transfers, churn, lower sales and poor visibility into performance. You need a better way of distributing and managing work based on customer and other data.

What's the solution?

Use multiple data sources to make work more productive and enhance the employee and customer experience. Genesys Personalized Task Distribution combines standard task attributes with customer and other contextual data to make more intelligent classification, prioritization and work distribution decisions.

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 and Distribution Logic
• 5 User Interface & Reporting?
  • 5.1 Agent UI
  • 5.2 Reporting
• 6 Customer-facing Considerations
Genesys Personalized Task Distribution (BO04) for Genesys Engage on premises

- 6.1 Interdependencies
- 7 Related Documentation
  - 7.1 Agent Desktop
  - 7.2 Workspace Desktop Edition
  - 7.3 Document Version
Use Case Overview

Story and Business Context

The personalized task distribution solution can be integrated with one or more source systems (such as CRM/BPM/workflow systems) where tasks related to customers are created and stored.

The personalized task distribution system is designed to capture, classify, prioritize, manage, report, and effectively distribute these tasks to the best fit employees based on certain business rules according to resources, skills, and availability.

Business rules configured in the personalized distribution system (such as service level agreements, business calendars, and external customer or interaction context) enable calculation of the individual task's business value and priority. This ensures the adequate prioritization and timely completion of all tasks for all customers.

Once the organization has a list of tasks that employees need to handle (coming from different systems, and the tasks already imported to the personalized task distribution system), the tasks are automatically distributed to employees based on their skills, capacity, and real-time presence. In this use case, the prioritization rules for the tasks can be influenced by real-time captured external data. These external data (captured from third-party systems such as marketing, BI, workflow, network management, and maintenance systems) can be used to modify the routing and or prioritization rules.

The system provides functionality for near-real time monitoring and historical reports of operational performance and for the key business KPIs.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Agent Competency</td>
<td>Increase throughput, utilization, and efficiency in agents' work, by delivering the tasks to the agents' universal desktops in push mode via screen pop together with interaction context and history in blending mode. Improve work item handling agility through the display of task-related external documents, references, and contextual information together with the work items</td>
</tr>
<tr>
<td>Improved Customer Experience</td>
<td>Deliver all committed tasks on time to customers</td>
</tr>
<tr>
<td>Improved Employee Utilization</td>
<td>Reduce idle time and improve Average Handle Time through an additional third-party data lookup feature that enables context-based prioritization and routing</td>
</tr>
</tbody>
</table>
### Use Case Benefits

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved First Contact Resolution</td>
<td>Provide more timely and complete insights through distribution of tasks with the full customer context</td>
</tr>
<tr>
<td>Reduced Administration Costs</td>
<td>Automate task distribution, reduce manual distribution and supervisor task-monitor; schedule and report through intelligent task distribution</td>
</tr>
<tr>
<td>Reduced Interaction Transfers</td>
<td>Reduce interaction transfers by analyzing the impact of distribution on task transfers</td>
</tr>
</tbody>
</table>

### Summary

This use case builds on the use case Engage/BO02 Genesys Work Distribution (BO02) for Genesys Engage, adding third-party data lookup to enable context-based prioritization and routing. This feature enables companies to leverage data that is not available in the source system of the tasks to be used in prioritization or distribution decisions. These systems may include marketing, BI, or data warehouse systems as well as Genesys internal context services. The use case enables companies to better target skilled resources based on interaction history and/or customer context stored in non-integrated backend systems. For example, NPS survey results from a third-party system can be used to personalize work item handling and improving business outcomes. Displaying task-related external documents, references, and contextual information together with the work item improves the agility of handling tasks. Many personalization scenarios can be supported where the dynamically captured data is used for reprioritization and/or routing enhancement.

- External Parameters might be captured from third-party systems or from Genesys Context Services (through webservice or DB lookup) to allow personalization of the business logic defined using Business Rules. Third-party systems must be integrated with Genesys to enable the capture of external context data. The format of the data and the communication interface will be defined at the beginning of the project (See Assumptions).

### Use Case Definition

#### Business Flow

The following diagram shows the business flow of the use case. Note that in the following business flow, the data lookup applies only to new interactions.
Business Flow Description

1. A task is created in the source (CRM/BPM/workflow) system.

2. Genesys captures the new tasks from the source system through existing capture adapters and creates a new interaction in iWD. See for details.

3. During the classification process iWD initiates one or more data lookups to fetch context data from third-party systems or from Genesys context services. This data can be used as additional attributes to distribute or prioritize tasks.

4. Based on the parameters available with task creation and the additional parameters fetched from another system, the interaction is classified based on business rules (see Business Logic section on Genesys Personalized Task Distribution (BO04) for Genesys Engage on premises).

5. The interactions in the GTL (Global Task List) are reprioritized within specified intervals based on task attributes and/or additional context data.

6. iWD Interactions in the universal queue get routed to an employee or supervisor based on routing logic. Once an employee with the right skill becomes available to handle the task, the task is distributed to the employee. If it cannot be assigned within a specified period of time it is reprioritized.

7. The Genesys employee desktop opens the corresponding work item within the source system. The employee handles the task in the source system, as in .
Business and Distribution Logic

Business Logic

In addition to the business logic from BO02, this use case makes the attributes from the customer context available within the business rules for task classification and prioritization as additional custom attributes. For example, the original source system may not include the customer segment for a specific task. A lookup in the CRM database can add this information to the task and can in turn be used within the prioritization rules to ensure that your VIP customers are handled with higher priority.

Distribution Logic

In addition to the distribution logic from BO02, this use case adds context-based routing, which uses the captured contextual data from third-party systems to enhance the task distribution. The attributes are made available to set up rules within the system. In addition to the standard and custom attributes supported in BO02, this use case adds further custom attributes to be used in routing rules to define the required employee skill to handle the specific interaction.

User Interface & Reporting?

Agent UI

In addition to the Agent Desktop requirements from BO02, this use case requires the display of eternal contextual data fetched from the third-party systems or Genesys context services. These will be displayed as additional Case Data in Agent Desktop interaction views, pop-up notifications, and Contact and Interaction histories.

Reporting

Real-time Reporting

The iWD out-of-the-box Pulse templates can provide the following reports.

IWD Agent Activity

A report presenting agent or agent group activity as it relates to the processing of iWD work items of the type contacts. It is possible to report separately on not-ready reason codes in the relevant KPIs.

IWD Queue Activities

A report presenting agent or agent group activity as it relates to the processing of iWD work items of the type contacts. It is possible to report separately on not-ready reason codes in the relevant KPIs. The following graphic shows a typical dashboard configured with iWD templates for work item monitoring.
Historical Reporting

Using CX Insights, Genesys provides some out-of-the-box reports and metrics, including these out-of-the-box customizable reports:

- Capture Reports
  - Capture Point Business Value
  - Capture Point Task Duration
- Classification Reports
- Customer Segment Service Level
- Intraday Backlog Summary
  - Process Volume
  - Resource Reports
  - Resource Performance
  - Queue Reports
  - Queue Priority Range
  - Queue Task Duration
- Task Detail Reports
Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Genesys Work and Lead Distribution (BO02)</td>
<td>None</td>
<td>Digital</td>
<td></td>
</tr>
<tr>
<td>• Genesys Task Distribution-Workgroup (BO03)</td>
<td>None</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

General Assumptions

This use case requires:

• Genesys Work and Lead Distribution (BO02) for Genesys Engage on premises
• This use case can coexist with Genesys Task Distribution-Workgroup (BO03) for Genesys Engage on premises for Genesys Engage to provide more personalization.
• The source of external context data shall comply with the default external context adapter (PS asset).
• Network communication between Genesys and the source of external contextual data is enabled.

Related Documentation

Agent Desktop

Case Data configuration

• Case Data and Attached Data (Restricted doc)
Workspace Desktop Edition

Case Data configuration

- Case Data and Attached Data

Document Version

- Version v 1.2.4 last updated July 12, 2021
Genesys Dynamic Case Management (BO11) for Genesys Engage on premises

Combine Genesys Omnichannel customer experience with Dynamic Case Management to support human-centric automation, continuous innovation and transformation.

What's the challenge?

Contact center, back office and enterprise employees struggle to handle non-linear and human centric processes efficiently. Customer promises are broken as work falls through the cracks. Employee morale suffers with unfair workloads. Customer experience is suffering because back-office and front-office operations are not well integrated.

What's the solution?

Genesys Dynamic Case Management (DCM) provides a no-code/low-code integration with DCM solutions to automate the distribution of structured and dynamic work. Drive process improvement, improved visibility, and faster case resolution with back-office automation and a single user interface for case management.

Other offerings:

- PureConnect

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 Flow
• 4.5 Business Flow
• 4.6 Business Flow
• 4.7 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 Workspace Desktop Edition
  • 7.3 Reporting
  • 7.4 Document Version
Use Case Overview

Story and Business Context

This functional Use-Case has been created to enable Genesys customers to leverage the back-office automation capabilities to help Supervisors and Employees to better manage cases, through enhanced ways cases are handled in the organization.

By using our dynamic case management solution, Company can improve processes for the resolution of cases by:

- Increasing the level of Automation
- Providing a Single Interface for the resolution
- Breaking the inflexibility of current processes
- Getting a 360° view on the Process Handling and associated SLAs
- Increasing Advisors Satisfaction and Autonomy
- Increasing Supervisor Visibility and Control
- Give agents visibility into other Tasks or People associated with their immediate work

In addition to this, the benefits can be combined with the Workload Management Use-Cases (see BO02; BO03; BO04; BO05/SL05 Use-Cases documentation to get more info).

Different Genesys partners can deliver the DCM component of this Use-Case. While we can integrate with many DCM partners this use case focuses on Eccentex DCM and Appbase offering.

As such, to illustrate this Use Case and make it more tangible, we have provided technical information coming from the Eccentex Platform (in a future release of these Use Case we will introduce technical detail coming from other vendors). If you are interested in another Case Management Solution Providers, Genesys account team will help you to get in contact with our Genesys solution leads.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Customer Experience</td>
<td>Consistent customer experience for nonlinear case management scenarios and channel agnostic.</td>
</tr>
<tr>
<td>Use Case Benefits</td>
<td>Explanation</td>
</tr>
<tr>
<td>-----------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Improved Employee Utilization</td>
<td>Unified desktop and user experience optimized for dynamic case resolution.</td>
</tr>
<tr>
<td>Improved Insights and Visibility</td>
<td>Improved customer visibility of the case and improved employee insights in case handling and management.</td>
</tr>
<tr>
<td>Increased Response Rates</td>
<td>Enforced service level management based on contextual information and business rules to drive response rates.</td>
</tr>
<tr>
<td>Reduced Penalties and Fines</td>
<td>Drive work to be resolved prior to breaching the service level, legal, operational or contractual obligations and optimize the use of your resources.</td>
</tr>
</tbody>
</table>

Summary

The Genesys Dynamics Case Management solution can be provided in the cloud, on-premises or in a hybrid model. DCM brings the omni-process concept, allowing to integrate data and tools into a single user interface. This concept also allows agents and advisors to work on a single application, instead of having to switch from one application to another, to resolve Cases. In the background, DCM orchestrated the flow of information, ensuring that the required information is provided to the agents/advisors at the right time and replicate the new input in the relevant back-end Systems.

Use Case Definition

Business Flow

I. Case Capture

This Use-Case supports two types of Case capture.

(1) Web Form Capture

The first one is by using a web form that could be integrated into your website, portal and or intranet environment.

In the scope of this Use-Case Genesys provides a web form, that allows customer/internal employees to create new cases and provide the required information for case creation.

NB: The integration in the selected website, portal and or intranet portal; the adaption to the company layout and security requirements of this webpage is out of the scope for this Use-Case.

2) Employee capture

The second provided way to capture cases is through a frontline employee.

In this case, the customer gets in touch with the frontline employee through a communication channel (example: voice; email; chat; social; SMS, Apple Business Chat, etc. …). Note that the provisionings of the communication
channel(s) are out of the scope of this Use-Case and could be delivered by Genesys through several other Use-Cases.

Flow Diagram:
Business Flow Description

1. A customer/employee is browsing the company website portal or intranet.

2. On the site, a form is displayed to be completed. By completion, a new instance of that specific case type is started.

3. An automated email is sent to the customer, based on the provided email address in the form for confirmation that the case is now created.

4. After the case starts, a new task is created and sent to a workgroup or Advisor, based on ACD properties like Skill, Priority etc.

5. Advisor picks up the work, wherein their Client application the Task form is shown, for the Advisor to provide all information needed to complete that task.

6. If Advisor cannot resolve the task, it can be Escalated, meaning send the task/case to another (Second Level / Expert) group to work on.

7. If Advisor can complete the task, the case is closed with an automated email with results sent to the Customer.

8. If Expert can complete the task, the case is closed with an automated email with results sent to the Customer, or the Expert can choose the option to send it back to the original Advisor for closure (verification).
Business Flow

II. Case workflow procedure in Eccentex DCM looks like (figure 1):
**Business Flow Description** On each task (Dark Blue) a SLA can be set to meet your business’ SLAs. (Depicted by the green clock icon.) Based on the Employees wrap-up (completion code) on the first task (Resolved, rejected to Escalate) the next step is taken. This step could be automated closure with sending the customer a confirmation email/SMS/Notification with the outcome, or a new task send to an Escalation group.

Figure 2 shows what the initial task looks like.

Figure 3 shows what the “Escalation” tasks looks like.

These tasks can be embedded in the Advisor or Expert contact center application (like WDE, WWE, Interaction Desktop, or Interaction Connect (web)).
Business Flow

III. Case creation
Business Flow Description
For this Use-Case, we have foreseen three ways of initiating a new case. A new case can be created:

1. Via a web form on a public or internal website. By completing this form, a web service call is triggered which creates a new case in DCM via its open API.

2. Via DCM user interface. An Advisor or Expert can create a new case manually. This method can be used if email or voice channels are used. The Advisor (agent) who handles the call or email manually creates a new case. See figure 4.

3. Via the Smart API. This allows the creation of Cases by other back-end systems.
Business Flow

IV. Simple, Advanced Distribution and Advisor Case Handling
Business Flow Description Simple Distribution

This Use Case only comes with a straightforward distribution logic, where tasks are sent to workbins and it is up to the Employees and Experts to ensure they are processing the tasks in accordance to the expectations of the company they are working for. Advisors need to pull tasks from their associated workbin(s).

The escalation monitoring part of the process ensures that tasks are processed in due time, by sending at-risk tasks to experts.

This Use Case also foresee the fact that the supervisor can assign tasks from team workbins to one of their Employees workbin.

NB: this manual assignment is not foreseen in the escalation part of the process. So, each escalation expert is supposed to choose tasks from one or more escalation workbins (see escalation Process Part for more info).

Advance distribution

The advance distribution can only be implemented if one of the optional Workload Management distribution Use-Cases has been selected and is deployed at the same time as this DCM Use Case.

In this section, we will only highlight some of the benefits of combining this Use Case with a workload distribution Use Case:

- No cherry picking
- Ensure that employees and experts are working on the most important tasks for the company first
- Measure employees and experts handling time
- Enabling workforce management/optimization for employees and experts
- The push of tasks reducing allocation bias and idle time
- Automatic assignment of tasks
- Employees performances visibility for the employee as well as for the Supervisors
- Fair distribution of tasks
To get more information on these High-level benefits, please refer to the Workload Management distribution Use Cases (the Workload management Use-Case: BO02; BO03 and SL05).

Besides this, we also need to mention the following benefit of combining Use Cases:

- Reduction in the number of groups to be configured in DCM

As distribution takes other parameters into account (Like for instance Language and Case_Type), it is not needed to multiply the number of target groups to support the different possibilities.

For example: Enterprises no longer need to foresee different target groups for all the languages and/or segments you are supporting for a specific case type. The routing engine considers the Skills (Languages, Segments...) and proficiency levels of the advisors in the task distribution.

**Advisor Case handling**

**Simple Case Handling environment**

The Eccentex platform comes with its own Advisor environment, where Employees can review and manage the tasks to which they are assigned. With access rules, it is possible to provide the right visibility and capabilities to each of the people involved in the handling of the case.

**Advanced Case Handling environment.**

If a Workload Management Use Case is deployed with this BO11 Use Case, beyond the additional routing and distribution capabilities, new capabilities are also provided to the Employees.

With the Workload Management Use Case, an Advisor(Agent) toolbar is provided. With the toolbar, Employees are able to easily log in and put them self in the desired mode (for instance selecting their login status and ready state, communicate with colleagues...). They are also able to interact with customers easily if some communication channels are available. Once they receive new tasks, they can get preview information and contextual...
information to provide enhanced customer experience.

Note that all Standard Case Handling capabilities are kept unchanged as the Eccentex DCM interface appears in a frame of the Advisor/Agent toolbar like show in the below example.
Business Flow

V. Escalation Process
Business Flow Description Escalation criteria

The following escalation criteria are foreseen in this Use Case:

• Operation level agreement (OLA) for the task.
  
  • If a task is not performed in OLA time automatic escalation of the task, OLA monitoring can escalate the task at any step of the normal handling flow. The only exception to this is if an advisor is currently effectively working on the task (task’s screen open and active on the desktop). In this case, the task is subject to escalation if the Advisor does not finish the case before closing the task window. As there is only one escalation mechanism, escalated tasks cannot be further escalated. Note: Adding Genesys Engage BO02 to this use case provides significantly more escalation options. OLA should be smaller than Case SLA, to allow sufficient time for experts to resolve the case. SLA and OLA can be defined in Open Office time or Calendar time. (Allowed format: Days; hours; Minutes)

• Advisor manual escalation.
  
  • An Advisor, when handling a task, can decide to Escalate the task, if they think it is appropriate, to secure in time Case Resolution.

Detail escalation process

Once a task has been escalated, it always follows the same escalation path. The target escalation expert group can be determined based on the case type.

Note: adding BO02 to this use case allows for escalation based on any metadata or context around the case.

<table>
<thead>
<tr>
<th>Case_Type</th>
<th>SLA/OLA_Type</th>
<th>Handling_Target</th>
<th>Escalation_Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical</td>
<td>16 hours</td>
<td>Open office time</td>
<td>Employees group A</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Expert group X</td>
</tr>
</tbody>
</table>
Once one of the escalation criteria has been met, the associated task is escalated, and the task is sent to the escalation target. The experts associated with this target then receive the escalation in their inbox and are responsible for handling it as quickly as possible. Supervisors are able to monitor the tasks (Normal and Escalated) through the reporting interface, based on the input they are able to assign or remove additional Employees or experts. They are also able to change the task's Targets and OLA/SLA.

Live notifications

At several steps in the process, notifications can be activated. The activation of the different notifications can be done based on the Case type. Administrators or supervisors can alter the content of the notification messages. Assuming several notification channels are available, the selection of the notification channel can be done based on case type (communication channels will not be delivered in the scope of this Use Case).

The content of the different live notification messages can be configured by the administrator or supervisors.
The message is the same for all case types, but the message supports the following variable information:

- Case_Type (Example: Technical, Finance, Replacement)
- Case_Description (Example: technical issue...)
- Case_Id (Example: 1234566 2346)
- Case_SLA (Example: 12)
- Case_SLA_format (Example: Days, Hours, Minutes)
- Case_SLA_Type (Example: Open office time/calendar time)
- Case_Target (Example: Finances_group_B)
- Case_Creation_Date
- Case_Creation_Time
- Case_Status

Other variables coming from the Case creation forms (Maximum of 20 fields. This is not a technical limitation, for more than 20 fields, additional PS effort is required.)

Example of variables that could be captured in the creation form:

- Customer_Name
- Customer_Firstname
- Customer_Id
- Customer_Email
- Customer_Segment
- Customer_request_description
- ...

Example of Message:

Dear,

With this email, we want to confirm you that an ACME ticket has been created for your request. at . The related identifier for your ticket is the following.
You will get an answer from us in the timeframe.

Best regards

The ACME Company

**Portal Case status dashboard frame**

This Use Case can also come with case status dashboard for the customer, this dashboard is only applicable if the customer has been identified during the case creation and if the company is providing personalized portal capabilities to their customers. In this case, the DCM platform can provide a Web dashboard with all the cases associated to this customer and the status of these cases.

Any combination of the Case Variables and Case Creation Variables can be presented in this dashboard.

Case_ID; Case_Status; Case_Type; Case_SLA....

Note that the integration of this Case status Dashboard in the existing company portal is not covered in the scope of this use-case. This integration can be done or by customer resources or partner resources.

**Business Flow**

**VI. CRM-Light-customer profile storing**

**Business Flow Description** The DCM Platform comes with an out of the box CRM Light capability. It allows the storing of customer profile data, which can be used in this case management process (like customer search, case report based on the customer).

In the scope of this Use case, it is foreseen to allow the addition of up to five fields to the default Customer profile data template (more fields can be added but this would be subject to a separated quote).
User Interface & Reporting?

Agent UI

Agents must have the following capabilities:

- Unique user name and Password from which their login status derived.
- Ability to set status such as Ready, Not Ready, After Call Work, Logged off, and Not Ready with a reason such as "Meal".
- Back end to track time in status.

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. The reports 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 add report widgets to your dashboards quickly.

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

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 you can use assess case volumes and statistics.

Some of the most relevant reports include:

- **Self-Service Statistics Report** — Learn about the number and percentage of interactions that enter the Designer Application and and concluded in the Self-Service phase, compared to the number that enter the Assisted-Service phase and are routed to a DN or agent.
- **Predictive Routing A/B Testing Report** — Includes a First Contact Resolution Rate calculation, which allows you to quickly see how often customer concerns were resolved on the first attempt, and allows you to contrast interactions
that were processed when Predictive Routing was switched ON compared to when it was OFF. The report also profiles response time, engage time, wrap time, and other relevant Key Performance Indicators (KPI).

- **Customer Perspective Report** — Summarizes contact center milestones from a customer perspective, providing the average response times, revenue and customers satisfaction scores, and various service level percentages of interactions that enter or begin with the contact center. This report also provides such summary values as the average revenues generated by each customer segment, by media type, and to evaluate the average customer satisfaction scores. Attributes applied to these metrics include customer segment, service type, and media type.

- **Business Metrics Executive Report** — Highlights exceptions to service level by business result, customer segment, and service type for those interactions that have defined a baseline service objective that is greater than zero (0). The Entered with Objective metric enables you to gauge service level within the perspective of the total number of interactions that were offered to resources, by day, over the reporting interval.

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

- Other reports relevant to this use case are found in the Agents, Business Results, Detail, and Queues folders.

- Genesys CX Insights provides tools to create tuned reports for specific reporting needs. For more information, see Customizing reports and the Genesys CX Insights 9.0 Projects Reference Guide, or for assistance, contact your Genesys representative.

For more information about Genesys CX Insights, see Genesys CX Insights 9.0 User’s Guide.

For information about customizing reports using attached data: Using Attached Data.

### Customer-facing Considerations

#### Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>Digital</td>
<td>Digital</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>Genesys Work and Lead Distribution (BO02)</td>
<td>• Genesys Email Routing (CE16)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Genesys Task Distribution-Workgroup (BO03)</td>
<td>• Genesys Chat Routing (CE18)</td>
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<tr>
<td></td>
<td></td>
<td>• Genesys Social Media Routing (CE19)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Genesys Personalized Digital Routing (CE20)</td>
<td></td>
</tr>
</tbody>
</table>
### General Assumptions

- Compatibility with DCM hardware and software requirements.
- Customer should allow access to the DCM Platform for their users, involved in the process.

This Use-Case does not include any system integration.

The case submission web form and web dashboard (provided in scope of this Use-Case) will not be integrated into the existing web environment of the customer. On request of the customer, this integration could be done by Genesys resources, but this will be subject to a separate quote by Professional Service. Customer may also choose to realize this integration with its own or partner resources.

The customer should provide the communication channel(s) for the customer notification (like Email, SMS and notification gateways).

If relevant, notification channel(s) are available, the Use-Case supported the following notification types:
Genesys Dynamic Case Management (BO11) for Genesys Engage on premises

- Email (requires getting customer email);
- SMS (requires getting customer Mobile number);
- Mobile notification (requires getting customer Mobile number).

Note that Genesys can provide, in option additional routing capabilities for this notification channels (see Use Case interdependencies section for more info).

This Use-Case foresees only:

- one submission form,
- one case status web Dashboard form,
- Five Case-Types, with one common case process.

If additional Submission form(s), case dashboard(s) and/or cases process are requested they can be purchased as add-ons to this Use-Case.

Cases can be routed up to 5 different target group(s) of Employees plus one escalation group. (If additional groups of Employees are required they can be purchased as add-ons to this Use-Case).

The numbers of Employees and Supervisors are unlimited, but each agent and supervisor should be equipped with a valid license.

The maximum number of information fields requested in the Case creation (Web form or agent creation form) is limited to 20. Each of these fields can be made mandatory or not and can be submitted to classical format verification (example: date format, drop-down list, membership number format...). Not that format validation should happen in DCM, as integration to external systems is out of scope of this Use-Case.

Note that Complex field validation algorithm can be supported but, in this case, the algorithm should be provided by the customer. This part of the code remains under the responsibility of the customer.

Document or photo upload is supported by default in this Use-Case, so advisors and Customer can attach digital document to the case.

DCM can also provide advance capabilities in this areas which are out of scope of this Use Case like; document scanning, indexing, Image editing, Format changed. This can be added to the customer implementation but will be subject to a separate quote by professional service.

If required, this could be delivered as an add-on to this Use-Case (this might also require additional licenses purchase).

No data upload is foreseen to populate the CRM light information (this can be done or by the customer or by Professional Service but is subject to a separate quote).

**Use Case Interdependencies**

This use case can be sold as standalone.

However, it is recommended to sell it with one of the Workload Management Use Cases.

See table below to review the compatibility and the availability of the Workload Management Use Case.
For Genesys Engage on-premises, an outbound email channel license will be delivered for each IWD license purchased.

As stated earlier in this document, this Use-Case supports Notifications via Email, SMS and Mobile Notifications. It is, however, the responsibility of the customer to provide access to the relevant Gateways (Email; SMS; Mobile Notification).

If direct communication is required between the Customer and the Case Worker, it is recommended to select the relevant additional Genesys Use Cases to orchestrate the communication channels. This will ensure that:

- Customer replies are routed to the relevant Advisors,
- Customer interactions are stored in a central place: Universal Contact Server.
- Provide Advisors with an intuitive and easy to use desktop tool to initiate and professionally manage the interaction.
- Provide Standard response library

and many more capabilities, depending on the additional Use-Cases selected. Please find below a list of possible use cases for the different platform.

<table>
<thead>
<tr>
<th>PureConnect</th>
<th>Genesys Engage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Premise</td>
<td>BO02</td>
</tr>
<tr>
<td></td>
<td>BO02; BO03</td>
</tr>
<tr>
<td>Cloud</td>
<td>BO02</td>
</tr>
<tr>
<td></td>
<td>Coming Soon</td>
</tr>
</tbody>
</table>

Note that this list is here only for the indicative purpose, contact your account team to get the list of relevant use cases for your configuration.

Customer Responsibilities

N/A
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

Workspace Desktop Edition

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

- Workspace Desktop Edition Agent Help

Reporting

For more information about the difference between Real-time Reporting with Genesys Pulse, and Historical Reporting with Genesys CX Insights, see Real-time and historical reporting.

Document Version

- Version V 1.0.2 last updated July 12, 2021
Genesys Email Routing (CE16) for Genesys Engage on premises

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.

Other offerings:
  Genesys Cloud Genesys Engage cloud PureConnect

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
• 4.4 Distribution Flow
• 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 Workspace Desktop Edition
  • 7.3 Document Version
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. Genesys can improve handle time, first contact resolution, agent utilization, and customer satisfaction by routing email interactions to the best agent, systemizing automatic acknowledgement, automating responses, and supporting the ability for supervisors to quality review agent responses for training, coaching, and to support the company's goals for the ideal customer experience.

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:

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

Summary

A customer sends an email to a company email address. The email is captured by the Genesys system and a content analysis is performed to assign a category to the email. It is then queued to the best available agent with the skill set corresponding to the category. After the agent has compiled the email answer, a supervisor may review the email depending on the agent. Priority tuning functionality can improve the service level adherence to customer's emails. The reporting functionality of this use case provides management visibility into the email interaction channel to drive further improvements.

The use case includes the optional enhancement to use Natural Language Processing to identify the email category. This requires additional licenses and services efforts.
Use Case Definition

Business Flow

(1) This flow describes the use case from the perspective of the user and contact center agent.

The diagram shows the business flow of the use case:
Business Flow Description

1. A customer sends an email to one of the public addresses (such as orders@abc.org) monitored by the Genesys Email solution. Alternatively, he can submit an email using a web form based on Genesys widgets.

2. Genesys periodically checks corporate inboxes for new emails using POP3, IMAP, or Exchange Web Services Protocol.

3. The new email is captured by Genesys including “From”, “To”, and “Subject” as metadata.

4. Genesys verifies if the corresponding user already exists as a contact within the Genesys Universal Contact History (by email address). If the contact does not exist yet, Genesys creates the contact. The email and any answer by the agent is attached to the contact.

5. The system verifies if the “From” email address is on the email blacklist. Emails from blacklisted email addresses are not distributed to agents.

6. The system checks if the email is a new email or a reply email.
   - In the case of a new email, the system analyzes the content to classify the email.
   - In the case of a reply email from the customer, the system attempts to route to the previous agent.
   - In the case of an automatically generated reply email, the email is not distributed to an agent and the flow stops.

7. The system sends out a receipt acknowledgement email to the customer with a predefined template for the “To” address.

8. Once an agent with the requested skill is available, the email is routed to the agent's workspace application with screen pop showing “From”, “To”, and “Subject” information. Any available contact information from the Genesys Contact History (customer name, for example) and previous contact history is also displayed.

9. Once the agent reads the email, he or she needs 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. The agent sets a disposition code to mark the business outcome for reporting purposes.

11. After the agent sends the email, the email can be passed to a supervisor for review before sending it to the user. The decision is made based on the agent.

Business Flow

(2) Email Auto Response
Business Flow Description

1. The consumer sends an email to one of the company's email addresses.

2. The Genesys system monitors the mailboxes that handle these consumer messages.

3. When a message arrives, the request is captured with context data, and the routing strategy determines how to handle the request. The strategy tries to identify the consumer in Genesys contact history. If the consumer does not yet exist in the database, a new record is created. Optionally, a web form gathers additional information (such as language) about request elements such as case, reason for contact, and location.

4. The original message is stored in the Genesys contact history.

5. If this is a new message (not a reply), the content analyzer compares the message to a series of models to determine the intent (classification) of the message. It may also use models to determine sentiment and actionability of the message. The result of these comparisons is a numeric confidence level from 1 - 100.

   - If the inbound email is a web form email and the Language field is populated, then the content analyzer model uses the specified language.

   - If the language in the user data is not populated (either because it comes from a direct email server or because the web-form cannot ascertain the language), the Language Classification model classifies the language.

   - The content analyzer model (root category configured in OPM) and language are determined.

6. Depending on the confidence level, Genesys takes one of the following actions:

   - Sends an automated response to the consumer.

   - Sends a suggested response to a live agent for their review.

   - Sends the message to an agent allowing them to manually select a standard response. Optionally,
responses can contain links to Knowledge Center for related content (requires Knowledge Center).

7. If the confidence level falls below the auto-response threshold, the system sends the email interaction for distribution to an agent. See Engage/CE16 Email Routing (CE16).

8. If the confidence level exceeds the threshold, the system sends the automated response to the consumer, ideally using the original To: address as the From: address, enabling the consumer to respond easily.

9. Genesys stores the response in the contact history.

10. If the incoming email is a reply to a previously sent response, the message is routed directly to an agent, bypassing the review steps 5 and 6.

11. The agent receives the customer message (with or without a suggested response) and reviews any response for accuracy and relevance.

12. The agent can include the suggested response in their reply. If a suggested response is not available, the agent creates the response and sends it to the customer. If no reply is needed, he finishes the interaction by simply entering “Mark Done”.

13. The agent records the outcome of the interaction for reporting purposes.

14. Genesys stores the response in the contact history.

Business and Distribution Logic

Business Logic

In the logical flows in the previous sections, there are a number of 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 a set of mailboxes for new emails. The following configuration options are available:
• Address of email server for mail box
• Authentication details for mail box
• Protocol for communication (POP3, IMAP, Exchange Web Services Protocol)
• Delete email (any emails captured by Genesys are deleted from the mailbox)
• Polling frequency (how often the mailbox is checked for new emails)
• Maximum size (the maximum size of emails accepted by Genesys). Emails larger than this size are left in the mailbox and not captured by Genesys

Blacklist

It will be possible to configure and manage a blacklist of e-mail addresses. An administrator can add / delete e-mail addresses from this blacklist. E-mails coming from an address on the blacklist will not be distributed to agents.

Automatic replies

In step 4a, the Genesys system checks for automatic / system replies from the mail server to automatically stop email processing when no agent intervention is needed.

This includes:

• Detection of automated answers to prevent “ping-pong” between mail servers by answering with auto-acknowledge on e-mails of type auto-response or auto acknowledgement.
• NDR Handling (Non-Delivery Report Handling): The system recognizes automatic responses due to failed delivery (assuming these automatic responses are following standards).

Email Categorization

There are two methods of categorizing emails: Advanced Content Analysis and Keyword Matching. This is a system wide setting and only one method will be used at any given time. Configuration of up to twelve different categories are supported within the scope of this use case. Additional categories can be added by the company or by Genesys Professional Services on request.

Keyword Categorization

Keyword matching allows the system administrator to configure a number of screening rules to identify emails belonging to different categories. E.g. an email that contains the word “order” in the body of the email, would be categorized as a sales email. Screening rules can be configured to look for regular expressions that look for different words or phrase patterns that help categorize emails. Screening rules will be applied to the e-mail body and subject.

Additionally, screening rules can be used to detect patterns like credit card numbers, customer ID, and account number to be able to mask sensitive information to the agent. Configuration of up to three regular expressions to display to the agent / mask information are within the scope of this use case.
Advanced Content Analysis (optional)

Advanced Content Analysis is an optional extension to Keyword Categorization. This option requires additional licenses and services effort.

Incoming Email is analyzed using natural-language processing (please see the comments on supported languages below) to analyze the e-mail body. The result of analysis is an assignment to one or more categories of the category structure.

Content Analyzer creates its analysis algorithms by training: that is, by working its way through a number of emails that are classified according to the category system.

Training operates on a training object, which is a category tree and a group of emails classified using that category tree. A training object combines a category tree and a set of text objects, with each text object assigned to one category in the tree (categorized). The text objects are typically emails, but you may choose to have the set of text objects also include the standard responses associated with the category tree.

Training scans the text objects and forms a statistical model of the words and phrases that tend to occur in each category.

There are five possible sources of categorized text objects:

- Emails that have been assigned to categories
- Text objects (in the form of emails) that are created in Knowledge Manager
- Responses that are used when creating standard responses
- Objects that are used when creating other training objects
- Emails that are categorized when adding uncategorized emails using the Training Object Data Analyzer

The result of training is a model. This classification model - a statistical representation of a category tree - is applied to an incoming email and produces a list of the categories that the interaction is most likely to belong to. Each likely category is assigned a percentage rating indicating the probability that the interaction belongs to this category.

An email will be assigned to the category with the highest percentage of probability if this percentage is above a configurable threshold. Otherwise it will be categorized with a default category.

QA Process/Supervisor Review of Outbound Emails (Configurable by agent)

After an agent completes an outbound reply email, the system checks the agent configuration and if the agent is marked for the QA process, the email is queued for a supervisor to review or distributed into a supervisor workbin. If the e-mail cannot be distributed to a supervisor within a specific time frame or if he does not pull the e-mail from his workbin within this time frame, the e-mail will be sent automatically to the customer.

The supervisor has the option to edit the email then send to the customer, or add some notes and send back to the original agent. If the email needs to be sent back to the original agent, the supervisor will set a specific disposition code. Genesys routing functionality will attempt to distribute the email back to the original agent. If the agent is not available, the target can be expanded to the pool of agents for the respective category.

The system administrator can configure for each agent whether to enable/disable the QA function.
Standard responses

The Genesys Workspace displays standard responses available to the agent, grouped by category. Standard Responses accepts parameters, such as Customer Name, which will be 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 target
- Supervisor skill / skill level for the first, second, third and fourth target
- Overflow timeouts for overflowing from last agent routing to skill-based routing and from overflowing between targets. These timeouts are based on age of interaction.
- Priority tuning parameters
  - Priority increment (the amount to increase the priority after the interval time)
  - Priority interval (the time between priority increases)
  - Priority limit (the maximum priority)
  - Priority start (the starting priority)
- Enable / disable last agent routing
- Time-out for workbin escalation
- Time-out for Supervisor QA check

The following parameter is configurable by the “To” address:

- Auto-acknowledge message

Confidence Level Threshold

It is assumed that an automated response would only be sent if the confidence level is high, where a suggested response would be sent to an agent if the confidence level isn't high enough to warrant an automated response, but high enough to send to an agent as a suggestion. To do this, two confidence level thresholds must be configured in the strategy for the following actions:

- The first threshold indicates the minimum confidence level required for an automated response to be sent to the customer. For example, 80 would indicate 80 percent confidence.
- The second threshold indicates the minimum confidence level required for a suggested response to be sent to an agent. For example, 60 would indicate 60 percent confidence.

If the confidence level is below both thresholds, the email inquiry is forwarded to an agent without a suggested response.

Distribution Flow

The following flow describes the logic for the distribution of emails to the best available agent.
Distribution Flow Description

1. The system checks if the email is a reply email.
   1. If yes, and last agent routing is activated for the category, the system waits for the last agent. If the last agent is not available within a configurable time-out, the system targets all agents with the required skill set for the category of the email.

2. The system waits for the best fit agent defined by the skill and skill level for the requested subject until a specified timeout is reached. The required skill and skill level is defined per category.

3. The potential pool of agents is expanded via reducing the requested minimum skill level. The system will wait for an agent until a second timeout is reached.

4. The potential pool of agents is expanded via reducing the requested minimum skill level. The system will wait for an agent until a third timeout is reached.

5. The potential pool of agents is expanded a last time via reducing the requested minimum skill level.
Distribution Logic

Draft work bin and escalation

If the agent cannot complete an e-mail, she can store the e-mail in her personal workbin. When she needs to access the e-mail, she can pull it from her workbin and continue working on it.

To avoid that tasks are stuck within a workbin, e.g. if she is sick or on PTO the next day, the work bins are automatically emptied after a configurable time out. Distribution of the task resumes according to the normal distribution logic described above.

Distribution of e-mails for Supervisor QA

E-mails, which need to be distributed to supervisors for quality check, will be routed similar to the logic above. This means they will be distributed to a supervisor skill for the specific category with the option for overflow to lower skill levels.

Additional Distribution functionality

The following lists additional functionality for the distribution logic:

- Re-route on no answer (RONA) -functionality: 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. The priority of the email can be increased by a configurable parameter.
- Blending with other media types is possible.
- Priority tuning can be configured via the following parameters:
  - Priority increment (the amount to increase the priority after the interval time)
  - Priority interval (the time between priority increases)
  - Priority limit (the maximum priority)
  - Priority start (the starting priority)
- Transfers are possible to another category, i.e. to agents satisfying the skills of another category. In case of transfer, the priority is increased to a configurable parameter.

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
• Transfer to third party outside Genesys.
• Store draft email in personal workbin with review functionality for supervisors
• Interaction Queue Management for supervisors

For Auto Response, Agents can review, edit, and author responses. Genesys agent workspace can handle omnichannel interactions, as well as review and apply suggested responses.

Reporting

Real-time Reporting

Genesys Pulse is a Genesys Administrator Extension (GAX) plug-in application that offers personalized dashboards based on specific functional, geographical or organizational needs. Pulse dashboards present information using graphical “widgets” that can be viewed as graphs or tables, showing information about specific key performance indicators, such as service level, chat interaction handled and the average handle time.

With Pulse you can:

• Monitor the current state and activity of Contact Center objects to help make decisions 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.
• Filter KPIs by Business Attributes such as the Category.
• Use predefined templates such as:
  • Monitor operational Email activity through the Email Queue Activity and the eServices Queue KPIs templates.
  • Monitor Agent resource activity through the Email Agent Activity and the eServices Agent KPIs templates.

The sample Email dashboard below demonstrates usage of the Email Agent Activity and the Email Queue Activity. The implementation of dashboards would be customized based on the deployment.
For Auto Response, there are no defined real-time reporting requirements. The solution must provide near real-time reports reflecting response usage and confidence levels. The following data fields need to be added so that reports may be created by the end user:

- Interaction Queue / Agent Group / Agent
- Category (could also use Service Type / Service Sub Type if these fields are populated by the Category field and applied as a filter in Stat Server)
- Confidence level (applied as a filter in Stat Server)
- Action taken by strategy (applied as a filter in Stat Server)

Note: Filters may be used to group high-, medium-, and low-confidence scores. However, these filters do not apply to Interaction Queue and may be applied only for Agent and Agent Groups. In addition, the out-of-the-box Genesys Administrator Plugin for Content Analyzer does provide reports on the model confidence, precision, and recall.

**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** — Provides 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** — Provides details 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.
- **Interaction Volume Business Attribute Email Report** — Provides detailed information about how interactions that enter the contact center are categorized into the business-result attributes that are configured in your environment, including
analysis (based on the Entered with Objective metric) of the service level within the perspective of the total number of interactions that are offered to resources by day over the reporting interval.

Other reports relevant to this use case include:

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

For more information about Genesys CX Insights and other reports/dashboards, see the *Genesys CX Insights 9.0 User’s Guide*.

### Customer-facing Considerations

#### Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>None</td>
<td>Digital</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Genesys Work and Lead Distribution (BO02)</td>
<td></td>
</tr>
</tbody>
</table>

#### General Assumptions

- Implementation of this use case will be based on the Digital Blueprint Architecture.
- Genesys Infomart and Interactive Insights in place for historical reporting.
- Genesys will capture emails from the corporate email server. The customer is responsible to configure the e-mail server appropriately so Genesys can retrieve the requested emails.
- WDE or WWE will be used as agent desktop.
- Pulse will be used for real-time reporting. Integration with one corporate e-mail server.
- Blacklist: It is assumed that the Blacklist functionality is used for short-term manual handling of emergency cases. It is not intended for long-term or broader spam filtering functionality.
- Spam is handled at the level of the corporate email server. No functionality related to Spam is included within the Genesys implementation.
- If Content Analyzer is used for email categorization: The training model uses a Lexical Analyzer to convert text input from the e-mail to an array of words or stems. Language specific Lexical Analyzers are available in the following
languages: English, Portuguese, Turkish, Italian, Spanish, German and Japanese (requires the Japanese edition of Content Analyzer). For other languages, a default Lexical Analyzer can be used, but this will require more training for reliable categorization. The creation of a custom lexical model is not part of the delivery scope. Text input needs to be available in UTF-8. Customer to provide pre-categorized sample e-mails to train the Content Analyzer language model.

- Assumes that supervisors can monitor and approve agent responses (again leverages requirements from inbound omnichannel interaction use cases).
- Assumes that the environment includes other services required to process email, such as Interaction Server, email server, GMS, or Widgets.
- The use case can route omnichannel interactions (leverage inbound omnichannel use cases).
- Capabilities Assumption: Classification allows you to classify the message against predefined category tree using classification model.
- Please reference Genesys Email Routing (CE16) for Genesys Engage cloud for a list of assumptions.

Customer Responsibilities

- Composer is used for all business processes.
- Rules around handling of confidence levels are managed in the business process (Composer) rather than using Rules Engine as part of the solution.
- Confidence thresholds for referral to an agent and auto-response are both configurable through OPM/GAX.
- Use case includes one classification model with up to 10 categories.
- Use of Knowledge Center would be an add-on.
- Use of Context Services would be an add-on, such as tracking interactions across time and channels covered by Genesys Personalized Digital Routing (CE20).
- The training model uses a Lexical Analyzer to convert text input from the email to an array of words or stems. Language-specific Lexical Analyzers are available in the following languages: English, Portuguese, Turkish, Italian, Spanish, German and Japanese (requires the Japanese edition of Content Analyzer). For other languages, a default Lexical Analyzer can be used, but requires more training for reliable categorization. The creation of a custom lexical model is not part of the delivery scope.
- Text input must be available in UTF-8.
- Customer provides pre-categorized sample emails to train the Content Analyzer language model.

Administrators must:

- Define categories for messages (such as home loan and bill pay).
- Create a Training Data Object and add messages to the object that represent the messages that apply to these Categories.
- Run the training to create the model.
- Periodically update these models with more recent messages to keep them current
Related Documentation

Agent Desktop

Agent Desktop provides agents with the tools they need to manage email and other interactions.

- Email interactions
- Standard Responses
- Customer and interaction history
- Workbins

Workspace Desktop Edition

Workspace provides agents with the tools they need to manage email and other interactions.

- Email interactions
- Standard Responses
- Customer and interaction history
- Workbins

Document Version

- Version ver 1.0.4 last updated July 12, 2021
Genesys Chat Routing (CE18) for Genesys Engage on premises

Route chat interactions to the best skilled resource

What's the challenge?

When customers can’t find the answers they need on your website, they want to speak with someone who answer their questions in real time. Online consumers prefer web chat over other channels of communication. Failure to offer a live chat option results in lost sales and lower customer experience scores.

What’s the solution?

With just a single click, Genesys Chat Routing provides your digital customers immediate access to live help. And because Genesys Chat uses skills-based routing, chat requests can be intelligently routed to the individual best equipped to help.

Other offerings:
Genesys Cloud Genesys Engage cloud PureConnect

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 and Distribution Logic
  • 4.3 Distribution Flow
• **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 Workspace Desktop Edition
  • 7.3 Document Version
Use Case Overview

Story and Business Context

The web chat channel has become an invaluable tool in communicating with and engaging with customers to provide better service for answering questions, completing orders, general guidance on company’s product and features, and personalized customer support. With this solution, Genesys can improve handle time, first contact resolution, agent utilization, and customer satisfaction.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Employee Utilization</td>
<td>Improved agent occupancy due to Asynchronous and long-lived Chat Sessions.</td>
</tr>
<tr>
<td>Improved First Contact Resolution</td>
<td>Improved First Contact Resolution by routing interactions to an expert through skills based routing</td>
</tr>
<tr>
<td>Increased Revenue</td>
<td>Routing revenue-generating opportunities to best resources through skills based routing increases revenue</td>
</tr>
<tr>
<td>Reduced Handle Time</td>
<td>Routing chats to the right skilled agents through skills based routing reduces handle time</td>
</tr>
</tbody>
</table>

Summary

The customer can request a chat session with an agent from the company's web site on a specific topic. The request is routed to the best available agent depending on the subject and the agent skill. The agent will be provided with the customer context (requested subject).

Use Case Definition

Business Flow

The following flow describes the use case from the perspective of the main actors, i.e. the customer and the contact centre agent.

The following diagrams shows the business flow of the use case:
Business Flow Description

1. The customer requests to chat with a live agent via the web page.

2. Customer enters his data via a registration window. The data he can enter are: Last name, first name, nickname, subject and e-mail address.

3. Genesys uses the subject to determine the parameters for routing of the chat request (see chapter “Distribution logic”).

4. Genesys will check if last and first name is available from the customer
   - If the customer has not provided the information on first and last name the chat session will not be associated to any contact and no transcript will be saved or e-mailed to the customer.

5. If the customer has entered his e-mail address, Genesys will search for the customer in the contact history. If no contact with the same e-mail address is available, Genesys will create a new contact. The current chat session will be associated to this contact and the chat transcript will be stored under this contact.

6. The chat window will pop-up.

7. Genesys checks if agents are logged in for the requested subject.
   - If no agents are logged in at all for the service chat is disconnected and customer is getting a disconnect message.

8. If agents are logged in for the service, routing takes place.

9. The customer gets a welcome message from Genesys system. Welcome text may depend on the subject.

10. Genesys will search for an available chat agent. If no agent is available the chat interaction will be queued (see chapter “Distribution Logic” for the queuing logic)
    - until an agent becomes available. Comfort messages may be sent to the customer during wait time
    - customer ends the chat session (the business flow ends)
11. When the chat request is routed to an agent, he can either accept or ignore the chat interaction. If he does not accept the interaction, Genesys will attempt to route to another agent after a specific time out. The first agent will be set to not ready (RONA). Continue at step 9.

12. If he accepts, the chat session between the agent and the customer is established. The agent can use standard responses based on the subject for the chat interaction with the customer.

13. When the chat session is finished, the agent can set a disposition code to register the outcome of the chat for reporting purposes.

14. If the customer has provided his e-mail address during the registration process, he will receive a transcript of the chat session via e-mail (optional).

Business and Distribution Logic

Business Logic

Business logic and rules determine the distribution of chat requests and the standard responses agents can use. Distribution depends on a combination of agent skill and availability.

Distribution logic

The following table shows the parameters, which can be configured, based on the subject:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skill</td>
<td>Required agent skill for distribution of the chat message</td>
</tr>
<tr>
<td>Min Skill level 1</td>
<td>Required minimal skill level for the first target group of agents</td>
</tr>
<tr>
<td>Max Skill level 1</td>
<td>Required maximal skill level for the first target group of agents</td>
</tr>
<tr>
<td>Time out 1</td>
<td>Time out for waiting for the first target group. If skill level 2 is not configured, the interaction will be disconnected after time out 1</td>
</tr>
<tr>
<td>Min Skill level 2 (Optional)</td>
<td>Required minimal skill level for the second target group of agents</td>
</tr>
</tbody>
</table>
### Parameter Description

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Max Skill level 2 (Optional)</td>
<td>Required maximal skill level for the second target group of agents</td>
</tr>
<tr>
<td>Time out 2 (Optional)</td>
<td>Time out for waiting for the second target group. If skill level 2 is not configured, the interaction will be disconnected after time out 2</td>
</tr>
<tr>
<td>Min Skill level 3 (Optional)</td>
<td>Required minimal skill level for the third target group of agents</td>
</tr>
<tr>
<td>Max Skill level 3</td>
<td>Required maximal skill level for the third target group of agents</td>
</tr>
<tr>
<td>Time out 3 (Optional)</td>
<td>Time out for waiting for the third target group. The chat interaction will be disconnected after the configured time out has been reached</td>
</tr>
<tr>
<td>Disconnect Message (no agents) (Optional)</td>
<td>This message will be displayed to the customer when no agents are logged in for his service</td>
</tr>
<tr>
<td>Welcome message (Optional)</td>
<td>This message will be displayed to the customer when the chat session is started</td>
</tr>
<tr>
<td>Disconnect Message (final time out) (Optional)</td>
<td>This message will be displayed to the customer in case the final time out is reached</td>
</tr>
<tr>
<td>Comfort message 1 (Optional)</td>
<td>This message will be displayed to the customer after the first time out is reached</td>
</tr>
<tr>
<td>Comfort message 2 (Optional)</td>
<td>This message will be displayed to the customer after the second time out is reached</td>
</tr>
<tr>
<td>Chat transcript?</td>
<td>Enable that chat transcripts are sent if the customer has provided his e-mail address</td>
</tr>
</tbody>
</table>

### Standard responses

The workspace will display suggested responses to the agent based on the chosen subject. Genesys will prepare the possibility to associate a specific subject with suggested responses using examples. The standard responses will need to be provided by the customer.

### Distribution Flow

Then following diagram shows the distribution logic, which will be implemented in case the chat interaction, needs to queue for an agent:
Distribution Flow Description

1. The system will queue the chat request.
2. Once an agent with the required skill / skill level becomes available, the chat will be distributed to the agent.
3. If it cannot be distributed before the timeout, a comfort message can be sent automatically to the customer.
4. The potential pool of agents can be expanded via expanding the requested skill levels. The system will wait for an agent until a second timeout is reached. If the timeout is reached, a second comfort message can be sent automatically to the customer. Up to two expansions/comfort messages can be configured.
Distribution Logic

Operational hours

The following information can be configured to inform the customer if the contact center is out of operational hours once he initiates a chat request:

- Emergency Flag: If this flag is set, a special message is sent to inform the customer about the condition
- Special Days: Special Days (e.g. public) holidays can be configured, in which the contact center is not operational. If a customer requests a chat on a special day, a corresponding message will be sent to him.
- Operational Hours: If the customer requests a chat outside of the operational hours, a special message will be sent to him.

Additional Functionality

The following lists additional functionality for the distribution logic:

- At every step above the distribution logic will look for agents with the requested skill and a skill level within the boundaries of a maximum and a minimum required skill levels.
- The skill, minimum and maximum skill levels and timers will be configurable by subject (see chapter “Business Logic”). The second and third target are optional.
- Re-route on no answer (RONA) - functionality: If an agent does not accept the chat interaction, the chat interaction will be automatically put back into the distribution flow after a time out. The agent will be set to not-ready.
- Blending with other media types will be possible. Priority settings for chat interactions will be configurable to enable proper priority ranges between different media types. Capacity rules will be configured for the agents / agent groups to define what interactions can be handled in parallel (if any).

User Interface & Reporting?

Agent UI

The following lists the minimum requirements for the chat interface:

- Access to Universal Contact History
- Configuration of not-ready reason codes (for example: Admin Work, Lunch, Meeting, Pause, RONA and Training).
- Configuration of disposition codes to report on business outcome (for example: Cross Sell, Need Follow-Up, Not Right Skill, Processed, Terminated, Transferred, Up Sell)
- Access to standard response library
- Setting Threshold Alarm to alarm agents on pending responses for chat
- Agent to agent transfer
Reporting

Real-time Reporting

Premise

**Pulse** is a Genesys Administrator Extension (GAX) plug-in application that offers personalized dashboards based on specific functional, geographical or organizational needs. Pulse dashboards present information using graphical “widgets” that can be viewed as graphs or tables, showing information about specific key performance indicators, such as service level, chat interaction handled and the average handle time. With Pulse you can:

- Monitor the current state and activity of Contact Center objects to help make decisions 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
  - Monitor operational Chat activity through the Chat Queue Activity template.
  - Monitor Agent resource activity through the Chat Agent Activity template
  - Monitor Tenant Service Level through the Chat Service Level template.

Below are several examples of Chat dashboards, implementation of dashboards would be customized based on the deployment.

**Example 1:**

![Example 1](image1)

**Example 2:**

![Example 2](image2)
Example 3:
Example 4:

Cloud

Due to the continuous evolution, the features available in Cloud rapidly change. Please reach out to your local Cloud Team for latest information.

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 and measure the effectiveness of the engagement rules and efficiency of the use case.

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 Chat folder, such as:

- **Asynchronous Chat Dashboard** — Use this dashboard to view detailed information about asynchronous chat sessions in the contact center. Asynchronous (Async) chat sessions are single chat sessions between a customer and a contact center that last for a long period of time (potentially several days). Agents can return a chat session back into the workflow (into a dormant state), and then reconnect to the session later.

- **Chat Engagement Report** — Learn more about the number of chat engagements agents had, and the duration of each. Sessions can contain more than one *engagement*; each engagement represents an agent's participation in that part of a session.

- **Chat Message Statistics Report** — Learn more about how chat is used in the contact center.

- **Chat Session Report** — Learn more about the volume of chat sessions handled in your contact center within a specific time period, including details about the number of messages within chat sessions, and about how often chat sessions were missed or transferred.
• **Chat Termination Report** — Use this report to learn more about how interactions were terminated; whether by the client, by the agent, due to inactivity, or for some other reason.

• **Interaction Acceptance Dashboard** — Understand how long it takes for agents to accept customer interactions, and to identify what percentage of interactions are accepted promptly, or with some delay.

• **Interaction Acceptance Report** — View statistics about the acceptance of interactions by agents, including the amount of time it takes for agent to accept interactions, and the number and percentage of interactions that were accepted quickly, or with a delay.

• **Pre-Agent Termination Report** — Learn more about calls that terminated before connecting to an agent.

Other reports relevant to this use case include:

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

For more information about Genesys CX Insights and other reports/dashboards, see the *Genesys CX Insights 9.0 User’s Guide*.

**Customer-facing Considerations**

**Interdependencies**

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>

**General Assumptions**

• Implementation of this use case will be based on the Digital Blueprint Architecture

• Genesys Infomart and Interactive Insights in place for historical reporting

• WDE or WWE will be used as agent desktop

• Pulse will be used for real-time reporting

• Use of Genesys CX widget with limited modification to the company’s corporate identity as described in chapter “User Interface Requirements”.

• No integration with third party systems

**Customer Responsibilities**

• Genesys customer will handle the integration of the solution into his web site,
• Provision and configuration standard responses in Genesys Knowledge Manager

Related Documentation

Agent Desktop
Agent Desktop enables agents to handle chat interactions.
• Chat interactions
• Standard Responses
• Customer and interaction history

Workspace Desktop Edition
Workspace enables agents to handle chat interactions.
• Chat interactions
• Standard Responses
• Customer and interaction history

Document Version
• Version V 1.0.3 last updated July 12, 2021
Important
The PS material for this use case has not been finalized. Please contact your local CSD for effort estimates and scope details of this use case.

Engage with your customers through social channels

What's the challenge?
As the volume of social network interactions continues to escalate, it’s clear that simply throwing more people onto Twitter and Facebook is not a sustainable solution — there needs to be a new evolution to a scalable model for managing social engagement.

What's the solution?
Monitor your business presence on relevant social media sites and easily identify and prioritize online comments. Automatically routing social media interactions across the enterprise to the right people brings new levels of scalability, consistency and responsiveness in your social media interaction strategies.

Other offerings:
Genesys Engage cloud PureConnect

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 Agent Desktop
  • 7.2 Workspace Desktop Edition
  • 7.3 Document Version
Use Case Overview

Story and Business Context

This functional use case enables companies to use Genesys Social Engagement to provide a consistent customer service experience across social media sites.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Customer Experience</td>
<td>Provide consistent CX across social networks by providing agents customer info and social context.</td>
</tr>
<tr>
<td>Improved Employee Utilization</td>
<td>Deliver interactions to the best available resource with escalation to other channels when needed.</td>
</tr>
<tr>
<td>Improved First Contact Resolution</td>
<td>Improved First Contact Resolution by routing interactions to an expert through skill-based routing.</td>
</tr>
<tr>
<td>Increased Revenue</td>
<td>Increase revenue and reduce customer churn with improved resolution of business outcome.</td>
</tr>
<tr>
<td>Reduced Administration Costs</td>
<td>Eliminated manual monitoring/reporting by automating efforts through Genesys Social Engagement</td>
</tr>
</tbody>
</table>

Summary

Consistently provide customer service across Twitter and Facebook by delivering interactions to the best available resource with social media public and private messaging. Agents are able to advice customers based on customer information and social media context. Standard responses enable your agents to provide consistent response to customers engaging via Facebook or Twitter.

Use Case Definition

Business Flow

(1) Business Flow - Twitter / Facebook Message

The following flows describe the use case from the perspective of the main actors, i.e. social media user and contact center agent.
The first flow shows how a Twitter message is handled:
Business Flow Description

1. The user searches in Twitter/Facebook for the company's handles. User will post/tweet to the attention of the company, by posing a customer care issue.

2. User will post/tweet to the attention of the company, by posing a customer care issue.

3. Genesys monitors the Twitter/Facebook handles via predefined events and filters the message using keywords to determine actionability.

4. Genesys verifies if a corresponding contact already exists in Genesys Contact History. The customer will be identified in the contact history by his Facebook / Twitter handle (if available)
   - If a contact does not exist (social handles are not associated to a registered user), Genesys creates a contact in the Universal contact database based on the customer data. Any following messages and agent replies are stored under this customer.

5. Genesys verifies if the day is a normal operational day. If not, a special day message can be sent stating that the message will be answered once the service is back online. The special day message can be sent either publicly or in private mode.

6. Genesys has the ability to determine if the operating hours of the service match the current time and day. If not, a standard message will be sent in response stating that the message will be answered once the service is back online. This message can be sent either publicly or in private mode.

7. In addition, it is possible to define an emergency message that will be sent once the emergency process is activated. If the emergency setup is invoked, then the system can answer with some emergency message either publicly or in private mode.

8. Genesys will search for an available agent with the correct skills.
   - If an agent is available, the interaction is routed to an agent.
   - If no agent is available, the interaction is queued until an agent becomes available.
9. The interaction is sent to the agent for appropriate response.

10. The agent will decide if the interaction requires private comments.
   • If no private answer is required, he will reply via the company facebook page or company’s twitter handle
   • If private messaging is required, the interaction will be moved out of the public comment space and will be dealt with via private messaging (Twitter DM/FB messenger. See separate flow for FB messenger)
     • Best practice for the agent is to respond to a public message with a public response, indicating that the conversation might be moved to private.
     • The agent also has the ability to simply “like” the user comment, if this was considered as positive and no specific answer required.
     • Otherwise, no further action is taken.

11. When the interaction is finished the agent can set a disposition code to register the outcome for reporting purposes.

Business Flow

(2) The next flow shows the handling of a Facebook message:
Genesys Social Media Routing (CE19) for Genesys Engage on premises

Business Flow Description

[Flowchart showing the process of handling social media messages]
Business Flow

(3)
Business Flow Description

Business Flow Description – Reply with Facebook Messenger

1. User will send a facebook message to the company (e.g. after having been asked by an agent to connect privately).

2. The message will be stored with the customer contact in Genesys contact history.

3. Genesys verifies if the day is a normal operational day. If not, a special day message can be sent stating that the message will be answered once the service is back online. The special day message will be sent via facebook messenger.

4. Genesys has the ability to determine if the operating hours of the service match the current time and day. If not, a standard message will be sent in response stating that the message will be answered once the service is back online. This message will be sent via facebook messenger.

5. In addition, it is possible to define an emergency message that will be sent once the emergency process is activated. If the emergency setup is invoked, then the system can answer with some emergency message via facebook messenger.

6. Genesys will search for an available agent with the correct skills.
   - If an agent is available, the interaction is routed to an agent.
   - If no agent is available, the interaction is queued until an agent becomes available.

7. The interaction is sent to the agent for appropriate response.

8. A Facebook chat session is established between the customer and the agent.

9. When the interaction is finished the agent can set a disposition code to register the outcome for reporting purposes.
Business and Distribution Logic

Business Logic

This chapter describes the business logic and business rules, which drive the decisions made by the Genesys system within the business flow above, that is, the rules, which are used to determine if a chat invite message is sent to a visitor.

The first part describes the engagement rules of the social customer care. The second part describes any additional rules verified before the final decision.

For information about setting up and using social media channels in Genesys Engage on-premises, refer to the following articles:

- Set up Twitter and Facebook channels
- Handle Twitter interactions
- Handle Facebook interactions

Engagement Scenarios

The following 4 scenarios describe typical social customer care engagement which have been used successfully.

Scenario 1: Twitter - tweet to company

This scenario depicts an engagement when the customer is tweeting to the company's handle.

The customer uses their account to post a message.

Genesys Social Engagement captures this message according to predefined business logic (see below) and evaluates actionability.

Customer profile details are received with the message through the Twitter API. The profile details are attached to the interaction. The twitter message will be stored in the Genesys Contact History.

The original incoming twitter interaction is delivered to the agent desktop. The desktop identifies that this message was directed to the business and if the author is a follower of the business' twitter account

The agent reads the incoming twitter message and sends a public response. Alternatively, he/she may mark the tweet as “favorite” (Like), and/or mark this interaction as “Done”, assign a disposition code and not take any further action.

The workflow creates an interaction an outgoing twitter interaction and associates it with the same customer contact.

Genesys Social Engagement sends the reply back to the customer.

Scenario 2: Twitter - Direct Message (DM) to company

In this scenario, a customer is sending a DM to a company's twitter handle. Please note that this is only possible when one of the following conditions is satisfied:
• the flag “Receive Direct Messages from anyone” is activated in Twitter (not recommended as this might result in a high volume of messages)
• the customer is a follower
• a previous conversation was already established in the past to receive help

Please note that the Twitter policies which allow to send unsolicited Direct Messages may change. This is outside Genesys control and the flow and / or preconditions to send Direct Messages may change.

User sends a DM to the company:

The user must be a follower of the company, so that the company can send a direct message back. Therefore, non-followers are sent a follow request, e.g. “Please follow @Genesys for us to assist you”. This allows the User to assist customers over Twitter privately.

The tweet is stored in Genesys Contact History as an outgoing twitter message and associated with the same contact.

Genesys Social Engagement sends the Twitter message to the customer.

The customer sees the tweet and responds by following the @Genesys Twitter account.

The company then has a different choice of actions to perform, also according to what other channels are available for the agent and customer. If no other channel is available, the agent can reply to the direct message with the intended information and the interaction is closed.

Scenario 3: Facebook - post on Company’s timeline (wall) or comment to post (Reply)

The customer uses his account to post a message on the company’s timeline (wall) or posts a reply to a post from the company’s timeline.

Genesys Social Engagement queries this page’s wall and finds the new post with comments. The query is run on a configurable timer.

Genesys Social Engagement captures the message and creates an interaction in Genesys. The interaction consists of an original post plus comments which are posted within the query’s timeframe. Additional attributes describing the post author's and commentators' profiles are also part of the interaction structure.

A customer contact will be created / updated for the initial author of the original post. Based on your business requirements you can decide whether you want to create a contact record for each author of a potential reply to the original post or only for the initial author (recommended).

The strategy stores the post including comments in Genesys contact history and associates it with the contact(s).

NOTE: while the interaction representing the initial post and comments is in the queue, further comments could be added. The query could pick up these additional comments and create another interaction. The agent receiving the first interaction will be notified of the remaining pending interactions.

The Incoming Facebook interaction will be delivered to an agent.

The agent processes the incoming Facebook message and sends a response if required. Also he/she may mark this interaction as “Done” and not take any further actions.
Genesys stores the message text of the outgoing Facebook interaction in Genesys Contact History for the same contact.

Please NOTE: The outbound Facebook message will be a child of the original message. (Reply)

Scenario 4: Facebook - private messaging

Facebook messenger can only be initiated by the end user.

The user needs to invite the company to a chat session via the “Message” button on the main Facebook page.

Genesys receives the chat request and distributes to an agent. The customer’s public Facebook info is passed with the chat request.

The agent is alerted of an incoming Chat session with a "toast" indicating the chat is with the Facebook customer.

The agent accepts the chat interaction and begins a chat conversation with the customer.

Genesys Social Engagement sends the reply back to the customer.

Keyword mapping

There are two entities taking care of actionability detection and keyword mapping:

- The cloud driver software
- The on-premise content analyzer

Cloud driver logic

The cloud driver can be configured to monitor either a specific account (=all interactions that are related to the account) or keywords (such as hashtags or specific words that are relevant to the social customer care task). Please be careful when specifying keywords as common words or hashtags may result in a large number of interactions that are both filtered and routed at the on-premise server, thus impacting the overall performance of the architecture. In addition to this, Twitter and Facebook have policies that might prevent or block the account from receiving all those interactions, or might throttle message processing, if they receive too many processing requests, resulting in lost messages or delays in sending or receiving messages.

Content analyzer / Knowledge Manager

You can use Genesys Content Analyzer to run a secondary analysis on the actionability of interactions that are brought into the system by the Cloud Driver Logic. Genesys supplies samples, which demonstrate these capabilities.

Knowledge Manager provides additional key-word spotting abilities.

Content Analyzer provides Natural Language Processing Capabilities.

You can use the sample training objects to produce new models, improving the quality by making adjustments such as:
• Altering the settings such as those for quality level.
• Using the Mail Editor to edit the content of the messages in the training object.
• Using the Mail Editor to add more sample messages to the training object.

Genesys also provides sample-screening rules for detecting sentiment and actionability.

Please see the latest product documentation for supported languages.

Please note: this channel type is a hybrid between chat and social. It is a chat session but can also receive offline messages and these can be delivered via Facebook (i.e. messages sent by the customer after the chat interaction with the agent has been finished). These will be handled as a new interaction. Sending offline messages from the agent desktop is currently: if the agent needs to send info via FB Messenger, the end user must initiate the conversation and re-open the chat session.

Distribution Logic

The following lists the minimum requirements for distributing a social message to agents:
• One skill is needed for distribution of all social interactions (no differentiation according to topic or Media). All agents with the corresponding skill are the target for distribution of interactions (no skill level).
• Blending with other media types is supported including configuration of capacity rules.

User Interface & Reporting?

Agent UI

The following lists the minimum requirements for the Social Engagement interfaces:
• The agent desktop will be enabled to handle Social Media Interactions (Facebook & Twitter) supporting Genesys standard functionality.
• 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.

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:

- Facebook Media Activity
- Twitter Media Activity

See Standard Report Templates for more information.

Historical Reporting

**Genesys CX Insights** (GCXI) provides customizable reports and dashboards that can help you track the benefits of this use case by enabling you to assess the day-to-day operations of the contact center resources for 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 include:

- **Agent Social Engagement Report** — Provides detailed information about average social media scores in each configured standard response or category, for each agent and day. Includes average agent social media scores for Sentiment, Influence, and Actionability. This report must be configured for your use, and can be customized to better suit your environment.

- **Interaction Handling Attempt Report** — Provides detailed information about handling times, agent participation, engage time, routing time and parameters, and the technical results (disposition) associated with customer interactions. Use this report to understand how the contact center is routing and handling interactions, and evaluate conversion success rates.

- Other reports in the Agents, Business Results, and Detail folders are useful to evaluate resource performance.

For more information, see *Genesys CX Insights 9.0 User's Guide*.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>
General Assumptions

- Implementation of this use case is based on the Digital Blueprint Architecture.
- Genesys Infomart and Interactive Insights is used for historical reporting.
- WDE is used as agent desktop (with social plug-in)
- Genesys Pulse is used for real-time reporting.
- Please note that public posts, comments and tweets can be edited or deleted by a user while an agent works on a resolution, which is not addressed or reflected in this use case

Customer Responsibilities

- GSE in configured to handle interactions from the company’s Facebook page and Twitter handle.

Related Documentation

Agent Desktop

Agent Desktop integrates social media channels into the Chat interaction interface to make handling Facebook messages, Tweets, and other social media as simple as chatting.

- Chat interactions
- Social engagement with Facebook
- Social engagement with Twitter
- Contact interaction management

Workspace Desktop Edition

Workspace integrates social media channels into the Chat interaction interface to make handling Facebook messages, Tweets, and other social media as simple as chatting.

- Chat interactions
- Social engagement with Facebook
- Social engagement with Twitter
- Contact interaction management
Genesys Social Media Routing (CE19) for Genesys Engage on premises

Document Version

- Version v 1.0.3 last updated July 12, 2021
Genesys Personalized Digital Routing (CE20) for Genesys Engage on premises

Apply personalized routing to digital interactions

What's the challenge?

Customers expect to be connected with the best available agent, and for the agent to know their history and status from all communication channels — email, messaging, and chat. But if your interaction channels operate in silos, your agents are operating at a disadvantage and customers get frustrated.

What's the solution?

Give customers hyper-personalized experiences by routing them to the best resource. Move beyond queue-based routing to improve customer satisfaction and reduce operational costs. Enable the best possible business outcome across every digital channel.

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 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 Workspace Desktop Edition
  • 7.3 Document Version
Use Case Overview

Story and Business Context

This use case is an open framework which allows to implement multiple scenarios in conjunction with other Smart use cases (most notably the use case Genesys Personalized Routing (CE02) for Genesys Engage on premises). Please see the document [[UseCases/Current/GenesysEngage-onpremises/CE05]] as one example.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Customer Experience</td>
<td>Improve NPS by addressing customers requests in a timely manner through skills based routing</td>
</tr>
<tr>
<td>Improved First Contact Resolution</td>
<td>Identify customers’ intent, identity, context and journey information and route to the right skilled agents through skills based routing to improve first contact resolution</td>
</tr>
<tr>
<td>Increased Revenue</td>
<td>Identify customers’ intent, identity, context and journey information and route revenue generating opportunities to best agent through skills based routing increase revenue</td>
</tr>
<tr>
<td>Reduced Handle Time</td>
<td>Identify customers’ intent, identity, context and journey information and route to the right skilled agents through skills based routing to reduce handle time</td>
</tr>
<tr>
<td>Reduced Interaction Transfers</td>
<td>Reduce inbound transfers by identifying customers’ intent, identity, context and journey information and routing to the right skilled agents through skills based routing</td>
</tr>
</tbody>
</table>

Summary

Identify customer intent and identity and use customer context data and journey information (cross-channel history) to route to agent with optimal capabilities to handle the customer's request. This use case is an enhancement of the following functional use cases, which provide details on handling of the respective channel.

- Genesys Email Routing (CE16) for Genesys Engage on premises
- Genesys Chat Routing (CE18) for Genesys Engage on premises
- Genesys SMS Routing (CE29) for Genesys Engage on premises

In addition to the functionality covered already by the use cases mentioned above, this use case will add the following capabilities by using customer context data and business rules:

- Personalized auto-acknowledge messages
• Personalized routing decisions

Use Case Definition

Business Flow

The following diagram describes the business flow of the interaction handling.
Business Flow Description

1. The customer contacts the company via e-mail, chat or SMS

2. Genesys verifies if the customer can be identified in context services (Reference: BL1)
   1. Identifying information is:
      1. E-mail address for e-mail and chat
      2. Phone number for SMS

3. If the identifying information does not match an entry in context services, a new contact will be created. Context from the interaction and customer journey will be attached to this contact. For chat: If the customer does not provide an e-mail address, he will be handled as anonymous customer and no contact / journey will be created.

4. The interaction is handled as described in the underlying use cases for chat, e-mail or SMS

5. If the customer could be identified in context services, Genesys will check if personalized treatment/handling of the customer interaction is required using the available information in the database and the configured business rules (Reference: BL2).

6. Genesys updates the contact with context information from the interaction and the customer Journey. The interaction is handled as described in the underlying use cases for chat, e-mail or SMS.

7. Genesys updates the contact with context information from the interaction and the customer Journey (Reference: BL3). Genesys will modify the following based on the configured business rules:
   - Automated reply message (personalized messaging)
   - Required skill / agent to handle the interaction
   - Interaction priority

8. The flow will continue as described in the underlying use cases for chat, e-mail or SMS with the modified parameters as described above.
Business and Distribution Logic

Business Logic

Parameters and Business Rules

BL1:
Genesys checks the personalized routing database to see if there is a unique match for the available customer Identifier. Customer identifier will vary based on the inbound interaction channel:

- E-mail address for e-mail and chat
- Phone number for SMS

BL2:
Genesys uses the available Customer Identifier to see if there is a matching record in the Context Services Database. Where there is a match, Genesys will also establish if personalized handling of the interaction is required. This decision is based on the available data for the customer entry and the configured business rules.

The following section describes the information that can be sent to / utilized by the Personalized Routing DB in order to influence the routing.

- Repeat Calls
- Abandoned Calls
- Pending Interactions (e.g. unanswered e-mail, SMS / Twitter, Facebook)
- Customer Segment (stored by Genesys)

BL3: Treatments Available by Use Case Level

This section covers the treatments that can be applied to an inbound interaction based on the available data outlined in BL2.

- High Priority Routing (next available agent)
- Route Customer to Specific Skill / Skill combination
- Personalized message, i.e.
  - Personalized auto-answer in case of e-mail and SMS
  - Personalized greeting message in case of chat

Distribution Logic

Please refer to the following use cases:

- Genesys Email Routing (CE16) for Genesys Engage on premises
- Genesys Chat Routing (CE18) for Genesys Engage on premises
User Interface & Reporting?

Agent UI

When calls are routed to an agent, the following additional requirements are available:

- Review *customer interaction history.*
- Correlate anonymous data with customer identification.
- When a call is distributed to an agent the following data is displayed:
  - Context Services Data
  - Short message which explains the context (to be set via business rules)

Reporting

Real-time Reporting

Real-time reporting requirements

1. Open sessions by type of interaction
   a. This report shows a summary of the continuity sessions by interaction type (Sales, Tech Support, Information, etc.)

2. Reactive continuity Sessions by state by interaction type
   a. This report shows a summary of the continuity sessions were customer contact the Company back.

3. Cross channel communication follow up
   a. In this report the Company will know the last rule apply and the next one

Note: Reports to include dimensions like:

<table>
<thead>
<tr>
<th>Session ID</th>
<th>Customer Name</th>
<th>Customer Segment</th>
<th>Session State</th>
<th>Session Age</th>
<th>Interaction Type</th>
<th>Last Channel of Contact</th>
<th>Next Channel of Contact</th>
<th>Lifespan</th>
</tr>
</thead>
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</table>
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 percentage of abandon interactions, and the root cause of abandonment.

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 **Chat** folder, such as:

- **Asynchronous Chat Dashboard** — View detailed information about asynchronous chat sessions in the contact center. Asynchronous (Async) chat sessions are single chat sessions between a customer and a contact center that last for a long period of time (potentially several days). Agents can return a chat session back into the workflow (into a dormant state), and then reconnect to the session later.

- **Chat Engagement Report** — Learn more about how chat calls that terminated.

- **Interaction Acceptance Dashboard** — Understand how long it takes for agents to accept customer interactions, and to identify what percentage of interactions are accepted promptly, or with some delay.

- **Interaction Acceptance Report** — View statistics about the acceptance of interactions by agents, including the amount of time it takes for agent to accept interactions, and the number and percentage of interactions that were accepted quickly, or with a delay.

Other reports relevant to this use case include:

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

For more information about Genesys CX Insights and other reports/dashboards, see the *Genesys CX Insights 9.0 User’s Guide*.

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**Customer-facing Considerations**

**Interdependencies**

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>None</td>
<td><strong>Digital</strong></td>
<td>None</td>
<td>None</td>
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<td></td>
<td>- Genesys Email Routing (CE16)</td>
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<td>All of the following required:</td>
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<tr>
<td></td>
<td>• Genesys Chat Routing (CE18)</td>
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<tr>
<td></td>
<td>• Genesys SMS Routing (CE29)</td>
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<td></td>
</tr>
</tbody>
</table>

General Assumptions

- Customer can provide web services interfaces for context services integration
- Customer can provide standard integration with CRM / BI systems.

Customer Responsibilities

N/A

Related Documentation

Agent Desktop

Agent Desktop enables agents to handle interactions routed to them.

- Agent Desktop v9

Workspace Desktop Edition

Workspace enables agents to handle interactions routed to them.

- Workspace Desktop Edition Help

Document Version

- Version v 1.0.4 last updated July 12, 2021
Genesys Digital Callback (CE22) for Genesys Engage on premises

Enable customers to request a callback from your website or app

What's the challenge?

When customers can’t find the answers they need on your website or app, they want to speak with someone who can help quickly. For online consumers, who are a click away from the competition — frustration over long hold times or ill-equipped agents — results in lost sales and lower customer experience scores.

What's the solution?

With just a single click, Genesys Callback provides your digital customers the option to request a return call instead of waiting on hold. And because callback routing uses skills-based routing, these requests can be intelligently routed to the individual best equipped to help.

Other offerings:
Genesys Engage cloud PureConnect

Contents

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  • 5.1 Agent UI
  • 5.2 Reporting

• 6 Customer-facing Considerations
  • 6.1 Interdependencies

• 7 Related Documentation
  • 7.1 Agent Desktop
  • 7.2 Workspace Desktop Edition
  • 7.3 Document Version
Use Case Overview

Story and Business Context

At times, customers browsing your website or mobile app realize they need assistance. You can create a seamless transition by offering a callback option, either immediate or scheduled, that gets the customer to the right agent based on their stated issue. The contact center agent is provided with the context of the request for a seamless customer experience.

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:

<table>
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<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Customer Experience</td>
<td>Lower customer effort and improved customer experience through a simple transition from self-service to assisted service.</td>
</tr>
<tr>
<td>Improved Employee Utilization</td>
<td>Level peaks with callback and better manage resource occupancy</td>
</tr>
<tr>
<td>Improved First Contact Resolution</td>
<td>Customer Context Data from website context or mobile geo location is used to route to agent with optimal capabilities to handle the customer’s request.</td>
</tr>
<tr>
<td>Increased Revenue</td>
<td>Improve online sales conversions by offering the option for a callback. Improve online sales conversions by offering the option for a callback. Enabling click-to-call option on your website or your app, we can increase online conversions with easy access to assisted service at the customer's preferred time.</td>
</tr>
<tr>
<td>Reduced Handle Time</td>
<td>Decrease handle time and queue time through a callback scheduled at the caller's convenience. Customer Context Data is also collected and passed to the agent, thus shortening interaction times due to agent knowing subject matter of request in advance.</td>
</tr>
</tbody>
</table>

Summary

A customer browses the company’s website or mobile application and requests a callback from the contact center for additional support. The customer provides their information, including the subject of their inquiry, and chooses either a callback as soon as possible or within a convenient timeframe. At the designated time, a call is placed to the customer and they are connected to an agent with the matching skill needed given the provided subject of the call.
Use Case Definition

Business Flow

1. The following flows describe the use case from the perspective of the main actors, such as a user or customer and a contact center agent, the first a request from a website, the second a request from a mobile application.
**Business Flow Description Website Flow**

1. The customer browses the company’s website and requires help.
2. The customer clicks the “callback” button/widget, powered by Genesys Widgets.
3. The website widget displays a brief registration page to the customer. Genesys provides a standardized widget for Callback.
4. The customer enters his name and phone number. Optionally, the name and phone number can be automatically set if the customer is authenticated within the website.
5. Using the information collected in the previous step, including the content of the page the user is visiting, Genesys determines the appropriate agent skill, then calculates agent availability. The customer may choose either:
   - Immediate Callback: In this case, the callback is immediately queued and then initiated once an agent with the required skill is available.
   - Scheduled Callback: In this case, the customer chooses from available time slots. Time slots can be configured in 15, 30, or 60 minute intervals. Capacity at each slot is configurable within the Callback user interface by the company’s administrator.
6. The customer chooses a callback option and the corresponding callback request is created within the Genesys system.
7. At the requested time (or immediately in the case of Immediate Callback), the callback is queued to be distributed to an agent with the right skill. By default, the skill target is specified on the Genesys Callback Service object configuration.
8. When an agent with the requested skill becomes available, the agent is reserved and an outbound call is initiated to the customer phone number.
   a. If the caller answers the call, an announcement is played to inform the customer that this is the callback he requested. A sample announcement could be: “This is your requested callback from company XYZ. Please press 1 to confirm that you requested this callback, and you will be connected to an agent.” The customer can
confirm the callback by pressing “1”, and he will be connected to the agent.

• b. If the customer does not answer or confirm the callback, another attempt occurs after 10 minutes (configurable). This includes the cases that the caller is busy, the call is connected to voicemail, the caller rejects the call, or other scenarios in which no agent is requested. The number of call attempts is configurable, but best practice is no more than three call attempts. If he still does not accept the call, the request is cancelled.

9. After the conversation between the agent and the customer, the agent can classify the call for reporting purposes via his agent desktop.

Business Flow

(2) Business Flow—Mobile App (available in Premise-only)
Business Flow Description Mobile Flow

1. The customer browses the company’s mobile application and requires help.
2. The customer clicks the “callback” button or link in the mobile app.
3. The app displays a brief registration page to the customer.
4. The customer enters his name and phone number. Options:
   - Name and phone number can be automatically set if the customer is authenticated within the app.
   - Depending on the implementation of the callback logic in the mobile app, the option to select a specific skill is based on the particular page from where the callback is requested.
5. Using Genesys APIs, the website widget retrieves the Expected Wait Time (EWT) for an immediate callback and available time slots for a scheduled callback for a specific service, and displays the options to the customer. (Note: The request from the app to Genesys must contain one of a set of predefined subjects which are used to determine the requested skill for an agent, the current EWT, and the available time slots.) The customer may choose either:
   - Immediate Callback: In this case, the callback is immediately queued and then initiated once an agent with the required skill is available.
   - Scheduled Callback: In this case, the customer chooses from available time slots. Time slots can be configured in 15, 30, or 60 minute intervals. Capacity at each slot is configurable within the Callback user interface by the company’s administrator.
6. The customer chooses a callback option and the corresponding callback request is created within the Genesys system.
7. At the requested time (or immediately in the case of Immediate Callback), the callback is queued to be distributed to an agent with the right skill. By default, the skill target is specified on the Genesys Callback Service object configuration.
8. When an agent with the requested skill becomes available, the agent is reserved and:

- a. For customers who opt in for push notifications, a push notification is sent to the customer indicating their callback is ready. If this is accepted, an outbound call is initiated. The customer may select to further delay the callback or cancel it entirely. This ability for the customer to accept, delay, or cancel can be configured within the app and push notification.

- b. For customers who do not opt for push notifications, an outbound call is initiated. For customers who do not answer or confirm the callback, another attempt occurs after 10 minutes (configurable). This includes the cases that the caller is busy, the call is connected to voice mail, the caller rejects the call, or other scenarios in which no agent is requested. The number of call attempts is configurable, but best practice is no more than three call attempts. If he still does not accept the call, the request is cancelled.

9. After the conversation between the agent and the customer, the agent can classify the call for reporting purposes via his agent desktop.

Business and Distribution Logic

Business Logic

The following parameters are configurable for callback:

- Potential time slots for scheduled callback:
  - Duration of the time slots for requesting a scheduled callback. Business hours are separated into time slots of 15, 30, or 60 minutes that users can request to be scheduled in.
  - Maximum number of connection requests per time slot. This number is valid for all time slots.
  - These time slots do not apply to immediate callback.

- Business hours for the service, including holidays and special days.

- Voice prompts for announcements.
  - While the Callback UI allows reference to audio files, unrelated to language, for purposes of this use case, one language is configured as the default language to be used if this information is not available.

- Assigning a priority to callback requests. This is important when this use case is used in combination with other inbound media types (such as inbound calls or email). All callback requests have the same priority.
Distribution Logic

The minimum functionality for distributing a callback generated from the web page to agents includes:

- Routing of callback requests to agent based on agents' skills. The required skill expression for a callback request is based on service definition, and can be configured at service level.
- Redirect On No Answer (RONA) functionality.
- Support for blending with other media types such as non-voice inbound interactions, including configuration of capacity rules.
- After configurable time-outs, expansion of the routing target based on skill expression.

User Interface & Reporting?

Agent UI

The Agent Desktop provides the following functionality to support Callbacks:

- Configuration of not-ready reason codes (Admin Work, Lunch, Meeting, Pause, RONA, and Training).
- Display of Subject, Customer ID, Customer First Name, Customer Last Name, Customer Phone Number, and Language.
- Disposition codes to classify call and call outcome for reporting purposes.

Reporting

Real-time Reporting

Minimum functionality:

- Information on Total Callbacks, Answered by customer or Abandoned, In queue, and Distributed to agent
- The information is available per Service.

Historical Reporting

Leverage standard out of the box Call Back reports in CX Insights.

Use Callback Summary Report for detailed information about callbacks that were processed by the contact center, allowing you to analyze callback performance based on nearly thirty metrics, including:

- Total number of accepted, declined, attempted, connected, cancelled, abandoned, and successful callbacks.
- Percentages of callbacks that were successful, unsuccessful, declined, or connected.
• Savings resulting from callbacks, including the total amount time and money saved and the average time and money saved per callback.
• The number of attempts made to complete callbacks, the time customers spent waiting for an agent, and time customers waited before abandoning a call.

Use **Callback Detail Report** for detailed information about callbacks that were processed by the contact center, allowing you to analyse callback performance based on nearly 30 metrics. Use this report to view a detailed picture of how Callback is used in your contact center, including information about the volume of callback calls, success rates, resulting savings, and customer wait times.

**Customer-facing Considerations**

**Interdependencies**

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>

**General Assumptions**

• Implementation of this use case is based on the Digital Blueprint Architecture.
• Call Progress Detection (CPD) is based on Genesys SIP & Media Server.
• Workspace Desktop Edition is used as the agent desktop (otherwise, Callback Preview mode and rescheduling of callback requests is not available).
• The company must provide a SIP trunk for connection to Genesys SIP Server. Genesys Callback requires that:
  • SIP Server performs call dialing, CPD, call queuing, music treatments, and distribution to agents.
  • Agent Extensions are defined on SIP Server.
• If the callback requests are to be blended with other interactions (such as inbound calls), routing of the interactions must be based on the Genesys Platform.

**Customer Responsibilities**

• The company is responsible for all aspects of the website or mobile app: for example, development of the website, mobile application logic, and the integration with Genesys. For a mobile application, Genesys provides a set of APIs and examples for the customer’s use.
• Pulse is used for real-time reporting.
• Genesys Infomart and Interactive Insights are used for historical reporting.
Genesys Digital Callback (CE22) for Genesys Engage on premises

- No integration with third-party systems.
- Real-time and historical report templates may require customization.

Related Documentation

Agent Desktop

Agent Desktop provides a fully functional interface that enables agents to handle Callback interactions.

- Agent Desktop v9
- Voice calls

Workspace Desktop Edition

Workspace provides a fully functional interface that enables agents to handle Callback interactions.

- Workspace Desktop Edition Help
- Voice calls

Document Version

- Version v 1.1.1 last updated July 12, 2021
Genesys Co-browse (CE27) for Genesys Engage on premises

Extend voice or chat interactions with co-browse

What's the challenge?

Your customer is frustrated because they're having trouble on your website. Your agent is frustrated because he can't see where the customer is struggling. The customer has to describe what's on the screen; the agent has to articulate where to click. It's cumbersome — and results in long handle times.

What's the solution?

Improve first contact resolution by letting agents "show and tell" with your customers through a co-browsing session, using real-time annotations, comments, or even the ability to take control of the customer's screen. There's zero footprint for customer ease and content masking for peace of mind.

Other offerings:

Genesys Cloud Genesys Engage cloud

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 and Distribution Logic
- 5 User Interface & Reporting
Genesys Co-browse (CE27) for Genesys Engage on premises

- 5.1 Agent UI
- 5.2 Reporting

- 6 Customer-facing Considerations
  - 6.1 Interdependencies
  - 6.2 Document Version
Use Case Overview

Story and Business Context
A customer and a contact center agent are having a conversation over the phone or through a web chat session. During the conversation, the ability to see and control the customer’s browser through co-browsing functionality enables the agent to convey information more effectively and get the customer’s issue resolved more quickly.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Customer Experience</td>
<td>Mitigate customer frustration by providing a better method to serve and assist customers thereby reducing customer effort</td>
</tr>
<tr>
<td>Improved First Contact Resolution</td>
<td>Optimize the customer service experience by initiating a co-browse session with the customer to resolve their request the first time</td>
</tr>
<tr>
<td>Increased Revenue</td>
<td>Reduce shopping cart abandonment and increase online conversion rates</td>
</tr>
<tr>
<td>Reduced Handle Time</td>
<td>Leverage annotations, comments and browser control to aid quick resolution.</td>
</tr>
</tbody>
</table>

Summary
During a call or a chat session between a customer and an agent, the customer can initiate a co-browse session with the agent, so both the agent and the customer share the same instance of the browser. This enables the agent to provide direct support to a customer trying to complete a request on the company's website.

Use Case Definition

Business Flow
The following flow describes the use case from the perspective of the customer and the contact center agent.
Business Flow Description

1. The customer and agent are connected via a chat session or a voice call.

2. The agent may propose to the customer to start a co-browse session to support him/her on the website. For security reasons, only the customer can initiate the co-browse session.
   - **Call only**: A session ID is displayed to the customer if he/she clicks the co-browse link in the Assistance/Channel Selector Widget. This session ID is needed to join the agent desktop with the correct browser session. The customer gives this session ID to the agent over the phone. The agent enters the session ID into the agent desktop to start the co-browse session.
   - **Chat only**: The customer clicks the three-dots icon on the chat widget and selects “Start Co-browse”.

3. When the session is established, the agent’s desktop displays a view of the website in the browser window the customer is using. Agents start co-browse sessions in Pointer Mode. In Pointer Mode, the customer and the agent can see each other’s mouse pointer but the agent cannot enter any information into the web page, click buttons, or navigate the customer’s browser.

4. If the agent needs to enter information into the web page or to navigate the browser, he/she can send the customer a request to switch the co-browse session to Write Mode.

5. Once the customer accepts this request, the agent can navigate, fill forms, and click hyperlinks on the web page. Sensitive Data can be masked before presenting to the agent, and agent controls (the ability to fill certain fields or submit forms) can be blocked through instrumentation. The customer can revoke the Write Mode at any time, returning the agent to Pointer Mode.

6. The co-browse session ends when any of the following events occurs:
   - The customer chooses to end the co-browse session
   - The agent chooses to end the co-browse session
• The primary chat or voice interaction is transferred or ended by either the customer or the agent
• Due to inactivity after a preconfigured time-out expires

The primary voice or chat interaction can continue even when co-browse has ended.

Business and Distribution Logic

Business Logic

Starting a co-browse session without primary interaction: Co-browse sessions take place on top of a primary interaction (in this case, chat or voice). If the customer initiates a co-browse without any primary media, the instrumentation prompts the customer to initiate a conversation via voice or chat before initiating the co-browse.

Distribution Logic

N/A

User Interface & Reporting?

Agent UI

The agent interface related to co-browse must:

• Enter the session ID when co-browse needs to be started from a voice call
• Automatically start a co-browse session if the session has been initiated by the customer through their chat widget
• Display the customer page view when co-browse is engaged

Transfer, Conference, and Supervision of co-browse sessions are not supported.

Reporting

Real-time Reporting

Real-time Reporting is provided through Genesys Pulse.

Minimum requirements:

• Implementation of standard templates in Pulse: eServices Queue KPI, eServices Agent Activity

Current Co-browse Agents
Chat Agents: Number of agents working on chat
Chat with Co-browse: Number of agents working on chat with co-browse
Inbound Voice: Number of agents working on inbound voice
Inbound Voice with Co-browse: Number of agents working on inbound voice with co-browse

Current Chat Interactions with Co-browse
- Chat: Number of chat interactions currently handled by agents
- Co-browse in Chat: Number of chat with co-browse interactions currently handled by agents
- (Co-browse in Chat)/Chat, %: Ratio of current number of chat with co-browse interactions to the total number of chat interactions
- Web Chat: Number of web chat interactions currently handled by agents

Co-browse in Web Chat: Number of web chat with co-browse interactions currently handled by agents
- (Co-browse in Web Chat)/Web Chat, %: Ratio of current number of web chat with co-browse interactions to the total number of web chat interactions

Current Voice Interactions with Co-browse
- Inbound Voice: Number of inbound voice interactions currently handled by agents
- Co-browse in Inbound Voice: Number of inbound voice with co-browse interactions currently handled by agents
- (Co-browse on Inbound Voice)/Inbound Voice, %: Ratio of current inbound voice with co-browse interactions to the total number of inbound voice interactions

Co-browse Session Details
- Current Agent State: Auxiliary statistic needed for user data retrieval
- Co-browse Session State: Alive or finished
- Co-browse Session Start Time: Session start time
- Co-browse Session ID: Session ID
- Co-browse Session Quantity: Session quantity

Historical Reporting

Genesys CX Insights (GCXI) provides customizable reports and dashboards that can help you track the benefits of this use case. You can easily filter the values in reports to show only chat, inbound voice, or both.

The most relevant reports include:
- Co-browse Detail Report — Provides detailed information about Co-browse sessions, on an agent-by-agent bases, including Interaction durations, Co-browse session durations, Co-browse modes, and details about the pages visited.
- Co-browse Summary Report — Provides a summary view of Co-browse session volumes, by agent, including interaction volumes, the number and percentage of interactions that included Co-browse sessions, handle times, and other key metrics.
Other reports relevant to this use case are found in the Agents, Chat, Co-browse folders.

For information about filtering report data, see Understanding and using reports.

For more information about Genesys CX Insights, see Genesys CX Insights 9.0 User’s Guide.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
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<tr>
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<td></td>
<td>Genesys Chat Routing (CE18)</td>
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<td></td>
<td>Genesys Digital Callback (CE22)</td>
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<tr>
<td>Inbound</td>
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<tr>
<td></td>
<td>Genesys Call Routing (CE01)</td>
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<tr>
<td></td>
<td>Genesys Personalized Routing (CE02)</td>
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<td></td>
</tr>
<tr>
<td></td>
<td>Genesys Click-to-Call (CE21)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

General Assumptions

- Workspace Desktop Edition is the agent desktop.
- Pulse is used for real-time reporting.
- Use of Genesys Widgets with limited modification to the company’s corporate identity as described above, under “Widget Functionality”. Alternatively, use of custom chat widget which is not part of Genesys deliverable.
- No integration with third-party systems.
Customer Responsibilities

• The Genesys customer is responsible for integration of the solution into the company website.

• The Genesys customer is responsible for tagging information and fields on their website that need to be hidden from the agent during a co-browse session, or agent controls that need to be blocked (such as a Submit form).

Document Version

• Version v 1.1.4 last updated July 12, 2021
Genesys SMS Routing (CE29) for Genesys Engage on premises

Route SMS interactions to the best resource

What's the challenge?

Your customer wants to contact you in the same way they would friends and family — instantly, conveniently, and personally, with freedom to keep moving. If they encounter constraints, excessive hold times, inconsistent responses or multiple calls, that can damage customer satisfaction and put a strain on your agents.

What's the solution?

Connect a customer to the right resource anywhere in your business by routing customer text messages to your best-fit agents. Genesys SMS Routing uses skill-based routing so messaging your company for support is faster and more efficient than calling and enables conversations from anywhere.

Link to video

Other offerings:


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 and Distribution Logic
• 4.3 Distribution Flow
• 5 User Interface & Reporting?
  • 5.1 Agent UI
  • 5.2 Reporting
• 6 Customer-facing Considerations
  • 6.1 Interdependencies
• 7 Related Documentation
  • 7.1 Document Version
Use Case Overview

Story and Business Context

This functional use case has been created to enable companies to use Genesys Solutions to streamline the queue management and distribution process of customer-generated SMS messages to the handling agents. Genesys can improve agent productivity, increase adherence to SLAs, and deliver improved management tools. It is based on experience and best practices and contains the minimal functionality to enable our customers:

- To go live quickly (Time to market).
- To use best practice scenarios to enable fast realization of benefits.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Employee Utilization</td>
<td>Combine text messaging with automated responses to boost agent productivity.</td>
</tr>
<tr>
<td>Reduced Handle Time</td>
<td>Routing text messages to the best-fit agent assures the right skills for faster resolution.</td>
</tr>
<tr>
<td>Reduced Transfers</td>
<td>SMS interactions captured by the Genesys system go through content analysis to assign a category that allows the best agent with the skills to the corresponding category. The result is correct transfer of SMS and avoidance of misrouted SMS and unnecessary costs.</td>
</tr>
</tbody>
</table>

Summary

A customer sends an SMS to a company. The SMS is captured by the Genesys system and a content analysis is performed to assign a category to the SMS. It is then queued to the best available agent with the skill set corresponding to the category. After the agent has compiled the SMS answer, a supervisor may review the SMS depending on the agent. Priority tuning improved the SLA adherence to customers' SMS messages. The use case provides reporting capabilities to provide management visibility into the SMS interaction channel.
Use Case Definition

Business Flow

The following flow describes the use case from the perspective of the main actors, i.e. user and contact center agent.

The following diagrams show the business flow of the use case:
Business Flow Description

1. A customer sends an SMS to a company phone number. The SMS message is captured from a Company SMS center to be handled by agents.

2. Genesys is integrated to the SMS center via an SMS Gateway and will receive the messages.

3. The new SMS is captured by Genesys including the customer's phone number as meta-data.

4. Genesys verifies if the corresponding user already exists as a contact within the Genesys Universal Contact History (by phone number). If the contact does not exist yet, Genesys creates the contact. The SMS message text as well as any answer by the agent is attached to the contact.

5. The system will verify if the customer's phone number is on the blacklist (see chapter "Blacklist"). SMS from blacklisted phone numbers will not be distributed to agents. Genesys analyzes the content to classify the SMS (see section "SMS message Categorization").

6. The system sends out a receipt acknowledgement SMS to the customer with a predefined template.

7. Once an agent with the requested skill is available, the SMS is routed to the agent's workspace application with screen pop showing information on the SMS category. Any available contact information from the Genesys Contact History (e.g. customer name) and previous contact history is also displayed.

8. Once the agent reads the SMS, he or she needs to decide if a reply is needed.
   - If no reply is needed, the agent marks the interaction as done.
   - If a reply is needed, the Agent creates an outbound reply SMS, potentially using a standard response template.

9. The agent sets 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 a number of process steps driven by configuration parameters and additional business logic within the system. These parameters and the underlying logic are described in this chapter.

Blacklist

It will be possible to configure and manage a blacklist of phone numbers for distributing SMS messages. An administrator can add / delete phone numbers from this blacklist. SMS messages coming from an address on the blacklist will not be distributed to agents.

SMS message Categorization

There are two methods of categorizing an SMS: Advanced Content Analysis and Keyword Matching. This is a system wide setting and only one method will be used at any given time.

Advanced Content Analysis (optional)

Incoming SMS message text is analyzed using natural-language processing (please see the comments on supported languages below). The result of analysis is an assignment to one or more categories of the category structure.

Content Analyzer creates its analysis algorithms by training: that is, by working its way through a number of SMSs that are classified according to the category system.

Training operates on a training object, which is a category tree and a group of messages classified using that category tree. A training object combines a category tree and a set of text objects, with each text object assigned to one category in the tree (categorized). The text objects are typically messages, but you may choose to have the set of text objects also include the standard responses associated with the category tree.

Training scans the text objects and forms a statistical model of the words and phrases that tend to occur in each category.

There are five possible sources of categorized text objects:

- SMS messages that have been assigned to categories
- Text objects that are created in Knowledge Manager
- Responses that are used when creating standard responses
- Objects that are used when creating other training objects
- Messages that are categorized when adding uncategorized SMS using the Training Object Data Analyzer

The result of training is a model. This classification model - a statistical representation of a category tree - analyzes an incoming SMS and produces a list of the categories that the interaction is most likely to belong to. Each likely category is assigned a percentage rating indicating the probability that the interaction belongs to this category.
An SMS will be assigned to the category with the highest percentage of probability if this percentage is above a configurable threshold. Otherwise it will be categorized with a default category.

**Keyword Categorization**

As an alternative to advanced content analysis, it is possible to replace this functionality with more straightforward keyword matching categorization.

Keyword matching allows the system administrator to configure a number of screening rules to identify SMS belonging to different categories. E.g. an SMS message that contains the word “order” would be categorized as a sales SMS. Screening rules can be configured to look for regular expressions that look for different words or phrase patterns that help categorize SMS messages.

Additionally, screening rules can be used to detect patterns like customer ID, and account number to either display or mask sensitive information to the agent. Configuration of up to three regular expressions to display to the agent / mask information are within the scope of this use case.

**Distribution Logic**

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 target
- Supervisor skill / skill level for the first, second, third and fourth target
- Overflow timeouts for overflowing from last agent routing to skill-based routing and from overflowing between targets. These timeouts are based on age of interaction.
- Priority tuning parameters
  - Priority increment (the amount to increase the priority after the interval time)
  - Priority interval (the time between priority increases)
  - Priority limit (the maximum priority)
  - Priority start (the starting priority)

The following parameter is configurable by the company phone number the SMS is sent to:

- Auto-acknowledge message

**Standard responses**

The workspace displays suggested responses to the agent based on the category. Genesys will prepare the possibility to associate a specific category with suggested responses using examples. The standard responses will need to be provided by the customer.

**Distribution Flow**

The following flow describes the logic for the distribution of SMS messages to the best available agent.
Distribution Flow Description

1. The system waits for the best fit agent defined by the skill and skill level for the requested subject until a specified timeout is reached. The required skill and skill level is defined per category.

2. The potential pool of agents is expanded via reducing the requested minimum skill level. The system will wait for an agent until a second timeout is reached.

3. The potential pool of agents is expanded via reducing the requested minimum skill level. The system will wait for an agent until a third timeout is reached.

4. The potential pool of agents is expanded a last time via reducing the requested minimum skill level.
Distribution Logic

Additional Distribution functionality.

The following lists additional functionality for the distribution logic:

- Re-route on no answer (RONA) - functionality: If an agent does not accept the SMS interaction, the SMS interaction is automatically put back into the distribution flow after a time-out. The agent is set to not-ready. The priority of the SMS can be increased by a configurable parameter.

- Blending with other media types is possible.

- Priority tuning can be configured via the following parameters:
  - Priority increment (the amount to increase the priority after the interval time)
  - Priority interval (the time between priority increases)
  - Priority limit (the maximum priority)
  - Priority start (the starting priority)

- Transfers are possible to another category, i.e. to agents satisfying the skills of another category. In case of transfer, the priority is increased to a configurable parameter.

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
- Transfer to third party outside Genesys.
- Collaboration function (forward to external party)
- Review functionality for supervisors
- Interaction Queue Management for supervisors
Reporting

Real-time Reporting

**Pulse** is a Genesys Administrator Extension (GAX) plug-in application that offers personalized dashboards based on specific functional, geographical or organizational needs. Pulse dashboards present information using graphical “widgets” that can be viewed as graphs or tables, showing information about specific key performance indicators, such as service level, chat interaction handled and the average handle time.

With Pulse you can:

- Monitor the current state and activity of Contact Center objects to help make decisions 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.
- Filter KPIs by Business Attributes such as the Category.
- Predefined templates
  - Monitor operational SMS activity through the eServices Queue KPIs templates.
  - Monitor Agent resource activity through the eServices Agent KPIs templates.

The sample SMS dashboard below demonstrates usage of the eServices Agent Activity and the eServices Queue Activity.

![Sample SMS Dashboard](image)

Historical Reporting

CX Insights out-of-the-box reports will be used to:

- Assess the day-to-day operations of the contact center resources for the routing and handling of interactions.
- Dimension the out-of-the-box aggregate based GCXI reports with Routing Parameters including the Category and the Disposition codes.
• Measure First Response Threshold (Customer Service Level) using the Interaction Volume Customer Segment Report.
• Evaluate resource performance with a variety of reports for Agents and Detail facts

There are 40+ reports available, potential reports to confirm the benefits for this use case are being met are as follows.

Queue KPI enable the organization to measure and filter Info Mart data based on the queue(s) through which customer interactions pass. Counts and duration measures are attributed to the reporting interval in which interactions entered the queue or work-bin.

<table>
<thead>
<tr>
<th>Queue KPIs</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Examples for available KPIs:</td>
<td>Queue interaction level data.</td>
</tr>
<tr>
<td>• Period</td>
<td>Counts and duration measures are attributed to the reporting interval in</td>
</tr>
<tr>
<td>• Queue Name</td>
<td>which interactions are offered to the queue or work-bin.</td>
</tr>
<tr>
<td>• Media Type</td>
<td></td>
</tr>
<tr>
<td>• Customer Segment</td>
<td></td>
</tr>
<tr>
<td>• Service Type</td>
<td></td>
</tr>
<tr>
<td>• Service Subtype</td>
<td></td>
</tr>
<tr>
<td>• Entered</td>
<td></td>
</tr>
<tr>
<td>• Redirected</td>
<td></td>
</tr>
<tr>
<td>• Not Accepted</td>
<td></td>
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<tr>
<td>• Accepted Agent</td>
<td></td>
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<tr>
<td>• Accepted Agent In Threshold</td>
<td></td>
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<tr>
<td>• Accept Time Agent</td>
<td></td>
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<tr>
<td>• % Service Level</td>
<td></td>
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<tr>
<td>• Invite Time</td>
<td></td>
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<tr>
<td>• Engage Time</td>
<td></td>
</tr>
<tr>
<td>• Handle Time</td>
<td></td>
</tr>
<tr>
<td>• Transfer Initiated Agent</td>
<td></td>
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<tr>
<td>• ....</td>
<td></td>
</tr>
</tbody>
</table>

Business Attribute enable the organization to measure and filter Info Mart data based on the business attributes that are associated with the customer interactions. Counts and duration measures are attributed to the reporting interval in which interactions entered the Contact Center.
### Business Attributes

<table>
<thead>
<tr>
<th>Available KPIs</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Period</td>
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</tr>
<tr>
<td>• Media Type</td>
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</tr>
<tr>
<td>• Customer Segment</td>
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<tr>
<td>• Service Type</td>
<td></td>
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<tr>
<td>• Service Subtype</td>
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<tr>
<td>• Entered Obj</td>
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<tr>
<td>• Abandoned Waiting</td>
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<td>• Not Accepted</td>
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<td>• Redirected</td>
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<td>• Accepted in Threshold</td>
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<td>• Accept Time Agent</td>
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</tr>
<tr>
<td>• % Service Level</td>
<td></td>
</tr>
<tr>
<td>• Engage Time</td>
<td></td>
</tr>
<tr>
<td>• Avg Engage Time</td>
<td></td>
</tr>
<tr>
<td>• Handle Time</td>
<td></td>
</tr>
<tr>
<td>• Avg Handle Time</td>
<td></td>
</tr>
<tr>
<td>• Transfer Initiated Agent</td>
<td></td>
</tr>
<tr>
<td>• ...</td>
<td></td>
</tr>
</tbody>
</table>

Business Attribute interaction level data. Counts and duration measures are attributed to the reporting interval in which interactions entered the queue.

### Accepted Agent

**Accepted Agent** enable the organization to measure and filter Info Mart data based on the queues or work-bins through which customer interactions pass in which agents accept or pull the interaction. Counts and duration measures are attributed to the reporting interval in which interactions entered the queue.

<table>
<thead>
<tr>
<th>Accepted Agent KPIs</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available KPIs:</td>
<td></td>
</tr>
<tr>
<td>• Queue Name</td>
<td>Service quality data for interactions in Queue.</td>
</tr>
<tr>
<td>• Media Type</td>
<td>Gauges service quality by indicating how many interactions were accepted as well as the percentage of interactions that were accepted within a specific set of time ranges. The time ranges are configured within the InfoMart Application options.</td>
</tr>
<tr>
<td>• Customer Segment</td>
<td></td>
</tr>
<tr>
<td>• Service Type</td>
<td></td>
</tr>
<tr>
<td>• Service Subtype</td>
<td></td>
</tr>
<tr>
<td>Accepted Agent KPIs</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>• Accepted Waiting 1..20 Thresholds</td>
<td></td>
</tr>
<tr>
<td>• % Accepted Waiting 1..20 Thresholds</td>
<td></td>
</tr>
</tbody>
</table>

**Agent Activity** enable the organization to measure and filter Info Mart data based on the interaction-related activities that are conducted by active agents.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Examples for available KPIs:</td>
<td></td>
</tr>
<tr>
<td>• Accepted</td>
<td></td>
</tr>
<tr>
<td>• Conference Initiated</td>
<td></td>
</tr>
<tr>
<td>• Consult Initiated</td>
<td></td>
</tr>
<tr>
<td>• Engage Time</td>
<td></td>
</tr>
<tr>
<td>• Handle Time</td>
<td></td>
</tr>
<tr>
<td>• Hold</td>
<td></td>
</tr>
<tr>
<td>• Invite</td>
<td></td>
</tr>
<tr>
<td>• Offered</td>
<td></td>
</tr>
<tr>
<td>• Rejected</td>
<td></td>
</tr>
<tr>
<td>• Wrap</td>
<td></td>
</tr>
<tr>
<td>• ...</td>
<td></td>
</tr>
</tbody>
</table>

Agent interaction level data.
Counts and duration measures are attributed to the reporting interval in which interactions are offered to the agent.

<table>
<thead>
<tr>
<th>Interaction State &amp; Reason</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Examples for available KPIs:</td>
<td></td>
</tr>
<tr>
<td>• % Engage Time</td>
<td></td>
</tr>
<tr>
<td>• % Hold Time</td>
<td></td>
</tr>
<tr>
<td>• % Invite Time</td>
<td></td>
</tr>
<tr>
<td>• % Wrap In Time</td>
<td></td>
</tr>
<tr>
<td>• Accepted</td>
<td></td>
</tr>
<tr>
<td>• Consult Received Accepted</td>
<td></td>
</tr>
<tr>
<td>• Engage Time</td>
<td></td>
</tr>
<tr>
<td>• Not Accepted</td>
<td></td>
</tr>
<tr>
<td>• Not Ready In Time</td>
<td></td>
</tr>
<tr>
<td>• Offered</td>
<td></td>
</tr>
<tr>
<td>• ....</td>
<td></td>
</tr>
</tbody>
</table>

Agent interaction and State level data.
Measures are attributed to each reporting interval in which agents handle the interactions and durations are clipped at interval boundaries.
### Agent Activity

#### Summarized

<table>
<thead>
<tr>
<th>State &amp; Reason</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Examples for available KPIs:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• % Busy Time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• % Not Ready Reason Time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• % Occupancy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• % Ready Time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• % Wrap Time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Active Time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Not Ready</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Not Ready Reason Time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Wrap</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• ...</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent summarized data for a session.</td>
<td></td>
</tr>
<tr>
<td>Measures are attributed to each reporting interval in which agents handle the calls, and durations are clipped at interval boundaries.</td>
<td></td>
</tr>
</tbody>
</table>

---

### Interaction Details

**Interaction Details** enable the organization to track low-level interaction details.

<table>
<thead>
<tr>
<th>Interaction Detail KPIs</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available KPIs:</td>
<td></td>
</tr>
<tr>
<td>• Interaction ID</td>
<td></td>
</tr>
<tr>
<td>• Connection ID</td>
<td></td>
</tr>
<tr>
<td>• Media Type</td>
<td></td>
</tr>
<tr>
<td>• Customer ID</td>
<td></td>
</tr>
<tr>
<td>• Customer Segment</td>
<td></td>
</tr>
<tr>
<td>• Service Type</td>
<td></td>
</tr>
<tr>
<td>• Service Subtype</td>
<td></td>
</tr>
<tr>
<td>• Business Result</td>
<td></td>
</tr>
<tr>
<td>• Interaction Type</td>
<td></td>
</tr>
<tr>
<td>• Start Timestamp</td>
<td></td>
</tr>
<tr>
<td>• End Timestamp</td>
<td></td>
</tr>
<tr>
<td>• Routing Target</td>
<td></td>
</tr>
<tr>
<td>• Resource Role</td>
<td></td>
</tr>
<tr>
<td>• Role Reason</td>
<td></td>
</tr>
<tr>
<td>• Technical Result</td>
<td></td>
</tr>
<tr>
<td>• Result Reason</td>
<td></td>
</tr>
</tbody>
</table>

<p>| Handling Attempt details of interactions that are stored mostly in the INTERACTIONRESOURCE_FACT Info Mart tables. | |
| Handling Attempt detail interaction level data. | |</p>
<table>
<thead>
<tr>
<th>Interaction Detail KPIs</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Queue Time</td>
<td></td>
</tr>
<tr>
<td>• Route Point Time</td>
<td></td>
</tr>
<tr>
<td>• Total Duration</td>
<td></td>
</tr>
<tr>
<td>• Customer Talk Time</td>
<td></td>
</tr>
<tr>
<td>• Customer Hold Time</td>
<td></td>
</tr>
<tr>
<td>• Customer Wrap Time</td>
<td></td>
</tr>
<tr>
<td>• ....</td>
<td></td>
</tr>
</tbody>
</table>

**Flow**

Available KPIs:

• Agent/Queue
• Connection ID
• Media Type
• Customer ID
• Interaction ID
• Interaction Type
• Interaction Subtype
• Segment ID
• Source
• Target
• Technical Result Resource Role
• Technical Result Role Reason
• Technical Result
• Technical Result Reason
• Duration

Flow detail interaction level data.

Interaction-flow details of interactions that are stored mostly in the INTERACTION_FACT, INTERACTION_RESOURCE_FACT, and MEDIATION_SEGMENT_FACT Info Mart tables.

**Transfer**

Available KPIs:

• Interaction ID
• Media Type
• Source
• Source Service Type
• Source Service Subtype
• Source Customer Segment

Transfer detail interaction level data.

Interaction details identifying the source and destination of transferred and conference interactions.
### Interaction Detail KPIs

<table>
<thead>
<tr>
<th>Source Last Queue</th>
<th>Source Technical Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source Customer Engage Time</td>
<td></td>
</tr>
<tr>
<td>Source Customer Hold Time</td>
<td></td>
</tr>
<tr>
<td>Source Customer Wrap Time</td>
<td></td>
</tr>
<tr>
<td>Source Queue Time</td>
<td>Target</td>
</tr>
<tr>
<td>Target Service Type</td>
<td>Target Service Subtype</td>
</tr>
<tr>
<td>Target Customer Segment</td>
<td></td>
</tr>
<tr>
<td>Target Last Queue</td>
<td>Target Technical Result</td>
</tr>
<tr>
<td>Target Customer Engage Time</td>
<td></td>
</tr>
<tr>
<td>Target Customer Hold Time</td>
<td></td>
</tr>
<tr>
<td>Target Customer Wrap Time</td>
<td></td>
</tr>
<tr>
<td>Target Queue Time</td>
<td>....</td>
</tr>
</tbody>
</table>

### Customer-facing Considerations

#### Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>

#### General Assumptions

- Implementation of this use case will be based on the Digital Blueprint Architecture.
Genesys Infomart and Interactive Insights in place for historical reporting.

- Genesys standard agent desktops will be used as agent desktop (WDE or WWE).
- Pulse will be used for real-time reporting.
- Integration with one corporate SMS center.
- Advanced Content Analysis is an optional extension to Keyword Categorization. This option requires additional licenses and services effort.
- Blacklist: It is assumed that the Blacklist functionality is used for short-term manual handling of emergency cases. It is not intended for long-term or broader spam filtering functionality.

Customer Responsibilities

- Requirements for integration with SMS Center
  - Check local requirements for character set, against SMS Server’s supported list (Deployment Guide and Release Notes)
  - Best practice recommends to avoid message splitting. The max size of the SMS messages is 160 characters in the U.S., check on SMS Center restrictions
  - If there is some issue with SMS Center, CC operations manually stops all SMS campaigns
- Customer has secured and provisioned a dedicated short code, long code, or text-enabled toll-free number in order to send SMS messages
- If Content Analyzer is used for SMS categorization:
  - The training model uses a Lexical Analyzer to convert text input from the SMS to an array of words or stems. Language specific Lexical Analyzers are available in the following languages: English, Portuguese, Turkish, Italian, Spanish, German and Japanese (requires the Japanese edition of Content Analyzer). For other languages, a default Lexical Analyzer can be used, but this will require more training for reliable categorization. The creation of a custom lexical model is not part of the delivery scope.
  - Text input needs to be available in UTF-8.
  - Customer to provide pre-categorized sample SMS messages to train the Content Analyzer language model.

Related Documentation

Document Version

- Version 1.0.5 last updated July 12, 2021
Genesys Messaging (CE34) for Genesys Engage on premises

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 cloud

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 Workspace Desktop Edition
  • 7.3 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.

Facebook Messenger, Apple Business Chat beta, and WhatsApp beta enable two-way conversations between consumers and businesses on familiar mobile devices and provide 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 Messaging conversations in their Genesys contact center environment. Businesses must sign up with Apple or WhatsApp, choose Genesys as their customer service platform provider, and get their use cases approved by Apple or WhatsApp to be part of the ecosystem. There is no approval required for Facebook Messenger.

To increase successful self-service interactions, a chatbot can be used over these messaging channels to automate the conversation with the customer, providing the ability to seamlessly transfer to a contact center agent if and when needed. See use case Genesys Chatbots (CE31) for Genesys Engage on premises for details and limitations of incorporating chatbots with Genesys Messaging offerings. When companies enable Facebook Messenger, Apple Business Chat and 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
- Increased revenue and ease of purchase by leveraging Apple Pay (Apple Business Chat only)
- Improved brand perception by offering new channels that are expected to be heavily promoted by Apple and 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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Customer Experience</td>
<td>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.</td>
</tr>
<tr>
<td>Improved First Contact Resolution</td>
<td>Match every consumer with the agent best equipped to respond through skills-based routing while reducing handle time</td>
</tr>
<tr>
<td>Increased Revenue</td>
<td>Increase sales and ease of purchase by leveraging Apple Pay (Apple Business Chat only)</td>
</tr>
<tr>
<td>Reduced Administration Costs</td>
<td>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</td>
</tr>
</tbody>
</table>

Summary

A consumer can initiate a conversation with a business directly in Apple's Messages application, Facebook Messenger, or in WhatsApp. They do so by clicking on the chat message icon that appears when searching for a business on their iOS device using Safari, Apple Maps, Spotlight, Siri or a custom button for Apple Business Chat, by being presented with a button to connect to WhatsApp, or by searching for the business's Facebook page to initiate a chat conversation. 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 Facebook Messenger Rich Messaging, Apple Business Chat list pickers, date pickers, URL previews, custom messaging extensions or WhatsApp Highly Structured Messages 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

- If the brand was pre-approved by WhatsApp, they can engage with us to get on-boarded to Genesys. We can help with pre-approvals, but a brand should not assume they are pre-approved, because they expressed interest with us, or purchased Genesys Messaging for WhatsApp from us.
  * The company purchases Genesys Messaging for WhatsApp (including Hosting Fees and Incidental sellable item) 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 company can go live with Genesys Messaging for WhatsApp. While in beta, WhatsApp may want to check out the company’s implementation before allowing them to go live.

- For Facebook Messenger there is no specific approval required. The steps for purchasing and going live with Facebook Messenger are the same as for WhatsApp.
Business Flow

Messaging Flow
Business Flow Description

1. Apple Business Chat: Company invites the customer to initiate a conversation via messaging e.g via a custom Click to Action button in their app, on their website, or in an email. Facebook Messenger: the customer can initiate a Messenger Conversation through the official Facebook Page of the company.

2. Apple Business Chat: The customer clicks the chat message icon, and sends an initial message to begin the conversation. Facebook Messenger: The customer clicks on the "Send Message" icon on the Facebook official page.

3. The Genesys system checks to see if it can recognize the customer.

4. For brand new interactions, Apple passes an opaque customer ID to protect the customer’s privacy until they are ready to share more information with the company. WhatsApp passes the phone number of the customer to help identify who initiated the conversation. Facebook passes a new PageScoped ID which is unique for a user, for a 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. For WhatsApp, Highly Structured Message templates (HSMs) can be sent to the customer (see below). For Facebook Messenger, Rich Media elements include Generic, Carousel, Media, and Button. For Apple Business Chat, additional rich media elements can be used by the agent:
   - List Picker - to select one or more options from a list
   - Date Picker - to make an appointment
   - Apple Pay - to complete a transaction
• Deep Linking into company app for customer authentication purposes, invoking other capabilities already within the app, or for other reasons

10. Customer and agent interact via messaging service and after conversation is complete, agent dispositions the interaction.

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

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

• After the conversation between the agent and the 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:**

**Apple Business Chat:**

• As long as the conversation is ongoing in Messages, the brand can post to the user as often as they want. There are no published time limits for responses. This means that the brand could send 100 messages after receiving the first message from the consumer. We would advise brands to exercise caution, though, and not "spam" consumers or use it as an outbound solution; we expect providers to monitor this kind of behavior and eventually step in.

• The consumer can end the conversation in Messages by left-swiping and deleting the message, sending a “Close” command to Genesys. Once the conversation is closed, the system cannot send any more messages to the consumer.

**WhatsApp/Facebook Messenger:**

• 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.

• WhatsApp: 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. Facebook Messenger: Only one message is allowed to be sent after the 24 Hour rule. This is called the 24h+1 rule.
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

- For Apple Business Chat only, the links behind the chat button can include an Intent ID and/or Group ID, which can be used for routing purposes or to indicate a specific product configuration.
- With each conversation
  - Apple passes the consumer’s language and device region, which can be used for routing purposes to the right agent.
  - WhatsApp passes the consumer’s phone number that was used to send the message from, allowing the brand to identify the consumer.

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 rich message elements, such as List/Date Picker, custom message extensions or Apple Pay in Apple Business Chat, or 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.

See **Standard Report Templates** for more information.

### 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 provide intraday tracking.

Relevant reports for this use case are found in the *Chat folder*, notably:

- **Interactions Acceptance Dashboard** — Use this dashboard to understand how long it takes for agents to accept customer interactions, and to identify what percentage of interactions are accepted promptly, or with some delay. Understanding interaction acceptance rate and speed can help you optimize agent performance and, by monitoring the time that customers wait before connecting to an agent, help to improve customer experience.

To use these reports to analyze messaging, filter the reports by Media Type to report on a specific channel (applebcsession, facebook, facebooksession, and/or whatsappsession), or all messaging channels.

See information about filtering data in a report, see **Understanding and using reports**, and for additional information about GCXI, see the *Genesys CX Insights 9.0 User’s Guide*.

### Customer-facing Considerations

#### Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>None</td>
<td>Digital</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Genesys Social Media Routing (CE19)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Self-Service and Automation</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Genesys Chatbots (CE31)</td>
<td></td>
</tr>
</tbody>
</table>
General Assumptions

- Connects to Genesys Engage on-premises via Genesys Hub in the Cloud; no on-premise driver is available (this enables Genesys to keep the connections up-to-date without requiring customers to upgrade/install each time there are changes with third-party messaging apps).

- **Apple Business Chat**
  - Customer must get approval from Apple before they can use Apple Business Chat. Apple has to approve the brand first to get an Apple ID, and then they have to approve them again once the use cases have been developed before they can go live. Without both approvals, a customer cannot go live.
  - Companies may not proactively reach out to consumers through Apple Business Chat; the consumer must initiate the conversation.
  - English-only for messages going through Apple Chat; other languages may work, but need to be tested as part of use case testing (limitation from Apple, not Genesys).
  - No HIPAA compliance (limitation from Apple, not Genesys)
  - The consumer has to initiate the first session. Such an initiation counts as an opt-in.

- **Whatsapp**
  - The brand must get approval from WhatsApp before they can use 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:
    - Click-to-action button on the brand’s website
    - Link in email signature
    - Sending them an SMS with an offer to switch to WhatsApp
    - IVR offering to channel-switch to WhatsApp (need to check first whether the customer is on WhatsApp). Within 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 (called HSM, a.k.a Highly Structured Message) and the brand has to pay for the message. Paid messages are billed to Genesys, and Genesys bills the brand on a monthly message based on the rates published by WhatsApp. See WhatsApp Rate Card (rate card) and also WhatsApp’s reference for additional (guidance) regarding what kind of messages are allowed.

N/A
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

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

• Workspace Desktop Edition Agent Help
• Workspace Desktop Edition User's Guide
• Contact history
• WhatsApp
• Chat

Document Version
• Version v 1.1.3 last updated July 12, 2021
Use AI powered journey analytics to observe website activity, predict visitor outcomes, and proactively engage with prospects and customers via agent-assisted chat, content offer or chatbot.

What's the challenge?

It’s challenging to identify the right individual, the best moments, and the optimal ways to offer assistance online. Companies want to shape their customers’ journeys and drive them towards desirable outcomes, but it’s hard to utilize all of the available data in a way that is meaningful and actionable. In addition, consumers expect fast answers, but it’s expensive to always engage an agent.

What's the solution?

Proactively lead customers to successful journeys on your website. Apply machine learning, dynamic personas, and outcome probabilities to identify the right moments for proactive engagement via a web chat or help content screen-pop.

Other offerings:
Genesys Cloud Genesys Engage cloud PureConnect

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
  • 6.2 Document Version
Use Case Overview

Story and Business Context

One of the biggest challenges for the modern business is learning to work with the data available in a way that is both meaningful and easy to act on. The data generated by a website often goes unexplored, and as a result, the intentions and reactions of individual customers and prospects can be overlooked. Focus is often placed on the broad strokes—key metrics such as the number of conversions per month—and the ability to identify the potential customers who need engagement is lost. As a result, customers who may be on the verge of signing up for a trial, completing a checkout, searching for information regarding service or support, or any other desirable outcome, fall through the cracks. The high volume of website traffic makes it a challenge to identify the right individuals, best moments, and optimal ways to engage in real time. Expectations for time-to-respond are increasing but growing your staff is costly.

Genesys Predictive Engagement uses machine learning to observe the progress of website visitors toward defined business outcomes—such as purchase completion or requesting a quote. The technology enables the business to use real-time observations and predictions rather than static rules, to trigger intervention only at the points when it is needed most.

For customers seeking service or support, a company’s website is often the first point of contact, even if it is only to find a phone number to call. But companies are challenged with making sense of and learning to use all the data generated by their website in a way that is both meaningful and actionable in real time. As a result, customers either end up calling into the contact center (an expensive support channel) or get frustrated with your business because they can’t find the help they need. Genesys Predictive Engagement prioritizes engagement with high value visitors and proactively offers chat to better utilize your staff and reduce your costs.

Examples of how the customer experience can be optimized by using data, context, and website behavior for a predictive engagement:

- Use of machine learning to detect the progress of website visitors toward defined outcomes—purchase completion, requesting a quote—and enable the business to trigger intervention only at the points when it is needed most.
- A customer who is recognized to be having trouble submitting a loan application is prompted with a proactive web chat enabling an agent to help the customer walk through the steps.
- A customer needs to activate their new mobile phone, goes to the website, and searches for "device activation." A proactive chatbot is offered to help the customer walk through the steps.
- A customer is planning a trip abroad and needs to notify their credit card company. They go to the company’s website and based on a search related to "travel alert," a chatbot is offered to assist to prevent the need to call the contact center.
- A customer is proactively offered self-help options to assist with a transaction, for example providing a link to a video to help with a Return Merchandise Authorization (RMA).

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:

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* Genesys Engage On-premises Use Cases 177
Genesys Predictive Engagement (CE37) for Genesys Engage on premises

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Conversion Rates</td>
<td>Follow individual customer journeys in real time on your website. Identify the moment of struggle or moment of opportunity and launch a chat or voice interaction with a sales agent at the right time to increase lead volume, improve lead qualification and reduce customer churn.</td>
</tr>
<tr>
<td>Improved Customer Experience</td>
<td>Offer assistance only when in need of reducing customer annoyance.</td>
</tr>
<tr>
<td>Improved Employee Productivity</td>
<td>Representatives are empowered with real time customer journey data which allows them to personalize and prioritize engagements with prospective and existing customers.</td>
</tr>
<tr>
<td>Increased Revenue</td>
<td>Retain customers by increasing customer satisfaction with faster and more personalized service. Improve the ability to up-sell and cross-sell existing customers with data based on their current interests, online journeys, and prior purchasing behavior.</td>
</tr>
<tr>
<td>Reduced Handle Time</td>
<td>When the engagement requires escalation from self-service to assisted service, the agent is provided context of the journey.</td>
</tr>
</tbody>
</table>

Summary

Understanding and using knowledge of online activities and behaviors can provide context to better handle a follow-up digital or voice interaction to help customers who are shopping, buying, using the company’s products across the full customer life cycle. This engagement intelligence can also be used for converting service requests to sales opportunities for cross-sell or up-sell. Genesys uses artificial intelligence to observe and analyze the progress of website visitors toward defined outcomes – service requests, pending transactions, application status. The technology allows the business to engage with customers using dynamic observations and predictions rather than simple static rules- creating happier customers, smarter employees, and better outcomes.

Companies have vast amounts of data within their CRM, marketing automation, contact centers and websites, and Genesys enables companies to unlock that data in real time to engage customers proactively, eliminating the need for a voice call or contact without context. Genesys Predictive Engagement observes individual customer journeys on your company website and applies machine learning, dynamic (or audience) segmentation, and real-time outcome scoring to identify the right moments for proactive engagement with the right customer via chat, chatbot, or content offer.

Predictive Engagement’s real-time engagement sophistication increases customer satisfaction, improves conversion rate, and optimizes the use of agent resources for the highest value customers. Predictive Engagement leads to improvement of key performance indicators such as call deflection, average order value (AOV), first contact resolution, and conversion rates.
Use Case Definition

Business Flow

Main Flow
Business Flow Description

1. The customer starts browsing the company website.
2. Genesys determines whether the customer is new or returning to the website, and associates data from previous journeys.
3. The combination of segment and variations in outcome score can trigger an offer to chat with an agent or a chatbot while the customer is browsing the website.
4. An algorithm determines the predicted availability of agents to handle the interactions.
5. If the customer accepts the invitation for chat, a registration window pops up where the customer can enter his data and the conversation with Genesys Blended AI Bots (CE31 Use Case) will start. In the registration form, customer can either manually enter his contact details (name, email) or contact details will be pre-filled if already known to Genesys.
6. In Genesys Routing logic, a decision can be made based using context (for example, customer segment, customer lifetime value) and current agent availability.
Business Flow

Routing

This diagram details the routing that takes place before and during the chat.
Business Flow Description

1. Genesys routes the interaction to an agent based on the skills, media, language, and other ACD routing choices.

2. An agent and customer are in conversation. The agent has access to full visitor context such as segment, journey information, and outcome score.

3. After the conversation ends, the agent sets a disposition code within their desktop to record the outcome of the conversation.
Business and Distribution Logic

Business Logic

BL1 – Customer Identification

The system can use cookies to detect returning visitors and associate them with previous site visits. Identity information provided during the journey (such as email address or phone number) is captured after it is explicitly submitted from the web page and can identify the visitor even across devices. After the customer is identified, all tracking data collected is associated to that specific customer. All customer information collected is done in a GDPR compliant fashion.

BL2 – Segment and Outcome Configuration

Segments are a way to categorize visitors on the website based on common behavior and attributes. Segments are configured upfront during system provisioning. A segment can be made up of one or both of these components:

- Attributes, such as browser type, device type, location, marketing campaign they are associated with, UTM parameters, and the referral website.
- Journey pattern, such as web browsing behavior, searches performed on the website, items clicked, returning users, cart abandoner, and high order value.

Outcomes or goals are specific tasks you want your visitors to perform on your website. As with segments, these are configured upfront. Typical outcomes include:

- Check order status or return status
- Open or check status of a trouble ticket
- Locate warranty or return policy
- Application submission
- Online purchase confirmation
- Submit payment
- Online quote
- Book a demo or appointment

Genesys uses predictive analytics to evaluate in real time the probability for a specific outcome to be achieved, based on segment and visitor behavior on the website (the outcome score).

BL3 – Action Map Configuration

Action maps determine the way to engage with the website visitor. Within action maps, you define the triggers that result in an action to the customer. These triggers can be based on any combination of:

- Segment
- User activity
- Outcome score (typically, a drop in outcome score for a specific segment can trigger a webchat)
BL4 – Customer Invite and Registration Window

Genesys Widgets will be used for:

- Invite messages for webchat
- Collection of visitor’s contact details
- Engagement over chat session

Distribution Logic

The distribution of the interaction is determined by the target expression and virtual queue configured in the Genesys Predictive Engagement rules.

User Interface & Reporting?

Agent UI

- Integration of Genesys Predictive Engagement desktop gadgets into Workspace Desktop Edition 8.5 (in case chatbot conversation requires escalation to an agent)

Reporting

Real-time Reporting

An admin can see the Live Now view of current visitors and live tracking information on the site. The views allow admins to make real-time operational decisions. For example, when a marketing campaign has gone live and drill into individual customer journeys.

Historical Reporting

The visitor activity report provides trend analysis and a drill-down by device type.

Reporting on segments matched and outcomes achieved (available through Predictive Engagement).

Action map performance of action types; webchat, content offers and architect flow. It allows a funnel drill-down performance of the key stages which can identify resourcing requirements, queue issues,

- Qualification
- Offer
- Acceptance
- Engagement

The Bot Dashboard provides a dashboard-style summary that you can use to evaluate the impact of Chat Bot, including visualizations of session and message volumes, and breaks down sessions based on whether bots, agents, or both, were involved. The dashboard report organizes data on the following tabs:
• The Bot Sessions tab provides an overall view of bot sessions, including information about:
  • Session durations
  • How many sessions were initiated, started, interrupted, or failed
  • Information about the number of messages sent and received by bots.
• The Media Sessions tab focuses on media sessions, contrasting the number of media sessions with the number (and percentage) of sessions with bots, and with the number of sessions (and percentage) with bots only.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
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</thead>
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<tr>
<td>None</td>
<td>Digital</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>• Genesys Chat Routing (CE18)</td>
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<tr>
<td></td>
<td>Self-Service and Automation</td>
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<td></td>
</tr>
<tr>
<td></td>
<td>• Genesys Chatbots (CE31)</td>
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<td></td>
</tr>
</tbody>
</table>

General Assumptions

• Genesys Widgets 9 must be used
• General logic for routing of interactions is defined with logic within the mandatory use cases
• Design and configuration of this use should account for previous deployment of mandatory use cases

Customer Responsibilities

• Customer must deploy both Genesys Predictive Engagement and Widgets code snippets on their website / web pages
Document Version

- Version v. 1.2.1 last updated July 12, 2021
Genesys Inbound

Genesys Inbound Use Cases for Genesys Engage on-premises

Sort or search the table to find the use case you need to edit. Click the title link to go to the use case.

<table>
<thead>
<tr>
<th>Use Case</th>
<th>Subtitle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Genesys Predictive Routing for Customer Service (BO06)</td>
<td>Place CX and agent efficiency at the center of your routing decisions using AI to match each customer interaction with the best agent</td>
</tr>
<tr>
<td>Genesys KPI Insights (BO07)</td>
<td>Monitor and analyze interaction data to detect addressable service level anomalies</td>
</tr>
<tr>
<td>Genesys Call Routing (CE01)</td>
<td>Route voice interactions to the best skilled resource</td>
</tr>
<tr>
<td>Genesys Personalized Routing (CE02)</td>
<td>Apply personalized routing to voice interactions</td>
</tr>
<tr>
<td>Genesys Callback (CE03)</td>
<td>Offer callback to queuing callers</td>
</tr>
<tr>
<td>Genesys Click-to-Call (CE21)</td>
<td>Enable click-to-call from your website or app to improve service and conversions</td>
</tr>
<tr>
<td>Genesys Predictive Routing for Sales (SL06)</td>
<td>Place revenue generation at the center of your routing decisions by using AI to match each customer opportunity with the best agent</td>
</tr>
</tbody>
</table>
Genesys Predictive Routing for Customer Service (BO06) for Genesys Engage on premises

Important
The capabilities described in this use case are under shipping control. Contact your Genesys representative for additional details.

Place CX and agent efficiency at the center of your routing decisions using AI to match each customer interaction with the best agent.

What's the challenge?

Today’s contact centers generate large volumes of data and have outgrown legacy skill and queue-based routing for matching customers and agents. It is almost impossible to optimize for metrics such as First Call Resolution (FCR) or Average Handling Time (AHT) because thousands of if-then rules have to be built and managed.

What's the solution?

Genesys Predictive Routing works in real-time, using AI to analyze 100s of data points to discover patterns to match customers to the best agents. With Genesys Predictive Routing, contact centers can improve customer experiences, grow revenue, improve efficiency, and optimize for important KPIs.

Link to video

Other offerings:

Contents

- 1 What's the challenge?
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• 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 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 Data Loader
  • 7.2 Routing and Reporting integrations
  • 7.3 Model performance
  • 7.4 Document Version
Use Case Overview

Story and Business Context

Companies want to improve their business Key Performance Indicators (KPI), capitalize on innovation in Artificial Intelligence and drive business decisions with the abundance of data and context available. Predictive Routing uses machine learning to support optimization of Customer Service KPIs.

Customer Service KPIs are metrics measuring a customer experience or efficiency outcome of an interaction, as opposed to Sales KPIs that measure the sales outcome of an interaction. Service KPIs can be of two types:

- Customer experience outcome such as Net Promoter Score (NPS), Customer Satisfaction (CSAT), First Contact Resolution (FCR), and Customer Effort Score (CES)
- Operational efficiency metrics such as Handle Time (AHT), transfers, hold count, hold time, cases open/closed, and back-office tasks opened

This use case illustrates an improvement in First Contact Resolution (FCR), captured from Genesys Info Mart or from 3rd-party surveys (for inbound voice interactions, for example). The use case also illustrates service-related KPIs, where the data for the KPIs is available in Info Mart or another available data source.

Predictive Routing also applies to Sales & Marketing KPIs. See Genesys Predictive Routing for Sales (SL06) for Genesys Engage on-premises

Traditional routing matches customers to agents through skills-based or queue-based logic. The goal is to maintain a service level, rather than to improve a KPI. Predictive Routing differs from traditional routing in that it uses machine learning to detect patterns in historical data from Genesys Info Mart and other third-party data sources. The predictive algorithm then uses these sources to build a model that predicts the business outcome of a customer's interaction when handled by an employee.

The predictive model works to improve KPIs by ranking agents according to their predicted impact on the business outcome. It then assigns the interaction to the highest ranked available agent. A/B testing measures the real-world impact of Predictive Routing on the target KPI by comparing Predictive Routing performance against the existing routing strategy.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Customer Experience</td>
<td>Reduce misroutes or repeated transactions to improve customer satisfaction by targeting the best agents to resolve different types of calls.</td>
</tr>
</tbody>
</table>
Use Case Benefits

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved First Contact Resolution</td>
<td>Improve First Contact Resolution by routing the interaction to the most proficient Agent available to handle it.</td>
</tr>
<tr>
<td>Reduced Employee Attrition</td>
<td>Improve Employee Experience by routing work to the Agent that they are more efficient or “good” at more often.</td>
</tr>
<tr>
<td>Reduced Handle Time</td>
<td>Reduce transfers and conferences by routing interactions to the best qualified agent and reduce average handle time by having more efficient workers take each interaction.</td>
</tr>
</tbody>
</table>

Summary

Organizations seeking to improve the level of customer service offered to their customers realize significant benefits from Predictive Routing. Machine learning models configured to optimize metrics such as First Call Resolution are at the core of the solution.

A customer calls the contact center, and Predictive Routing uses the data captured about the customer, their journey, and the current interaction to rank all available agents according to their predicted probability of resolving the call. Configuration options manage and balance the Service Level (speed to answer) with connecting to the most suitable agent. The result is a reduction in repeat contacts and improved FCR.

The outcome data feeds back into the machine learning model to inform future predictions. Impacts on KPIs and the performance of the machine learning models are available via real-time reports.

Use Case Definition

Business Flow

This business flow shows the use case from the perspective of the customer and agent.
Business Flow Description

1. The customer contacts the company using the inbound voice channel. This inbound interaction can be the result of a proactive rule on a web or mobile application.

2. One of the Inbound use cases for the corresponding media type handles the interaction and captures interaction context data. The exact data captured depends on the interaction and engagement type.

3. Based on the interaction context, Genesys selects an initial group of agents with the required skill(s) as possible routing targets to handle the interaction.

4. Predictive Routing calculates the scores of the agents in the target group using a machine learning model that takes into account the agents’ historic performance on similar interactions.

5. When there are multiple agents available, Genesys attempts to route the interaction to the available agent with a highest score.

6. If there is an interaction surplus and an agent becomes ready, Genesys selects an interaction from the queue taking into account the priority of each waiting interaction, the score the agent has for each interaction, and the time the interactions were queued.

7. If no agents are available within the configured timeout, the routing strategy expands the potential target pool of agents by reducing the skill requirements and then repeats the target agent selection using Predictive Routing.

8. After dealing with the customer call, the agent disconnects the interaction.

9. The outcome is mapped to Genesys Info Mart attribute (for example, a disposition code or custom key-value pair).

10. Optional: The customer is offered a survey. The answer to the survey is stored in a third-party system.

11. Optional: Outcome data, such as case management closure, is produced and stored by a third-party application.
Business and Distribution Logic

Business Logic

Routing Step 1

- Using a supported channel and media type, the customer creates an interaction. As the interaction is handled and traced through your environment, data is captured that enables you to determine the outcome for the metric you want to optimize.

- Prerequisite: This use case requires inbound call routing.

Routing Step 2

- The interaction use case identifies the customer's primary intention (Service Type) and sets the initial target skill expression.

Routing Step 3

- This step queues the interaction and is designed to cover both agent surplus and customer surplus scenarios. When either one or multiple agents are available (agent surplus scenario), the flow immediately proceeds. Otherwise, Genesys queues the interaction until an agent is available (customer surplus scenario).

Routing Step 4

- The predictor information along with necessary call information (Customer Profile, Interaction, Agent Profile) passes to Predictive Routing as a scoring request once one or more agents are available. The relevant machine learning model processes the request, resulting in a score for each available agent for that interaction. This process handles both customer surplus and agent surplus scenarios.

Routing Step 5

- The customer-to-agent matching provides the interaction score for each of the agents to the routing engine to identify the agents that can deliver the highest benefit to the target KPI. In an agent surplus scenario, the model compares the score of the highest ranked agent to the configured minimum score threshold. If the score is below the threshold, then the interaction is held until a higher-ranked agent becomes available or the threshold is reduced.

- In a customer surplus scenario, where multiple interactions are waiting when an agent becomes available, the agent’s scores for each waiting interaction are compared with the minimum score threshold. If the agent score exceeds the threshold for at least one interaction, the system proceeds to route the highest scoring interaction. If not, then the agent remains unassigned until a lower-scored interaction becomes available or the threshold is reduced.

Routing Step 6

- The minimum score threshold is reduced over time according to the preconfigured fallback strategy.

- The checks in Routing Step 5 repeat regularly until an agent-interaction matchup meets the threshold requirements.

  - Normal target expansion, such as relaxing skill level as configured within the underlying distribution strategy, occurs.

  - The continual reprioritization of the interaction also occurs, as do any treatments and the standard queued customer experience.

Routing Step 7
• The system delivers the interaction, handling any ring on no answer and exception situations as defined in the underlying use case.
• The customer and the agent connect.

Routing Step 8
• The interaction ends when the customer or agent disconnects the call.

Routing Step 9
• The agent desktop or a server-side process captures the interaction outcome. Genesys APIs invoke, either automatically or after an agent action, to map the outcome to a Genesys interaction attribute, which can be custom attached data or a disposition code.
• Genesys Info Mart captures this attribute in the Info Mart interaction record.

Routing Step 10
• Optionally, the customer receives a survey.
• If the customer completes the survey, the system collects and stores the outcome through a 3rd-party application.

Routing Step 11
• Optionally, a third-party application produces and stores the outcome data.

Distribution Logic
The inbound use case provides details of the distribution of an interaction to an agent. Refer to the flow above to understand how Predictive Routing influences the distribution logic.

User Interface & Reporting?

Agent UI
Target agents can review Attached Data/Case Data when an interaction routes to their Agent Desktop.

Reporting
Real-time Reporting
Predictive Routing does not include real-time reports. Operational reports are available in the Predictive Routing UI.

Operational reports include:
• KPI Outcome
• Feature Coverage
• Model Accuracy
Historical Reporting

The historical reports available through GCXI are the following:

- Predictive Routing A/B Testing Report - tracks A/B testing results for Predictive Routing models and predictors.
- Predictive Routing Agent Occupancy Report - tracks Agent Occupancy while Predictive Routing is being used to optimize routing.
- Predictive Routing Daily Queue Statistics Report - tracks KPIs for each Queue while Predictive Routing is being used to optimize routing.
- Predictive Routing Detail Report - interaction-level detail data about Predictive Routing use and its impact on KPIs.

*A/B reports can be developed from any standard or custom Info Mart data. If the outcomes data is NOT integrated with Info Mart, the creation of A/B reports must be evaluated as a separate effort.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
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<th>Exceptions</th>
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<td>• Genesys Call Routing (CE01)</td>
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<td>• Genesys Co-browse (CE27)</td>
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<tr>
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<td>• Genesys Personalized Routing (CE02)</td>
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<td>• Genesys Chat Routing (CE18)</td>
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<td></td>
<td>• Genesys Social Media Routing (CE19)</td>
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<td>Workforce Engagement</td>
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<td>• Genesys Outbound Dialer (CE11)</td>
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<tr>
<td></td>
<td>• Genesys Performance Management (EE14)</td>
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<td>• Genesys SMS Notification (CE12)</td>
</tr>
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<td></td>
<td></td>
<td></td>
<td>Self-Service and Automation</td>
</tr>
</tbody>
</table>

Genesys Engage On-premises Use Cases
All of the following required: | At least one of the following required: | Optional | Exceptions
---|---|---|---

**General Assumptions**

- Requires Product Management approval.

- Predictive Routing solution is offered to on-premises customers in a hybrid architecture that incorporates core functionality served from the Genesys Engage Cloud and components deployed in your own environment.

- Predictive Routing is offered as a managed service by Genesys Professional Services, who deal with all aspects of machine-learning model creation and maintenance. A Professional Services package is mandatory for implementation and support of Predictive Routing.

- The standard deployment materials address Inbound voice interactions based on Genesys Info Mart data only.

- Integration of additional data sources, whether Genesys or 3rd-party, requires a dedicated assessment and implementation by Genesys Professional Services.

- Customer must have implemented a use case for one or more channels and have deployed Genesys Info Mart reporting. These use cases populate the data used to build predictors and models, which direct how interactions are routed. Note that the capture and analysis of FCR KPIs is not part of Genesys Info Mart out-of-box statistics and is developed during model creation.

Note the exceptions where Predictive Routing cannot be integrated listed in the interdependencies section:

- Self-Service use cases

- Outbound preview and agent reservation used for Predictive and Progressive outbound

**Customer Responsibilities**

- Customer has already optimized traditional routing strategies and processes and wants to achieve further improvements.
• Customer has all compatible versions of URS, IRD, Genesys Info Mart, GCXI, and Pulse; or upgrades have been scoped in to the project plan.
• Customer has the necessary systems and processes in place to track results and measure impact over the life of the model.
• Customer identification is available and stored in Genesys Info Mart.

Related Documentation

Data Loader

Enables you to upload data, including dataset configuration and upload scheduling.

• Deploy Data Loader
• Configure Data Loader to upload data
• Configure Data Loader for Feature Engineering
• Set up data for import

Routing and Reporting integrations

The URS Strategy Subroutines component integrates with your existing Genesys Routing environment. Genesys Reporting produces reports based on KVPs that capture Predictive Routing interaction handling and outcomes.

• Deploy the URS Strategy Subroutines
• Integrate with Genesys Reporting

Model performance

The GPR web application is the user interface that provides reports on feature coverage and model accuracy.

• Monitor trends and performance

Document Version

• Version v 2.2.0 last updated July 12, 2021
Genesys KPI Insights (BO07) for Genesys Engage on premises

Important
The reporting functionality of this use case is already incorporated within the underlying use cases handling Inbound Interactions. For PS this use case consists of a pure consulting package to help the customer analyzing his data and finding route causes of Service Level Anomalies.

Monitor and analyze interaction data to detect addressable service level anomalies

What's the challenge?
You need quick and easy access to data insights that will help you improve results. When data is missing or is inconsistent across channels, and when business users find it difficult to get to information they need to make good decisions, customer and agent experiences suffer.

What's the solution?
Improve the customer and employee experience by giving business users a full view into real-time agent and workgroup activity and tools to take timely action. Genesys KPI Insights monitors performance against operational goals and provides simple filtering, drill-down and reporting to address service issues in a snap.

Other offerings:
PureConnect

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 and Distribution Logic

5 User Interface & Reporting?
   5.1 Agent UI
   5.2 Reporting

6 Customer-facing Considerations
   6.1 Interdependencies
   6.2 Document Version
Use Case Overview

Story and Business Context

Business users must be able to report, monitor and make decisions regarding their contact center/customer experience to both improve business outcomes and to move the needle. Knowing when changes need to be made, the impact of the change and when not to make changes requires the ability to rapidly identify anomalies and understand root cause behind the anomalies. Maintaining alignment between routing, reporting and resources is essential in streamlining the business and driving optimization.

Companies set their business plans annually or more regularly and the key KPI objectives that they will measure customer experience success against.

To manage the company's Contact Center objectives and meet end customer's business needs, there is a set of required operational key performance indicators (KPI) that are required. A good business practice is to analyse contact center performance through Service Level review to assess areas of focus in order to identify any remediation actions.

An example of a contributing factor to Service Level is Average Handle time. As such this business has set an objective for the Average Handle Time (AHT) KPI to be under 6 minutes for voice, email and chat interactions. While in some customer environments the AHT may be longer for Chat than voice this has been simplified as this is a simplified "essential use case".

The ability to generate the report ad-hoc or on a pre-scheduled basis is supported.

Historical reporting available on 15 minute increments if needed.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved First Contact Resolution</td>
<td>Provide visibility into call repetition pattern in reports</td>
</tr>
<tr>
<td>Increased Revenue</td>
<td>Isolate and track anomalies to facilitate root-cause analysis to remedy issues</td>
</tr>
<tr>
<td>Reduced Administration Costs</td>
<td>Increase visibility into training needs and skills-based routing through better reporting data. Provide readily available reports through KPI-based reporting</td>
</tr>
<tr>
<td>Reduced Interaction Transfers</td>
<td>Reduce transfers because of additional visibility attained through KPIs that help identify areas of training and skills-based routing optimization</td>
</tr>
</tbody>
</table>
Summary

Improve efficiency through historical reporting to provide improved agent utilization, reduced churn and enhanced customer satisfaction scores. Based on service levels set, customers need to be able to both monitor and analyse interaction data plus discover anomalies through reviewing detailed interaction data. Mapping this against business outcomes, across all channels and where appropriate, customers need to be able to make informed strategic and operational decisions that minimize these anomalies in the future.

Use Case Definition

Business Flow

The flow below describes how a team lead / supervisor would perform an analysis on low Service Level performance. The reports needed for this analysis are defined in the paragraphs below.
Business Flow Description

1. The actor (team lead, supervisor or business analyst) runs a report or a report is pushed to them.

Reference - BL1

1. He reviews the report against business level KPIs for service level, handle time, customer segmentation and media type (Interaction Volume Customer Segment Report).

Reference - BL2

1. If he finds anomalies in the service level, he analyses further reporting data to identify anomalies with contributing factors to Service Level. For example, he might find that Average Handling time was high as well.

Reference - BL3

1. He starts to drill down into further details (e.g. by filtering against queue or media type).

Reference - BL4

1. He analyses the information for anomaly details and correlations (e.g. Queue, ACW or Other KPI).

Reference - BL5

1. This information helps him to identify the root cause for the Service Level anomaly. As an example, he may identify that high ACW is driven by a certain Agent ID, Agent Group, etc.…Subsequently he identifies that the root cause is the skill levels of agents servicing a particular customer segment.

Reference - BL6

1. The team lead or supervisor takes appropriate action.
Business and Distribution Logic

Business Logic

Parameters and Business Rules

**BL1: Assign reports to roles within the company**

- The business decides during implementation and during operation which roles will receive reports pushed out to the users and which roles can run ad hoc analysis. In this example the team leader has the ability to receive reports via email and then perform the ad hoc analysis.
- The roles are then assigned to users of reports to either receive the emails or have a login to the online reporting
- This is part of Interactive Insights standard capabilities.

**BL2: Comparison of reports with business level KPIs:**

- The actor analyses the Interaction Volume Customer Segment Report and notices that the service level was not met for several hours the day before.
- The actor reviews the report against business level KPIs for service level, handle time, customer segmentation and media type.
- The actor reviews the service level in the report and notices that the service level is exceeded in certain periods yesterday as is AHT and decides to investigate.

**BL3: Analyse contributing factors**

- The parameters that drive AHT are Talk time, Hold Time and After call work. These can be filtered by a large amount of drivers of AHT such as Agent Group, media type, customer segmentation, Queue, intention, etc.
- When an anomaly is seen in average handle time in the reports the actor investigates the cause of the anomaly and the decision can be made by evaluating the Agent Group Customer Segment Report.
- The actor (e.g. team leader) has the AHT upper and lower values (confidence level) set for their team and measures against these values. The handle time parameters are part of the reporting and the upper and lower values are known to the actor.

**BL4: Drill down into details**

- The reporting user starts to drill down or filter the reports to identify the underlying root cause of the high handle time identified.
- The reporting user makes a decision as to where the underlying driver of the high handle time is coming from and identifies that its being driven by certain queues (e.g. Queue 1) on certain media type (e.g. Inbound Voice) by evaluating the Agent Group Customer Segment Report.
- The service level parameters are part of Interactive Insights reporting. e.g. ACW, hold time, talk time, etc

**BL5: Identify correlations**

- The drill down or filtering continues to identify the underlying root cause of the high after call work time identified at point 4.
When an anomaly is seen in the reports, the actor investigates the cause of the service level anomaly and identifies that ACW has risen at the same time that the service level was not met by evaluating the Agent Group Customer Segment Report.

The actor (e.g., team leader) is viewing the ACW time for the period that exceeded the service level. The service parameters are part of Interactive Insights reporting.

**BL6: Identify root cause**

The reporting user makes a decision as to where the underlying driver of the high after call work time is coming from and identifies that it is being driven by certain agent(s) and decides to look at their skill levels and tenure.

The parameters are part of Interactive Insights reporting by evaluating the Agent Group Customer Segment Report.

The actor then investigates the skill levels and that the newly hired agent(s) require training to reduce the handle time or if other corrective action should be taken such as changes to the routing, scheduling, skilling, etc.

**Distribution Logic**

Not applicable

**User Interface & Reporting?**

**Agent UI**

Workspace Desktop Edition (WDE), Workspace Web Edition (WWE), or other Genesys enabled agent desktop.

**Reporting**

Real-time Reporting

Not applicable.

This is for Omni-channel Analytics- Historical Reporting

**Historical Reporting**

Genesys CX Insights provides reports and dashboards that summarize contact center activity. Reports display contact center activity using easy-to-read grids, while dashboards summarize a wider range of information using a variety of visualizations. CX Insights enable users to analyze the data and empower them to take the data-driven decisions.

Here are are some the modern BI capabilities:

Provide Out of the box Reporting templates.

Empower individuals with self-service analytics.

Data Discovery & Dashboards.
Data Blending with different datasets.

Custom Reporting and personalized report views.

Create Custom HTML 5 Visualizations.

Personalized Alerts on Metrics.

14 Languages Support.

Here are some of the Contact Center reports & Dashboards that will enable business users to capture contact center KPIs

**Agent Performance Dashboard:**

Use this dashboard to view detailed information about agent activity in the contact center, including information about handle time, interaction volume, and relative ranking compared to other agents.

**Contact Center Dashboard:**

Use this dashboard to view detailed information about interaction volumes and KPIs for the whole contact center.

**Queue Dashboard:**

Use this dashboard to compare the performance of queues by viewing detailed information about agent performance on a queue-by-queue basis.

**Supervisor Dashboard:**

Use this dashboard to evaluate interaction handling and agent performance at a glance. It includes both key information about interaction volume and customer experience, and charts to illustrate each agent's activity during the reporting period.

**Business Results Reports**

- Interaction Volume Customer Segment Report - It must be possible to report the following KPIs:
  - % First Response Time Service Level
  - Avg Handle Time
  - Avg Wrap Time

- These KPIs must be available in the following dimensions:
  - Customer Segment
  - Media Type

**Agent Reports**

- Agent Group Customer Segment Report - It must be possible to report the following KPIs:
  - Avg Handle Time
  - Avg Wrap Time
• Engage Time
• Hold Time
• Wrap Time

• These KPIs must be available in the following dimensions:
  • Media Type
  • Agent Group
  • Customer Segment

**Detail Reports**

• Interaction Handling Attempts Report
  • Looking for Routing target which will contain the Skill Expression used to route the interaction to the agent.

**CX Insights** allows users to run and schedule reports for automatic distribution.

• Additional Report Benefits: This list of reports and benefits below are not all-inclusive. It just shows reports that are specific to troubleshooting Service Level issues. Many reports give you the data from a different perspective to help with root cause analysis.

• Agent Conduct Report
  • Compare agent performance in handling interactions against the agent's group, focusing on a few specific measures that demonstrate the possible mishandling of interactions - a high number of unaccepted interactions, excessive hold and after-call work (wrap) times, and shorter-than-usual engage (talk) durations with customers.

• Agent Group Customer Segment
  • agent-group performance by customer segment

• Agent Group Interaction Handling
  • Enables supervisors to monitor the interaction-processing performance of one or more groups of agents during a range of days that you specify.
  • Determine which agent groups are transferring too many interactions.

• Agent Group Queue Business Attribute
  • Categorizes how agent-activity results by a wide range of dimensions i.e. agent group, queue type, media type, interaction type, date

• Agent Group Service Type
  • Summarizes agent-group performance by service type with respect to interactions that are received within the contact center during a range of days

• Agent Interval Based Report
  • Manage contact center operations enabling viewing of key performance indicators that are related to the agents they supervise and to assess agent productivity

• Agent Not Ready Reason Code Report
  • Displays times when agents logged in and out and the duration of each login session during a range of hours that you specify within a day
• Agent Not Ready Report
  • Identify
    • The top five reasons (reason codes) that are used by agents cumulatively for entering the NotReady state.
    • The top five longest durations that are associated with the reasons that agents placed their devices in the NotReady state.
    • The top and bottom five agents who had the greatest and least percentage of their active time attributed to the NotReady state.

• Agent Queue Report
  • Enable supervisors to monitor the interaction-processing performance, as it relates to interactions, of an agent (or all agents) by the queue from which interactions were distributed during a range of days that you specify.
  • Provide the top and bottom 10% of agents who have the longest and shortest average hold times. Interaction processing (or handling) involves accepting interactions, placing calls on hold, consultations, transfers, after-call work, and conversing.

• Agent Summary Activity Report
  • Obtain snapshots of agent states for a given day and to assess agent productivity for interactions that begin and end during the given day

• Agent Utilization Report
  • Summarizes agent performance with respect to the customer and consults interactions that are processed within the contact center Although the Avg Engage Time and Avg Handle Time measures provide an indication of how effective an agent is in terms of customer service and handling interactions, these measures must be analyzed within the scope of the agent’s group. For example, results might show that a Tier 3 Technical Support agent has a higher average engagement time than the front-line agent who initially handled the interaction and routed it to the higher tier for further analysis. Indeed, the higher average across groups in this scenario might indicate the quality or complexity of service that is provided, rather than the proficiency of the agent in processing interactions.

• Agent Wrap Report
  • Enables supervisors to monitor the after-call work (wrap) call-related activities that an agent (or agent group) performs after processing calls and during a range of hours that you specify within a particular day
  • Rank the agents who spent the least (fastest 10%) and most (slowest 10%) amount of time in ACW mode.
  • Especially useful for viewing the progress of new agents as they make more (or fewer) calls to complete aftercall work than more established agents. With this data, you can determine whether you need to fine-tune Genesys Info Mart configuration to, for instance, send more information about a customer (that is, attached data) to the agent’s desktop.

• Customer Perspective Report
  • Summarizes contact center milestones from customer perspective providing the average response times, revenue and customer-satisfaction scores, and various service-level percentages of interactions that enter or begin with the contact center.
  • Describe how much time elapsed before customers got to speak to an agent or received a response, how satisfied were they with their transactions, and how much money they spent.

• Interaction Volume Service Subtype Report
  • Summarizes how interactions that enter the contact center are categorized into the service type and service subtype business attributes that are configured in your environment.
• Interaction Volume Service Type Report
  • Summarizes how interactions that enter the contact center are categorized into the service type and service type business attributes that are configured in your environment.

• Interaction Handling Attempt Report
  • This report summarizes segment-related details with regard to an agent's handling of contact center interactions.

• Transfer Detail Report
  • This report provides the detailed information about the initiating and receiving parties of those contact center interactions that involve a transfer.

• Interaction Traffic Group Report
  • This report summarizes contact center activity as interactions are offered to, abandoned within, and distributed from queues that belong to one or more queue group(s).

• Interaction Traffic Report
  • This report is helpful for determining the efficiency achieved on a specific queue because it provides the volume of interactions accepted in a given period, along with the average speed of answer and maximum delays experienced before acceptance or abandonment from the perspective of the queue. When results are interpreted in concert with results from the Speed of Accept and Abandon Delay reports, the overall productivity of your queue's can be assessed.

• Queue Outline Report
  • There are three main tabs in this report. The Customer Interaction tab shows how the number of interactions that entered a particular queue or queue group break down into the various queue-related measures that provide interaction counts. The Consult Interaction provides similar information for consult interactions that enter the queue/queue group. The Customer & Consults tab combines these results into one report. From this information, you can see how these measures interrelate and how they contribute to the sum total of all interactions (Entered) that entered a queue resource.

• Queue Summary Report
  • This report provides measures that relate to the interactions that enter a queue and that are either abandoned or distributed and handled by any routing target, such as an agent.

• Speed of Accept (seconds) Report
  • This report shows the number of interactions that were accepted within each of 10 time buckets and the percentages of interactions that were accepted in these buckets to the total number of interactions that were accepted from the queue. Pertains to short term interactions like a voice call.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.
## General Assumptions

- This use case is for Inbound interactions only.
- Customer must have Genesys enabled Self Service IVR/GVP, CIM, GIM and GI2, Agent desktop.
- KPIs out of box for Genesys Infomart (KPI: Various Operational metrics and/or business metrics e.g. SL, AHT, Transfers, Occupancy, Segmentation, Intention/Call type, Disposition, Queue volume, etc.)
- The following user roles will be supported within the scope of this use case: Team Lead, Supervisor, Business Analyst.
- Other requirements
  - Assume this use case has a pre requisite use case of inbound voice and/or Genesys Email and/or Chat
  - KPI captured and analyzed is part of GIM Out of box statistics
  - This essential use case is based on the Service Level metric
  - Once anomalies are identified in reports, the team lead/supervisor can take actions:
    - Call agents back from lunch or breaks early
    - Call extra resources in
    - Upload an announcement notifying customers of an event causing increased hold times (Requires this be available in routing and gives the customer the option to hang up)
    - Modify overflow parameters (Requires Routing have the capability and objects to be changes)
    - Train additional agents with the impacted skill to take care of the service level influencing interactions.
Genesys KPI Insights (BO07) for Genesys Engage on premises

Document Version

- Version v 1.0.1 last updated July 12, 2021
Genesys Call Routing (CE01) for Genesys Engage on premises

Route voice interactions to the best skilled resource

What's the challenge?

When your customers or sales leads call, they want to speak with someone who can fulfill their needs quickly. If they encounter excessive wait times or do not connect to the best representative in real time, they encounter unnecessary transfers, hold time, and repetition. This experience can result in customer frustration or loss of a potential sale.

What's the solution?

Create a unified virtual contact center by connecting customers to the representative with the best fit. Genesys call routing uses skills-based routing to direct calls to the resource best equipped to help, whether in your contact center, back office, a branch office, an outsourcer, or anywhere else in the world.

Other offerings:
    Genesys Engage cloud PureConnect

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 and Distribution Logic
    • 4.3 Distribution Flow
• 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 Workspace Desktop Edition
  • 7.3 Document Version
Use Case Overview

Story and Business Context

Organizations want to provide an exceptional customer and sales service experience by reducing transfers, hold time and repetition.

To achieve this experience, they need customizable software to fit complex rules, distributed using skills-based routing while automatically capturing each call disposition for analysis.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Customer Experience</td>
<td>Shorter wait times and more accurate resolutions by connecting inbound calls or leads to the best matched representative make better customer experiences and improve Net Promoter score</td>
</tr>
<tr>
<td>Improved First Contact Resolution</td>
<td>Captured omni-channel data is analyzed to drive process improvements to enable a superior customer journey and allows agents to be equip with the ability to handle calls on a First Contact basis.</td>
</tr>
<tr>
<td>Increased Revenue</td>
<td>The ability to route a sales calls to the best skilled sales representative increases sales conversions.</td>
</tr>
<tr>
<td>Reduced Handle Time</td>
<td>Genesys’ routing is far more efficient as it takes full customer context into consideration. This advantage in routing allows for more accurate and timely routing to the best agent to reduce wait time and costly mis-routes.</td>
</tr>
<tr>
<td>Reduced Transfers</td>
<td>Reduce the number of transfers due to better voice call routing through Genesys routing.</td>
</tr>
</tbody>
</table>

Summary

Customer wants to contact the company for a specific service or for further information around a product or offer and then calls the company. The system performs hours of operation, special day, and emergency checks, and then plays corresponding messages. The customer selects an option from a menu (prompt and collect) that maps to an agent skill expression. If no agents are available, the target expands to include an additional agent skill or skill-level before routing to an optional overflow number.

After the initial implementation, customers can enhance the service with more Genesys routing capabilities.
Use Case Definition

Business Flow

The flow describes the use case from the perspective of the caller and contact center agent. The following diagram shows the business flow of the use case:
Business Flow Description

1. The caller initiates an inbound voice call to the contact center. Optionally, Skype For Business Platform can be used.

2. The system checks if the day is configured as a special day. In this case a special day announcement is played and the call is disconnected.

3. The system checks if the call is within the contact center’s business hours. If not an out-of-office announcement is played and the call is disconnected.

4. The system checks if an emergency announcement is activated. In this case an emergency announcement is played and the call is disconnected.

5. A call steering message (DTMF menu) is played with various menu options (optional).

6. A greeting announcement is played.

7. The caller chooses a menu option using a DTMF tone entered on the handset. If the caller does not choose an option or chooses an unavailable option, the menu is repeated up to 2 times. If the caller still does not choose a valid menu option the call is handled with default routing parameters.

8. The call is distributed to the best-fit agent for the chosen topic based on the agent’s skill and skill level (see Distribution Logic for details).

9. At the end of the call the agent sets a disposition code to record the call outcome for reporting purposes.
Business and Distribution Logic

Business Logic

This chapter describes the business logic and business rules which drive the decisions made by the Genesys system within the business & routing flow above described in the chapters above, i.e. the parameters used by Genesys to drive routing decisions and how these are configured.

These parameters allow the user to configure a number of operational parameters related to routing logic, including the target skills for each menu option, priority tuning, timers and overflows. Some parameters are only available at DNIS / Route Point level. These are either needed only once at the beginning of the call flow (e.g. greeting message) or will be used across the whole call flow independent of subsequent DTMF menu choices of the customer. Other parameters are available at both the DNIS / Route Point level (to be used if no call steering has been activated) and at the level of the choice of a specific touch point. The following tables illustrate example parameters which may be configured through Genesys configuration tools.

Parameters to configure Service Line Announcements

The following parameters can be configured by service line:

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business hours</td>
<td>Sets the hours that you are open and accepting calls</td>
</tr>
<tr>
<td>Special day</td>
<td>A list of exceptions to the regular open hours, for a holiday or other reason</td>
</tr>
<tr>
<td>Emergency declared</td>
<td>Activates the emergency announcement (i.e. power outage, general closure)</td>
</tr>
</tbody>
</table>

Parameters to define the Call Steering / DTMF Menus

The use case allows users to define Menu options externally through parameters, thereby simplifying the flow. Based on the menu options chosen, corresponding caller segmentation can be done by this context.

Up to 4 levels of DTMF menus can be configured with maximally 9 different sub-options for each choice in the previous level. The combination of choices of the customer within the DTMF menu will determine the service requested and the agent skill required to best satisfy this request. This possibility provides highest flexibility to adapt the use case to a specific company requirement, but it is generally not recommended to use all available levels and number of menu choices to not provide a bad customer experience via a complicated and lengthy DTMF menu.

Distribution Parameters

The following list of parameters define the behaviour of the distribution logic. These parameters can be configured per combination of possible DTMF choices in the Call Steering.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Target</td>
<td>The skill and skill level expression to which the call will be routed. Alternatively, a DN or a specific Agent/Agent Group can be configured as routing target.</td>
</tr>
</tbody>
</table>
**Secondary Target**
The skill and skill level expression to which the call will be routed in the first target expansion step. Alternatively, a DN or a specific Agent/Agent Group can be configured as routing target.

**Tertiary Target**
The skill and skill level expression to which the call will be routed in the second target expansion step. Alternatively, a DN or a specific Agent/Agent Group can be configured as routing target.

The skill expression to define the target is defined by a combination of skill(s) and skill levels. Best practice is to use the same skill(s) with decreased skill level in subsequent targets to gradually expand the pool of agents after each timeout, rather than using a different skill. Priority tuning is configured via the following parameters:

- Priority increment (the amount to increase the priority after the interval time)
- Priority interval (the time between priority increases)
- Priority limit (the maximum priority)
- Priority start (the starting priority)

**Reporting Parameters**
The following five business parameters represent reporting categories and are completely customizable to your business model. You can assign different combinations of these parameters to each of your Inbound and Distribution parameter groups, to distinguish them in reporting and enable you to identify the unique properties of the parameter group.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>Business organization used as a category for reporting</td>
</tr>
<tr>
<td>Flow</td>
<td>A business flow used as a category in reporting</td>
</tr>
<tr>
<td>Intent Category</td>
<td>Business categories typically used as the top level of the call steering menu choices</td>
</tr>
</tbody>
</table>

**Audio Resources**
The following audio resources are configurable by service line:

<table>
<thead>
<tr>
<th>Name</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Hours</td>
<td>A message announcing office closure and inviting to call again at opening time</td>
</tr>
<tr>
<td>Please Wait on Hold</td>
<td>A message inviting to wait</td>
</tr>
<tr>
<td>Welcome</td>
<td>A Greeting message</td>
</tr>
<tr>
<td>Emergency</td>
<td>An emergency message</td>
</tr>
<tr>
<td>Special Day</td>
<td>A message announcing office closure due to special day (i.e. a bank holiday)</td>
</tr>
<tr>
<td>Music waiting in queue</td>
<td>Music</td>
</tr>
<tr>
<td>Name</td>
<td>Example</td>
</tr>
<tr>
<td>-------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Main DTMF Menu Message</td>
<td>The main Call Steering menu announcement</td>
</tr>
<tr>
<td>Sub-DTMF Menu Messages (multiple messages)</td>
<td>The sub-menu messages for the Call Steering as required.</td>
</tr>
</tbody>
</table>
Distribution Flow
Distribution Flow Description

1. The system checks whether any agents corresponding to the target are logged in. If no agents are logged in, the flow will continue with step 8.

2. If agents are logged in, the call is queued to the first target.

3. The system checks whether any agents are available.

4. If agents with the required target are available, the call will be distributed to the available agent who is longest idle.

5. If no agent is available, music is played while the caller is in queue.

6. The priority is increased according to priority tuning parameters.

7. The system checks whether the target timeout has expired (if configured). If the timeout has not expired, the call continues to wait for an available agent.

8. If the timeout has expired, then the system checks whether an additional target has been configured. If no additional target has been configured, the call continues to wait for an available agent.

9. If the next target is still internal, Genesys will attempt to distribute to the expanded target. Up to a maximum of two iterations of target expansion can be configured. The flow continues at step 1.

10. If the next target is configured to be an external number, the call will be forwarded to this number.
Distribution Logic

General distribution functionality

The distribution logic will include the following functionality:

- The target will be configurable by (final) DTMF choice. Additional targets are optional.
- RONA-functionality: If an agent does not accept the voice interaction, the voice call will be automatically put back into the distribution flow after a time out. The agent will be set to not-ready.
- Blending with other media types will be possible. Priority settings for voice interactions will be configurable to enable proper priority ranges between different media types. Capacity rules will be configured for the agents / agent groups to define what interactions can be handled in parallel (if any).

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.

If Skype for Business Platform is used for Inbound call (option), agents must Workspace Desktop Edition integrated with Skype for Business endpoint.

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 dashboard.

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

- Agent Group Status — Displays the current number of agents in their various interaction handling states by group.
Agent KPIs — Displays agent key performance indicators for agent groups and individual agents within those groups.

Agent Login — Displays agents that are logged in, what type of work they have been assigned, and their current status.

Queue KPIs — Displays call activity associated with the interaction queues.

See Standard Report Templates for more information.

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, and enable you to examine low-level interaction details, including handling attempts, flow, and transfers.

Some of the most relevant reports include:

- **Agent Summary Activity Report (Active)** — 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 with respect to the customer and consult 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 break down into the various queue-related metrics that 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 with regard to 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 more information about the Genesys CX Insights reports, see Genesys CX Insights 9.0 User’s Guide.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.
General Assumptions

- SIP connectivity is offered as a standard solution for Genesys Engage on-premises and Cloud.
- Optionally Skype for business can be offered for Genesys Engage on-premises only (not supported for Genesys Engage cloud).
- Implementation based on SIP Server (SIP Voice Blueprint).
- Routing parameters are configured through GAX operational parameter groups, which are referenced in the underlying strategy / routing application.
- Text To Speech and Speech Recognition are not included.
- No Genesys Voice Portal - all customer input is via DTMF prompt and collect.
- Genesys Infomart and Interactive Insights will be used for historical reporting.
- Workspace Desktop Edition will be used as agent desktop.
- Genesys Pulse will be used for real-time reporting.
- No Integration with third party systems.

For Skype for Business Connectivity (Option):

- Integration with Skype for Business based on Multimedia Connector (Skype for Business Blueprint)
- The agent uses Workspace Desktop Edition integrated with Skype for Business endpoint.
- No integration with 3rd party recording. GIR is the only available recording option with Multimedia Connector for Skype for Business.
- GIA is not supported as a standard option.
- PS team should be consulted for Skype for Business Platform deployment.
Related Documentation

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

- Agent Desktop 9 Help
- How Agent Desktop Works

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

- Workspace Desktop Edition Agent Help

Document Version

- Version v 1.2.2 last updated July 12, 2021
Genesys Personalized Routing (CE02) for Genesys Engage on premises

Apply personalized routing to voice interactions

What's the challenge?

When your customers call, they expect you to know who they are. If they are connected to employees who don’t have any information about them or their previous interactions — resulting in unnecessary repetition, effort and time — your customer experience scores suffer.

What's the solution?

Create an effortless experience by recognizing a repeat customer and prioritizing a connection to the same agent who previously served them. Offer expected wait times and the convenience of self-service or a call back. Genesys Personalized Routing uses context-based routing to direct calls to the best resource.

Other offerings:
   PureConnect

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 and Distribution Logic
  - 4.3 Distribution Flow
• 4.4 Distribution Flow
• 4.5 Distribution Flow
• 4.6 Distribution Flow

• 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 Workspace Desktop Edition
  • 7.3 Document Version
Use Case Overview

Story and Business Context

This functional use case has been created to enable companies to use Advanced Genesys Routing capabilities to improve customer experience by routing voice interactions to the best fit agent based on the type of request and customer context. The ability to recognize repeat customers is a very common scenario. Detailed routing behavior is driven by configuration parameters and rules, therefore providing a highly flexible framework to adapt to specific organization needs. The base 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.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Customer Experience</td>
<td>Routing calls based on customer context reduces familiarisation time and improves customer experience.</td>
</tr>
<tr>
<td>Improved Employee Utilization</td>
<td>Using customer context enables routing to agents who can handle the customer's specific query more quickly.</td>
</tr>
<tr>
<td>Increased Revenue</td>
<td>Routing calls to the same agent that the customer previously spoken to may increase the chances of completing a sale.</td>
</tr>
<tr>
<td>Reduced Handle Time</td>
<td>Enabling agents to handle queries more quickly improves employee utilization.</td>
</tr>
<tr>
<td>Reduced Transfers</td>
<td>Routing calls to agents based on customer context reduces the need for internal transfers.</td>
</tr>
</tbody>
</table>

Summary

A customer call is qualified within the IVR. The customer is identified and authenticated (if needed) within the IVR menu (not part of this use case). The customer ID is used to retrieve context data on the customer from Genesys Context Services. Based on his choices within the IVR and on the context data, he is routed to the best agent able to serve his request and potentially additional services, e.g. to realize up-sell potential. All relevant context information is displayed to the agent to enable high-quality service delivery. Providing the ability to recognize customers in all touch points and channels, orchestrating the interactions; enabling the agent to see the context to better serve the customer and being able to match callers with the same agent with whom they previously spoke are ways to deliver an excellent customer experience.

The logic of this use case is business rules driven and therefore flexible to changing needs and business environments.
Use Case Definition

Business Flow

The following flow describes the use case from the perspective of the main actors, i.e. the customer and the contact center agent. It provides a high-level view of the basic flow. The detailed description of the underlying call flow is described in Chapter “Distribution Logic”.
Business Flow Description

1. The customer calls one of the numbers of the contact center.

2. He is routed to an IVR application which is determining the service type and also performs an Identification and (optionally) Verification of the customer. This functionality is provided outside of the scope of this use case, it is assumed that the information on the requested service and customer identification is passed on to be used within this use case. The use case CE7 - Effective Identification and Validation in IVR can be used for this functionality. Alternatively, customer CLI is used for Identification.

3. If the customer calls outside of out-of-office hours or if an emergency situation is in progress, an announcement is played. After this the caller may be reconnected or diverted to another number inside or outside of Genesys.

4. Genesys retrieves context data on the customer based on the customer identification. If the contact center is open the routing parameters for this particular call is set based on the type of request and the customer context. This will enable flexible and personalized call handling.

5. The Expected Wait Time (EWT) for the customer is calculated and is announced to the customer (optional). If the EWT exceeds a specific threshold, an announcement is played and the caller is disconnected or routed to another number inside or outside of Genesys (optional).

6. Additional announcements are played to the customer. These announcements are based on the customer context. Examples include: Quality announcements/Special promotions/offers for the customer/Announcements for potential self-service options.

7. If the customer has been calling recently for the same type of request, Genesys can route to the last agent (configurable based on type of request and customer context). In case this agent is not logged in or not available for this call within a specified time out, the call is routed to the requested skill.

8. The call is distributed to the best agent who:
   - Has the base skill(s) to handle the original request.
• Has the supplementary skill(s) determined by the customer context (optional). Examples include: Skills to upsell a defined product / service to the customer or specific empathy skills based on the customer segment or demographic

• A cascading mechanism enlarges the potential agent pool by suppressing the supplementary skill and / or reducing the skill level on the base skill if the call cannot be distributed within specific timeouts.

9. Once the call is distributed to an agent, the call context information is displayed to the agent. As an example, the agent is able to see any special offer or promotion for the customer, so he can start the relevant information. The agent handles the customer request and any potential up-/cross-sell opportunity.

10. After the conversation with the customer, the agent records the outcome of the call for reporting purposes e.g. if he has acted on the presented lead

Business and Distribution Logic

Business Logic

Emergency Check

Emergency mode activation is enabled at three levels: Global, Service (Type of Request) and Queue. The emergency mode is not only checked at the beginning of a call, but is constantly monitored during call queuing. If an emergency flag is set for a queued call, the corresponding emergency announcement is played, and the configured action applies to the call (disconnect or deflect to another number within or external to Genesys).

Furthermore, Genesys runs a parallel stream to continually check if agents are logged onto the platform. If no agents are detected, then an emergency mode is automatically activated.

EWT Announcements

Announcement of Expected Wait Time to customers is handled based on predefined recordings. It is a good practice to announce expected wait times approximately to not jeopardize customer expectation. Six thresholds are configured which can trigger different announcements. Default values are: 60, 120, 180, 300, 600 and 1200 seconds. The announcement text should match the threshold.

Last Agent Routing

The last agent(s) a customer spoke to is stored within Context Services (part of Universal Contact History) including the base skill which was required for the corresponding service. When a customer calls the contact center for the same service and Last Agent Routing is enabled, Genesys checks in Context Services for a recent contact, not
older than a configurable threshold, handled by an agent with the required skill. The corresponding agent is used for Last Agent Routing.

In case of multiple matches, the most recent entry is used.

**Busy Treatment**

Messages and Music are played for queuing calls. It is possible to configure up to six messages with music treatment in between. The first two messages and associated music treatments are played once, the remaining 4 messages and music treatments are looped until the call is answered or abandoned.

**Skill Model**

**Skill types**

The skill model, used for distribution, is based on three logically different skill types which define attributes and knowledge of the agents:

**Basic skill**

This skill is required to handle a specific type of request or service. One basic skill is required for each call for the distribution of calls to agents.

**Language skill**

This skill type determines the language in which a call shall be answered. The requested language is provided via the IVR. If no language is provided, a default language is used. One language skill is required for the distribution of calls to agents.

**Supplementary skill**

Genesys Routing utilizes supplementary skills for enhanced routing logic and personalization. Supplementary skills are defined by customer specific context data.

The following provides an example:

- A customer calls the service hotline for "Account Transactions."
- He successfully identifies and authenticates within the IVR. The corresponding data are passed to Genesys.
- The caller's profile within Context Services indicates that the caller is eligible for a Platinum Credit Card up-sell.
- In this case, the call should ideally be routed to an agent with the base skill "Account_Handling" and the supplementary skill "Up-Sell" to ensure that he can handle both the original request and successfully convert the up-sell opportunity for this customer.

**Skill level**
Each agent has one or more skills associated to their profile and a skill level associated to each base skill, referred to in this document as proficiencies. The skill level is used to define primary, secondary and tertiary targets within the routing logic described in section "Targeting". The targets are defined as follows:

- Primary target = Agents with base skill level > N & language skill > 0
- Secondary target = Agents with base skill level > M & language skill > 0
- Tertiary target = Agents with base skill level > P & language skill > 0

N, M, and P are configurable based on request type and customer context.

**Priority Model**

Different priorities are set for calls according to business value of the type of request. If priorities are set and an agent becomes available, Genesys distributes the call with the highest priority matching the agent's skills. This is specifically relevant if the agent can receive interactions for different types of request. The priority of a call is increased over time to make sure that low-priority calls are still distributed to an agent after a potential longer waiting time (priority tuning). Priority tuning is configured via the following parameters:

- Priority start (the starting priority)
- Priority increment (the amount to increase the priority after the interval time)
- Priority interval (the time between priority increases)
- Priority limit (the maximum priority)

These values are configurable by type of request and by customer context.

In addition, a priority mark-up is configured for customers who have previously completed IDV or ID within the IVR to account for their additional time within the IVR compared to customers who did directly drop out into the queue. The priority mark-up for customers who attempted / complete IDV and ID is relative to the amount of time it takes to complete the IDV and ID verification application within the IVR.

Transferred calls and RONA calls can also get a higher priority assigned.

**Transfer**

The agents can transfer calls 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 WDE.

**Additional functionality**

- RONA-functionality: If an agent does not accept the call, the call is automatically put back into the distribution flow after a time out. The agent is set to not-ready.
- This use case can be combined with other non-voice use cases. Blending is possible. The configuration of priority values need to be synchronized with priority settings for other media types to allow an ordering of interaction within the universal queue corresponding to business requirements. Capacity rules will be configured for the agents / agent groups to define what interactions is handled in parallel (if any).

**Context Service Data**
Customer Context is stored within Genesys Context Service as part of the Universal Customer History Server. The data is provided by the organization. A regular update process has to be set up. Instructions to map the organization’s specific data with the data stored in Genesys need to be determined. The following data scheme provides flexibility to map specific organizational data with data to be used within Genesys. The data is used for routing rules or for display of the agent desktop. Context data related to a list is only used if the time and date of the call is within the List Stop and List Start data. The following table shows the available data and how these are used:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Definition</th>
<th>Agent Desktop</th>
<th>Routing Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer ID</td>
<td>Unique identifier of the customer</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>Customer Name</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Segment</td>
<td>Customer Segment</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Customer Data 1</td>
<td>Additional information on the customer to be used in rules</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Customer Data 2</td>
<td>Additional information on the customer to be used in rules</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Customer Data 3</td>
<td>Additional information on the customer to be used in rules</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Customer Data 4</td>
<td>Additional information on the customer to be used in rules</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Customer Data 5</td>
<td>Additional information on the customer to be used in rules</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Display Data 1</td>
<td>Custom Attribute to be displayed at agent desktop</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Display Data 2</td>
<td>Custom Attribute to be displayed at agent desktop</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>List Name</td>
<td>This data is used to indicate that the customer is on a specific list / campaign</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>List Type</td>
<td>Type of the list or campaign</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>List Start</td>
<td>When actions for a list / campaign starts</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>List Stop</td>
<td>When actions for a list / campaign stops</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>List pop message</td>
<td>Message to be displayed to agent</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>List actioned</td>
<td>Indicates if the list / campaign has been already actioned. If the list / campaign has been</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>
Parameters available per type of request / service

The following lists the business parameters which are configurable by service. These are configured by Genesys Administrator Extension. Please note that the list is not exhaustive as additional parameters for technical settings might be required. It also does not reflect the technical realization and naming conventions to be used. Also some of the parameters are combined for ease of readability. The list is intended for business readers to give an overview of the flexibility in the configuration of the routing logic:

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Name</td>
<td>Name of the service.</td>
</tr>
<tr>
<td>Enable Rules</td>
<td>Flag to indicate if rules are used for the service. If rules are not enabled for the service, the default parameter settings within GAX are used.</td>
</tr>
<tr>
<td>Service Emergency Flag</td>
<td>Flag to set emergency status for the service.</td>
</tr>
<tr>
<td>Open hours</td>
<td>Sets the opening hours of the service.</td>
</tr>
<tr>
<td>Special Day</td>
<td>A list of exceptions to the regular open hours, for a holiday or other reason.</td>
</tr>
<tr>
<td>After Hour Message</td>
<td>Message to be played if the call is out of business hours.</td>
</tr>
<tr>
<td>Special Day Message</td>
<td>Message to be played if the call is on a special day.</td>
</tr>
<tr>
<td>Emergency Message</td>
<td>Message to be played in emergency situations.</td>
</tr>
<tr>
<td>EWT flag</td>
<td>Flag to determine if EWT shall be announced to a customer.</td>
</tr>
<tr>
<td>EWT Thresholds</td>
<td>6 Thresholds to activate different EWT announcements (see chapter &quot;EWT Announcements&quot;).</td>
</tr>
<tr>
<td>EWT Announcements</td>
<td>6 pre-recorded EWT announcements corresponding to the 6 thresholds above.</td>
</tr>
<tr>
<td>EWT Breach Threshold</td>
<td>Threshold to determine if a call is queued (see chapter &quot;Expected Wait Time Check&quot;).</td>
</tr>
<tr>
<td>IDV Type</td>
<td>Level of ID&amp;V required for the type of request. Values are &quot;None&quot;, &quot;ID&quot; or &quot;ID&amp;V&quot;. This value is displayed to the agent.</td>
</tr>
<tr>
<td>Quality Message</td>
<td>The quality message to be announced to the customer (see chapter &quot;Main Flow&quot;).</td>
</tr>
</tbody>
</table>

Parameters available per customer context and type of request / service

The following lists the business parameters which are configurable by service and customer context. Default values for these parameters are configured by Genesys Administrator Extension per service. These base parameters are overwritten by parameters defined by rules using additionally the customer context. These rules are configured in Genesys Rules Engine. Please note that the list is not exhaustive as additional parameters for technical settings
might be required. It also does not reflect the technical realization and naming conventions to be used. The list is intended to give business users an overview of the flexibility in the configuration of the routing logic:

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Special Message 1&amp;2</td>
<td>The special messages to be played after the quality message (See chapter “Main Flow”).</td>
</tr>
<tr>
<td>Last Agent Routing enabled?</td>
<td>Flag to indicate if Last Agent Routing is enabled for the Service</td>
</tr>
<tr>
<td>Last Agent Routing Time Out</td>
<td>Time out used to wait for the last agent.</td>
</tr>
<tr>
<td>Basic skill</td>
<td>Basic skill required for this call</td>
</tr>
<tr>
<td>Supplementary skill</td>
<td>Supplementary skill for this call</td>
</tr>
<tr>
<td>Supplementary skill timeout</td>
<td>Timeout to wait for an agent with the supplementary skill.</td>
</tr>
<tr>
<td>Skill Level Targets 1-3</td>
<td>Skill level thresholds to define the primary, secondary and tertiary target. The skill level defined provides the minimum skill level for the corresponding target.</td>
</tr>
<tr>
<td>Timeout 1,2</td>
<td>Timeouts to wait for the primary and secondary target.</td>
</tr>
<tr>
<td>In Queue Messages and Music</td>
<td>Parameters to define the in busy treatments as described in chapter Busy Treatment.</td>
</tr>
</tbody>
</table>

**Reporting Parameters**

The following five business parameters represent reporting categories and are completely customizable to your business model. You can assign different combinations of these parameters to each of your Inbound and Distribution parameter groups, to distinguish them in reporting and enable you to identify the unique properties of the parameter group.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>Business organization used as a category for reporting</td>
</tr>
<tr>
<td>Flow</td>
<td>A business flow used as a category in reporting</td>
</tr>
<tr>
<td>Product</td>
<td>A product or product group used in reporting</td>
</tr>
<tr>
<td>Service</td>
<td>Business categories typically used as the top level of the call steering menu choices</td>
</tr>
</tbody>
</table>

**Distribution Flow**

(1) Main Distribution Flow
Distribution Flow Description

<table>
<thead>
<tr>
<th>Nr.</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The customer calls one of the numbers of the contact center.</td>
</tr>
<tr>
<td>2</td>
<td>The IVR determines the type of request (or service) and the customer ID (out of scope for this use case).</td>
</tr>
<tr>
<td>3</td>
<td>Genesys performs a check if the customer calls within the business hours for his requested service. The call may be: Within business hours/ After hours/ On special days (e.g. public holidays). In the last two cases, a corresponding announcement is played. The caller is either disconnected or deflected to a different number inside or outside of Genesys for further processing.</td>
</tr>
<tr>
<td>4</td>
<td>Genesys performs a check if an Emergency Condition is activated for the call. In this case, a corresponding announcement is played and the call is either disconnected or deflected to a different number inside or outside of Genesys for further processing.</td>
</tr>
<tr>
<td>5</td>
<td>The expected wait time is calculated. If the expected wait time is beyond a configured threshold, a corresponding announcement is played and the call is either disconnected or deflected to a different number inside or outside of Genesys for further processing.</td>
</tr>
</tbody>
</table>
Distribution Flow

(2) Expected Wait Time Check

<table>
<thead>
<tr>
<th>Nr.</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>outside of Genesys for further processing.</td>
</tr>
<tr>
<td>6</td>
<td>A quality message is played to satisfy compliance requirements.</td>
</tr>
<tr>
<td>7</td>
<td>Up to two special messages are played which depend on the type of request and the customer context.</td>
</tr>
</tbody>
</table>
## Distribution Flow Description

<table>
<thead>
<tr>
<th>Nr.</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Genesys calculates the Expected Waiting Time for the call.</td>
</tr>
<tr>
<td>2</td>
<td>If the EWT is beyond a configurable threshold, the flow returns to the main flow to determine further processing.</td>
</tr>
<tr>
<td>3</td>
<td>The Expected Wait Time is announced to the customer based on predefined intervals and pre-recorded announcements.</td>
</tr>
</tbody>
</table>
Distribution Flow

(3) Targeting
Distribution Flow Description

<table>
<thead>
<tr>
<th>Nr.</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Genesys determines if Last Agent Routing is activated for the call (configurable by type of request and context data, such as customer segment).</td>
</tr>
<tr>
<td>2</td>
<td>If Last Agent Routing is activated, Genesys verifies if the customer has spoken to an agent for the current type of request within a configurable time period. In case of a matching entry, Genesys attempts to distribute to this agent. After a configurable timeout the call continues with the distribution to the skill.</td>
</tr>
<tr>
<td>3</td>
<td>Genesys calculates the Expected Wait Time (EWT) for the call based on a distribution to the primary target group of all agents being able to handle the service (without any supplementary skill). If the EWT is above a configurable threshold, the routing logic immediately continues with the secondary target group.</td>
</tr>
<tr>
<td>4</td>
<td>Genesys checks if a supplementary skill is required based on the customer context data.</td>
</tr>
</tbody>
</table>
| 5   | In this case, Genesys queues the call for all agents within the primary target group who also have the supplementary skill. If an agents becomes available before the
<table>
<thead>
<tr>
<th>Nr.</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>configurable timeout is reached, the call is distributed to this agent. Otherwise, the target is expanded to the full primary target group.</td>
</tr>
<tr>
<td>6</td>
<td>Genesys targets all agents within the primary target group. If an agent becomes available before the configurable timeout is reached, the call is distributed to this agent. Otherwise, the target is expanded to the secondary target group.</td>
</tr>
<tr>
<td>7</td>
<td>Genesys targets all agents within the secondary target group. If an agent becomes available before the configurable timeout is reached, the call is distributed to this agent. Otherwise, the target is expanded to the tertiary target group.</td>
</tr>
<tr>
<td>8</td>
<td>Genesys targets all agents within the tertiary target group until an agent becomes available.</td>
</tr>
<tr>
<td>9</td>
<td>When an agent becomes available, Genesys distributes the call to this agent.</td>
</tr>
</tbody>
</table>

**Distribution Flow**

(4) Conversation
### Distribution Flow Description

<table>
<thead>
<tr>
<th>Nr.</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>When the call is distributed to the agent, all relevant information on the call and the customer context is displayed at the agent workspace.</td>
</tr>
<tr>
<td>2</td>
<td>The agent handles the customer request.</td>
</tr>
<tr>
<td>3</td>
<td>The customer may not have identified and verified upfront, but his request may require identification and potentially verification. In this case, the agent can handle this manually via a third party system (outside of the scope of this use case).</td>
</tr>
<tr>
<td>4</td>
<td>Once the customer is identified (and verified), the agent can update the customer Id and Verification status in Genesys. The customer context is retrieved from Genesys and</td>
</tr>
</tbody>
</table>
Distribution Logic

**Call Qualification & Customer Identification (outside of scope of this use case)**

As a prerequisite for this use case call qualification and customer identification is handled by an IVR application upfront of the start of this use cases. This IVR application is outside the scope of this use case. Use case CE7 - Effective Identification & Validation in IVR can be used for this functionality.

The assumption is that Genesys receives the following information from the IVR:

- Type of Request / Service (either via DTMF, natural language recognition or IVR intelligence).
- Caller language
- Caller identification
  - Information on the status of the identification:
    - Anonymous
• Identification provided
• Identification and Verification (ID&V) provided

• Customer ID
  • the customer ID might be any ID as used by the organization which identifies the customer
  • Alternatively the CLI is used for customer identification, however this is less reliable

This input is used to determine the parameters for the specific customer call.

**Remark on naming convention in this document:**

“Type of request/service” is the mapping of a customer call to his need by using an IVR prequalification like DTMF menu. Therefore it may be more granular than a published service number for the contact center, or a department within the contact center (e.g. Sales, Billing). The latter is sometimes also referred as service within some organizations. However, in this document, “service” is used interchangeably with “type of request” and referring to the more granular definition.

**User Interface & Reporting?**

**Agent UI**

**Context Data**

When a call is distributed to an agent the following data is displayed:

• Context Services Data as defined in chapter “Context Service 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

**Call Outcome / Disposition Code**

If a lead is presented to an agent, the outcome can be classified within Agent Desktop. The outcome includes information about whether the lead has been actioned. Lead actioned data is stored in Context Services to prevent the interaction from being directed to an agent again.

Additionally, the call outcome is used for reporting.

Many different call outcomes / disposition codes can be configured.

**ID&V**
Agents can handle manual Identification and (optionally) Verification if required for the specific customer request. ID&V is handled in an application outside of 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. See also section “Conversation”.

General Requirements

• Agents can transfer calls to other individual agents.
• Configuration of not-ready reason codes (for example: Admin Work, Lunch, Meeting, Pause, RONA).

Reporting

Real-time Reporting

Genesys Pulse is a Genesys Administrator Extension (GAX) plug-in application that offers personalized dashboards based on specific functional, geographical or organizational needs. Pulse dashboards present information using graphical “widgets” that can be viewed as graphs or tables, showing information about specific key performance indicators, such as service level, interactions handled, and the average handle time. With Pulse you can:

• Monitor the current state and activity of Contact Center objects to help make decisions 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 Inbound templates
  • Agent KPIs
  • Agent Group Status
  • Agent Login
  • Queue KPIs

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 you can use assess 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 include:

• Customer Perspective Report — Summarizes contact center milestones from a customer perspective, providing the average response times, revenue and customers satisfaction scores, and various service level percentages of interactions that enter or begin with the contact center. This report also provides such summary values as the average revenues generated by each customer segment, by media type, and to evaluate the average customer satisfaction scores. Attributes applied to these metrics include customer segment, service type, and media type.
• Interaction Volume Customer Segment Report — Provides detailed information about how interactions that enter the contact center are categorized into the business-result attributes that are configured in your environment, including analysis (based on the Entered with Objective metric) of the service level within the perspective of the total number of interactions that are offered to resources by day over the reporting interval.
• **Business Metrics Executive Report** — Highlights exceptions to service level by business result, customer segment, and service type for those interactions that have defined a baseline service objective that is greater than zero (0). The Entered with Objective metric enables you to gauge service level within the perspective of the total number of interactions that were offered to resources, by day, over the reporting interval.

• **Interaction Handling Attempt Report** — Summarizes segment-related details with regard to an agent’s handling of contact center interactions that are stored in the Info Mart INTERACTION_RESOURCE_FACT table, providing both the time that was required to distribute the interaction to the agent and data about the agent’s contiguous participation in the interaction.

• Other reports relevant to this use case are found in the Agents, Business Results, Detail, and Queues folders.

For more information about Genesys CX Insights, see the *Genesys CX Insights 9.0 User’s Guide*.

**Customer-facing Considerations**

**Interdependencies**

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>None</td>
<td><strong>Self-Service and Automation</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Genesys Customer Authentication (CE07)</td>
<td>None</td>
</tr>
</tbody>
</table>

**General Assumptions**

• Implementation based on SIP Server (SIP Voice Blueprint).

• Routing parameters are configured through GAX operational parameter groups or Genesys Rules Engine, which are referenced in the underlying strategy / routing application.

• Genesys Infomart and Interactive Insights is used for historical reporting.

• WDE is used as agent desktop.

• Pulse is used for real-time reporting.

**Customer Responsibilities**

• The IVR application to determine the type of request and customer ID is not part of this use case and has to be provided separately.
• Alternatively, SIP Qualification and Parking with a script controlled by routing are used if full GVP application is not required. This functionality is also not included within the use case.

• All announcements are to be provided by the customer

• A process to upload and update customer data within Genesys Context Services needs to be set up.

Related Documentation

Agent Desktop

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

• Agent Desktop 9 Help
• How Agent Desktop Works

Workspace Desktop Edition

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

• Workspace Desktop Edition Help
• Disposition Codes

Document Version

• Version version 1.1.4 last updated July 12, 2021
Genesys Callback (CE03) for Genesys Engage on premises

Offer callback to queuing callers

What's the challenge?

When callers wait in long queues, customer frustration with your brand goes up right along with your abandonment rate. However, always keeping staff at peak performance level is costly and inefficient. You need a way to distribute calls during peak times to meet your service levels and keep callers happy.

What's the solution?

An alternative to waiting on hold can make the difference in a customer's experience. After a threshold of time, give callers the wait time and the option of receiving a callback. Now you can deliver higher customer satisfaction without maintaining a peak-level staff.

Other offerings:
Genesys Engage cloud PureConnect

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 Document Version
Use Case Overview

Story and Business Context

This use case enables companies to improve customer experience by providing wait time information and callback functionality. Dynamic treatment can be applied to transfers, playing different messages and providing different customer experiences based on the length of the wait. Businesses can specify wait time thresholds and, using reporting, monitor and quickly adjust the outcome if required.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Customer Experience</td>
<td>Offering callback and providing wait time information during busy times rather than keeping customers on hold improves the customer experience.</td>
</tr>
<tr>
<td>Improved Employee Utilization</td>
<td>Smoothing of inbound call volumes with offer of callback during busy times improves employee utilization.</td>
</tr>
<tr>
<td>Improved First Contact Resolution</td>
<td>Offering callback reduces the instance of follow-up and repeat calls by customers who have previously abandoned.</td>
</tr>
<tr>
<td>Reduced Handle Time</td>
<td>Customers who have not been kept on hold are less likely to spend time ‘venting’ in frustration, so reducing handle time.</td>
</tr>
<tr>
<td>Reduced Interaction Abandonment</td>
<td>Setting customer expectations about wait time with the offer of a callback reduces abandonment rates.</td>
</tr>
</tbody>
</table>

Summary

No one likes to wait on hold. When a customer is waiting to speak to an agent, and the expected wait time to reach an appropriate agent exceeds a specified configurable threshold, they are presented with the option to receive a callback, either as soon as possible or at a scheduled future time. Different treatment can be applied and a different message presented based on the length of the wait.
Use Case Definition

Business Flow

(1) Callback Offer

The business flows describe the use case from the perspective of the customers and the system.
Business Flow Description

1. A customer calls a service line of the company.
2. The customer requests to speak with an agent.
3. The system verifies the estimated wait time (EWT) for an agent qualified to handle the request. If the wait time is below the specified threshold, the caller is immediately transferred to the corresponding queue to wait for an agent with the requested skill. Please note that the logic to route calls to agents is not within the scope of this use case. This use case relies on existing inbound voice functionality described in the prerequisites CE01 or CE02.
4. When the Estimated Wait Time threshold is exceeded, a wait time announcement can be played to the caller. This can be a generic announcement or, ideally, a broader range estimate like "between 5 and 10 minutes" or "less than 10 minutes."
5. After the announcements, the customer hears callback options.
6. If the customer chooses an Immediate or Scheduled Callback, they are asked if the ANI on which they called in is the callback number. If the customer confirms, move to next step. If the customer does not confirm, they are prompted to enter the new callback number and are asked to confirm it. If the customer chooses an Immediate Callback, they are placed in the router's queue (see the Callback flow below). If the customer chooses a Scheduled Callback, they are asked when they want the callback (see the Register Scheduled Callback flow below).
7. If the customer does not accept the callback offer, the call is transferred to the corresponding waiting queue.
8. Optionally, you can play a recorded description of a callback.
Business Flow

(2) Callback
Business Flow Description

1. Consumers can request a scheduled or immediate callback:
   a. For a Scheduled Callback, at the requested time of the callback, the call is queued to be distributed to an agent with the right skill.
   b. For an Immediate Callback, when the caller's turn in queue is reached, they are put in position number one.

2. Based on predicted agent availability for the callback, a call is initiated to the customer phone. Call progress detection is used to detect if a human has accepted the call.

3. Up to three call attempts to reach the customer are performed. If the customer does not accept the request after the third attempt, then the callback is cancelled.

4. If the customer accepts the call, an announcement informs the customer that this is the requested callback. A sample announcement text could be: "This is your requested callback from company XYZ. Please press 1 to confirm that you requested this callback and you will be connected to an agent."

5. Customer confirms their desire to connect to the agent.

6. Customer and agent are connected.
Genesys Callback (CE03) for Genesys Engage on premises

Business Flow

(3) Register Scheduled Callback
Business Flow Description

1. The customer chooses a day and time for their callback from a selection of configured times.

2. If the time slot is available, the system confirms it. If the time slot is not available, the system offers 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 can 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

These business rules drive the decisions made by the system.

Callback Offer

The system verifies the estimated queue wait time for the type of request before transferring a call. The returned wait time is checked against the system configurable setting:

- If the expected wait time is greater than or equal to this threshold, a message is played before offering callback to the customer. The message can be generic or provide a range of time (best practice) for the estimated wait.
- Estimated Wait Time (EWT) uses one of 3 available options:
  - URS analyzes callback processing speed and pending callbacks while ignoring agent availability.
  - URS analyzes callback processing speed and pending callbacks while accounting for the agents who have historically handled interactions of the Virtual Queue.
  - Query EWT from Stat Server.

The business can configure the thresholds and messages played for various queues.

Register Scheduled Callback

Potential time slots for scheduled callback include these options:

- Business hours and special days for the callback service
- Callers can request to be scheduled in time slots of 15, 30, or 60 minutes.
- Maximum number of connection requests per time slot (the number will be the same for all slots).

Callback

Configurable voice prompts for announcements / treatments for the callback:

- Voice prompt in case the callback is answered by an automated answering machine
- Announcement once the customer is connected
- Treatment while waiting for the agent to be connected
- Announcement in case no agent could be connected to the call after a certain timeout
- It is possible to assign a priority to callback requests. This is important in case this use case is used in combination with other inbound media types (such as inbound calls or e-mail). All callback requests will have the same priority.

These parameters are configurable for each type of request. The type of request is determined by the point in the IVR where transition from self-service to assisted service is required. It is defined by the Speech Application using this callback functionality.
Distribution Logic

Distributing transfer calls to agents

This functionality is handled by one of the prerequisite use cases, which transfers the call to an existing queue for inbound voice routing.

Distributing callback requests to agents

The minimum functionality for distributing a callback generated from the IVR to agents includes:

- Routing of callback requests to agent based on agent 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.
- RONA (Redirect On No Answer).
- In combination with other use cases, blending with other media types is supported, including configuration of capacity rules.
- After configurable timeouts, the routing target can be expanded based on skill level. Upper and lower limits of skill levels can be configured by target.

User Interface & Reporting?

Agent UI

Full inbound Voice Call handling features:

- Call controls
- Callback UI

Callback interface includes:

- Display of Type of Request, User ID, User First Name, User Last Name, User phone number, Language (as provided by the voice application).
- Disposition Codes to classify call and call outcome for reporting purposes.

Reporting

Real-time Reporting

Callback-related reporting

Minimum functionality includes:

- Information on entered and distributed callback requests for distribution. Callbacks entered counts those scheduled callbacks whose scheduled time has arrived and which have been entered into the queue for distribution to an agent.
- The information is available per type of request.
Historical Reporting

Leverage standard out of the box Call Back reports in CX Insights.

Use **Callback Summary Report** for detailed information about callbacks that were processed by the contact center, allowing you to analyse callback performance based on nearly thirty metrics, including:

- Total number of accepted, declined, attempted, connected, cancelled, abandoned, and successful callbacks.
- Percentages of callbacks that were successful, unsuccessful, declined, or connected.
- Savings resulting from callbacks, including the total amount time and money saved and the average time and money saved per callback.
- The number of attempts made to complete callbacks, the time customers spent waiting for an agent, and time customers waited before abandoning a call.

Use **Callback Detail Report** for detailed information about callbacks that were processed by the contact center, allowing you to analyse callback performance based on nearly 30 metrics. Use this report to view a detailed picture of how Callback is used in your contact center, including information about the volume of callback calls, success rates, resulting savings, and customer wait times.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
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<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td><strong>Inbound</strong></td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>- Genesys Call Routing (CE01)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Genesys Personalized Routing (CE02)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

General Assumptions

**Preconditions**

This use case contains only the functionality described above, which can be integrated with existing voice (self-service) applications.
Implementation of this use case requires the following Genesys components:

- Outbound CPD: Genesys SIP & Media Server
- Agent desktop: Workspace Desktop
- Real-time reporting: Pulse
- Historical reporting: Genesys Infomart and Interactive Insights
- Other components:
  - CIM Platform
  - Orchestration Server (ORS)
  - Genesys Mobile Services (GMS)
  - Resource Manager
- No integration with third-party systems
- Genesys Voice Platform is mandatory only for speech recognition (ASR) or text-to-speech (TTS) in the IVR.

Related Documentation

Workspace Desktop Edition Callback

- Callback
- Handling Callback Interactions

Document Version

- Version v 1.1.5 last updated July 12, 2021
Genesys Click-to-Call (CE21) for Genesys Engage on premises

Enable click-to-call from your website or app to improve service and conversions

What's the challenge?

When customers need more information while on your website or mobile app, they want to speak with a well-informed individual who can provide real-time assistance. Having to search for numbers and take steps back when connected to a sales representative results in lost sales, lower customer experience scores and makes them less likely to buy.

What's the solution?

Connect your customer to the help they need from within the web site or mobile app, making it easy to obtain service, buy and improve campaign results. By using skills-based routing and context, calls can be intelligently routed to the individual best equipped to help. Create a seamless experience to improve revenue and brand loyalty.

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
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  • 5.1 Agent UI
Genesys Click-to-Call (CE21) for Genesys Engage on premises

- 5.2 Reporting
- 6 Customer-facing Considerations
  - 6.1 Interdependencies
  - 6.2 Document Version
Use Case Overview

Story and Business Context

Customers or prospects often begin their customer service or sales journey on a company's website before placing a call. By presenting each website visitor with a dynamically-generated phone number and optionally an access code, you can use contextual information from the website visit such as the current web page, cookies, and/or customer information for routing and reporting purposes, and make it available to the employee who handles the call.

Where the call is made from a mobile device, information about the device location can also be used to personalize the treatment of the call and display the caller's location to the agent on a map, for example to guide a customer to a local branch or store.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Customer Experience</td>
<td>Provide a more customer-friendly experience that requires less effort. Hot prospects can bypass IVR menus to be routed directly to the best-fit sales reps, who can use the context of website visits to provide a better customer experience.</td>
</tr>
<tr>
<td>Improved First Contact Resolution</td>
<td>Connect the customer to the best-skilled agent to improve first contact resolution.</td>
</tr>
<tr>
<td>Increased Revenue</td>
<td>Direct interactions to revenue-generating activities. Context from website visits is used to prioritize sales-related calls and route them to the reps best suited to handling them.</td>
</tr>
<tr>
<td>Reduced Handle Time</td>
<td>Customers experience reduced handle time through callback as agents receive associated interaction context. Context from website visits reduces handle time for employees and allows them to focus attention on the prospect.</td>
</tr>
</tbody>
</table>

Summary

Customers or company website visitors on desktop and mobile devices are presented with a dynamically-generated phone number. When a call is received on one of these phone numbers, the system retrieves context information from the website visit for use in routing and reporting on the call, and to provide context to the employee who handles the call. Where the website visit originates on a mobile device, the location of the device can also be used in routing and reporting, and the device location can be displayed on a map for the sales rep.
This use case enables a company to offer its customers a specific phone number to call, which provides routing to the best agent based on the context of their request. This “click-to-call” capability applies only when the customer manually dials the number or is prompted to click-to-dial on a mobile phone. In other words, no media transport such as WebRTC is provided as part of this use case.

Use Case Definition

Business Flow

(1) Business Flow - Website

The following flows describe the use case from the perspective of the main actors, such as a user or customer and a contact center agent, the first a request from a website, the second a request from a mobile application.
Business Flow Description

1. A customer is browsing the company's website or mobile site and requires help. The customer decides to call the contact center and clicks the "ClickToCall" button. Optionally, the customer can click a Channel Selector Widget that shows available channels. If Estimated Wait Time is above the configurable threshold, the ClickToCall button is not accessible.

2. ClickToCall Widget displays the Estimated Wait Time, and the customer is prompted to enter their phone number (mandatory) and optional contact attributes such as Name and Email.

3. The website retrieves a dynamic phone number related to the current web page and displays that to the customer.

4. The customer manually dials the number (or could be prompted to dial the number using click-to-call in a mobile browser), and a call into the contact center is established.

5. Depending on the configured method for matching the interaction, one of the following occurs:
   • DNIS Pool: The user is placed into a queue.
   • Access Code: The website displays an access code and Genesys prompts the caller to enter the access code while on the phone call. If the customer does not enter the correct code after multiple attempts, a corresponding message is played and the call is disconnected. Note: this approach has licensing and development requirements.

6. The call is queued within the Genesys system according to the distribution logic described below and delivered to agents with the skill corresponding to the requested subject.
   • If the agent accepts the call, the call is established and the following information is displayed in the agent desktop: Subject based on DNIS, Customer ID, First Name, and Last Name (as available).
   • If the agent does not accept the call, the call is sent back to the queue and the agent is set to not ready (RONA – redirect on no answer).
   • After the call is finished, the agent sets a disposition code to record the call outcome for reporting purposes.
Business Flow

(2) Business Flow – Mobile App

This flow assumes that the user has activated geo-location and push notifications on his smartphone for the company’s app.
1. A customer is browsing the company's mobile application and requires help. The customer decides to call the contact center and clicks the "ClickToCall" button. The mobile application and related functionality is not within the scope of this use case, but will be provided by the company. Genesys can provide sample applications for iOS and Android.

2. The application retrieves the expected wait time for an agent with skills corresponding to the page and determines whether the time is within the acceptable threshold. If the wait time is above the configured threshold, the app informs the customer and offers to notify him via push notification once an agent becomes available. For customers who do not have push notifications enabled, it is recommended to offer them the ability to activate push notifications for improved service. This functionality is within the application logic and not provided by Genesys.

   - If the customer does not want to wait to be notified, the call to the contact center is established from his mobile device.
   - If the customer agrees to be notified, a push notification is sent to the customer when an agent becomes available. If the customer declines the push notification, the flow ends.

3. The mobile app retrieves the customer details, then establishes a call from the customer’s mobile device to the contact center.

4. The call is queued within the Genesys system according to the distribution logic described below and delivered to an agent with the skill corresponding to the requested subject.

   - If the agent accepts the call, the call is established, and the following information is displayed in the agent desktop: Subject based on DNIS, Customer ID, First Name, and Last Name (as available), plus a new tab for Mobile Details, including a map with the customer's current location.

   - If the agent does not accept the call, the call is sent back to the queue and the agent is set to not ready (RONA – redirect on no answer).
5. After the call is finished, the agent sets a disposition code to record the call outcome for reporting purposes.

Business and Distribution Logic

Business Logic

Assign skill based on subject

The agent skill required for a specific call depends on the call origination. Up to four subjects are standard; any additions require customization. This logic needs to be defined based on the DNIS number for incoming interactions.

Assign priority based on subject

Different priorities can be assigned for different subjects. Three priority values are defined per subject based on the status of the call (Initial, Overflow, or RONA).

Distribution Logic

The following lists the minimum requirements for distributing a call generated from the website to agents:

- Skill-based routing
- RONA (redirect on no answer)
- Call flow logic: Up to three expanding targets with configurable timeout based on skill level. Optionally, one external overflow number outside the control of Genesys can be configured; however, in this case the call context is lost. The timeouts, skill level, or external numbers in this call flow logic are configurable per subject (four are included as standard).

See additional technical information on this use case in the Genesys Mobile Engagement help.

User Interface & Reporting?

Agent UI

The following lists the minimum functionality for the agent interface:

- Configuration of Not Ready reason codes (such as Admin Work, Lunch, Meeting, Pause, RONA, Training). Current Genesys customers can reuse the existing Not Ready reason codes.
- Display of Subject, Customer ID, First Name, Last Name (as available from the website).
- Dedicated tab for Mobile Details, current address, and Google map (if available) – for mobile app
Reporting

Real-time Reporting

Leverage standard reporting for voice in Pulse for reporting on calls generated via Genesys Mobile Engagement. Each subject is available as a dimension in the relevant reports.

Historical Reporting

Leverage standard out-of-the-box callback reports in CX Insights. Use **Callback Summary Report** for detailed information about callbacks that were processed by the contact center, allowing you to analyze callback performance based on nearly thirty metrics, including:

- Total number of accepted, declined, attempted, connected, cancelled, abandoned, and successful callbacks.
- Percentages of callbacks that were successful, unsuccessful, declined, or connected.
- Savings resulting from callbacks, including the total amount time and money saved and the average time and money saved per callback.
- The number of attempts made to complete callbacks, the time customers spent waiting for an agent, and time customers waited before abandoning a call.

Use **Callback Detail Report** for detailed information about callbacks that were processed by the contact center, allowing you to analyze callback performance based on nearly 30 metrics. Use this report to view a detailed picture of how Callback is used in your contact center, including information about the volume of callback calls, success rates, resulting savings, and customer wait times.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>

General Assumptions

This use case makes the following assumptions:

- All inbound voice calls are routed via Genesys.
- Workspace Desktop Edition or Workspace Web Edition are used as the agent desktop.
Mobile App-Specific

The customer is responsible for:

- Providing geo-location information from the app to the Genesys Mobile Services API.
- Securing a subscription to the Google API, which is necessary for Google to support every agent getting a screen pop with a Google Map in this way.
- Supplying the push provider configuration as well as Apple Push Notification Service (APNS) and Google's Firebase Cloud Messaging (FCM) certificates and credentials for push notifications.

Customer Responsibilities

- The customer is responsible for all aspects of the website or mobile app, including development of the logic and the integration with Genesys.
- Pulse is used for real-time reporting.
- Genesys Infomart and Interactive Insights are used for historical reporting.
- No integration with third-party systems.
- Customers need to update/provide scripting to make REST calls into GMS through the web page associated with click-to-call feature.

Mobile App-Specific

The customer is responsible for:

- Providing geo-location information from the app to the Genesys Mobile Services API.
- Securing a subscription to the Google API, which is necessary for Google to support every agent getting a screen pop with a Google Map in this way.
- Supplying the push provider configuration as well as Apple Push Notification Service (APNS) and Google's Firebase Cloud Messaging (FCM) certificates and credentials for push notifications.

Document Version

- Version ver 1.1.2 last updated July 12, 2021
Genesys Predictive Routing for Sales (SL06) for Genesys Engage on premises

Important
This use case is based on Genesys Predictive Routing for Customer Service (BO06) for Genesys Engage on-premises. The capabilities described in this use case are under shipping control. Contact your Genesys representative for additional details.

Place revenue generation at the center of your routing decisions by using AI to match each customer opportunity with the best agent

What's the challenge?
Your existing routing strategy doesn't use machine learning to adapt to the changing patterns of interactions and optimize for sales conversions. You want customers to speak with a rep who can fulfill their need quickly and is predicted best to increase revenue, based on customer journey. Don't let your CX scores suffer!

What's the solution?
Create a differentiated experience by connecting customers with your best-fit sales reps. Genesys Predictive Routing provides the finest grain matching between sales reps and customers and appropriately routes the interaction on the customer's preferred channel.

Other offerings:
Genesys Engage cloud

Contents

- 1 What's the challenge?
- 2 What's the solution?
- 3 Use Case Overview
  - 3.1 Story and Business Context
Genesys Predictive Routing for Sales (SL06) for Genesys Engage on premises

- 3.2 Use Case Benefits*
- 3.3 Summary

- 4 Use Case Definition
  - 4.1 Business Flow
  - 4.2 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 Data Loader
  - 7.2 Routing and Reporting integrations
  - 7.3 Model performance
  - 7.4 Document Version
Use Case Overview

Story and Business Context

Business leaders want to improve their business Key Performance Indicators (KPI), leverage the innovation in Artificial Intelligence and drive business decisions with the abundance of data and context available in their business. Predictive Routing uses machine learning to support optimization of Sales KPIs.

A Sales KPI is a metric measuring the sales outcome of an interaction, in contrast to Service KPIs, which measure a Customer Experience or efficiency outcome. Sales KPIs can be a sales conversion rate, a sales revenue amount, a retention rate, a collection promise to pay. This use case focuses on improving revenue for inbound voice calls, but can also be extended to other sales-related KPIs. The impacts of choosing another KPI or another channel type are documented in this use case wherever applicable.

Predictive Routing also applies to optimize Services KPIs. See Genesys Predictive Routing for Customer Service (BO06) for Genesys Engage on-premises.

Traditional routing is designed to match customers to agents through skills-based or group-based logic rather than improving KPI. Unlike traditional routing, Predictive Routing uses machine learning to detect patterns in historical data to build a predictive model. This model improves KPIs by ranking agents before making the match with customers. This model also addresses the operational challenges that occur in understaffing and overstaffing scenarios while balancing the service level with improving KPI.

Predictive Routing has built-in A/B Testing to demonstrate the uplift of the KPI provided through use of machine learning. Predictive Routing leverages a variety of Genesys or third party data sources in order to build high quality predictors.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Customer Experience</td>
<td>Routing prospects to the sales reps best able to handle their sales request improves the customer experience.</td>
</tr>
<tr>
<td>Improved Employee Satisfaction</td>
<td>Increased sales success leads directly to improved satisfaction for sales reps.</td>
</tr>
<tr>
<td>Increased Revenue</td>
<td>Machine learning-based matching of sales reps to prospects based on sales value directly increases revenue.</td>
</tr>
<tr>
<td>Reduced Customer Churn</td>
<td>Predictive Routing identifies the best agent for each customer interaction, reducing the likelihood of customer churn to protect revenues.</td>
</tr>
</tbody>
</table>
Summary

Consider a retail bank that wants to upsell credit cards to its existing customers. Depending on the customer attributes (such as income), the bank wants to maximize both the conversion rate and the credit limit that the customer accepts, resulting in a higher overall revenue. This use case is based on a measure of sales revenue driven from a Sales reporting application (such as CRM).

The underlying premise of this use case is that a customer interaction is associated to a credit card offer, either from the explicit customer intention from IVR, web, or mobile or from a business rule such as next best action. Next best action is out of scope of this use case.

The Contact Center Manager or Business owner wants to increase overall revenue generated per agent. The Predictive Routing solution can help with achieving this objective.

Predictive Routing:

• Uses machine learning, a subset of Artificial Intelligence, to compare feedback of the actual outcome with the predicted outcome, helping to improve future agent-to-customer matches.

• Ranks agents predicted to maximize the expected revenue per interaction.

• Provides the finest grain match of customer contact with agent to help maximize revenue per agent. Provides an uplift on revenue using continuous learning to rank the expected revenue for agents servicing customers.

The direct result is that the average revenue per interaction increases. Predictive Routing usually also influences adjacent service KPIs like first contact sale, CSAT or NPS, handle time, and transfers. It is a common best practice to monitor all Sales KPIs and adjacent Service Levels to evaluate all impacts (out of scope of this use case).

Use Case Definition

Business Flow

Predictive Routing for Sales

This business flow shows the use case from the perspective of the customer and agent.
Business Flow Description

1. The customer contacts the company using the inbound voice channel. This inbound interaction can be the result of a proactive rule on a web or mobile application.

2. One of the Inbound use cases for the corresponding media type handles the interaction and captures interaction context data. The exact data captured depends on the interaction and engagement type.

3. Based on the interaction context, Genesys selects an initial group of agents with the required skill(s) as possible routing targets to handle the interaction.

4. Predictive Routing calculates the scores of the agents in the target group using a machine learning model that takes into account the agents’ historic performance on similar interactions.

5. When there are multiple agents available, Genesys attempts to route the interaction to the available agent with a highest score.

6. If there is an interaction surplus and an agent becomes ready, Genesys selects an interaction from the queue taking into account the priority of each waiting interaction, the score the agent has for each interaction, and the time the interactions were queued.

7. If no agents are available within the configured timeout, the routing strategy expands the potential target pool of agents by reducing the skill requirements and then repeats the target agent selection using Predictive Routing.

8. After dealing with the customer call, the agent disconnects the interaction.

9. The outcome is mapped to Genesys Info Mart attribute (for example, a disposition code or custom key-value pair).

10. Optional: The customer is offered a survey. The answer to the survey is stored in a third-party system.

11. Optional: Outcome data, such as case management closure, is produced and stored by a third-party application.
Business and Distribution Logic

Business Logic

Parameters and Business Rules – Predictive Routing Revenue

**Routing Step 1** The system creates an inbound interaction when a customer voice call begins. This use case supports inbound voice involving Genesys routing. See Use Case Interdependencies for details.

- Precondition: This use case requires one or more use cases handling inbound interactions.

**Routing Step 2**

- The inbound interaction use case identifies the primary intention of the customer (Service Type) and the initial target skill expression is set.
- Any required additional customer or agent profile data available to the interaction in run time can be integrated through a project-based implementation.

**Routing Step 3**

- This step queues the interaction and is designed to cover both agent surplus and customer surplus scenarios. When either one or multiple agents are available (agent surplus scenario), the flow immediately proceeds. Otherwise, Genesys queues the interaction until an agent is available (customer surplus scenario). The system starts to balance the service level with the business KPI through maintaining priority.

**Routing Step 4**

- Once one or more agents are available, the necessary Customer Profile, Interaction Profile, Agent Profile, and predictor information is passed to Predictive Routing as a scoring request. The request is processed by the relevant machine learning model, resulting in a score for each available agent for that interaction. This process caters to both customer surplus and agent surplus scenarios.

**Routing Step 5**

- The rank for each of the interactions against each of the agents is returned to routing to weight the customer-to-agent matching towards the agent(s) that can deliver the highest revenue.
- In an agent surplus scenario, the score of the highest ranked agent will be compared to the configured minimum score threshold. If the agent score exceeds that threshold, the system routes the interaction. If not, then the interaction is held, pending either a higher ranked agent becoming available, or the threshold reducing.
- In a customer surplus scenario, where multiple interactions are waiting when an agent becomes available, the agent’s scores for each waiting interaction are compared to the minimum score threshold. If the agent score exceeds the threshold for at least one interaction, the system routes the highest scoring interaction for that agent. If not, then the agent remains unassigned, pending either a lower scored interaction becoming available, or the threshold reducing.

**Routing Step 6**

- The minimum score threshold is reduced over time according to the pre-configured fallback strategy.
- The checks in Routing Step 5 are repeated regularly until an agent or interaction is identified.
- Normal target expansion, such as relaxing skill level as configured within the underlying distribution strategy, occurs.
• The continual re-prioritization of the interaction also occurs as do any treatments and the queued customer experience.

Routing Step 7

• If at least one of the revenue values is above the threshold, the interaction is routed to the agent with the highest revenue.
• The system delivers the interaction normally, handling any ring on no answer and exception situations (applicable to voice, chat or email) as defined in the underlying use case.
• The customer and the agent are connected.

Routing Step 9

• The outcome of the interaction is captured through the agent desktop or a server-side process. Genesys APIs are invoked automatically or after an agent action to map the outcome to a Genesys interaction attribute: custom attached data or disposition code.
• Info Mart captures this attribute with the Info Mart interaction record.

Routing Step 10

• Optionally, the customer receives a survey (the survey results are not connected with Genesys and are intended to evolve with the survey use cases)
• The survey is completed (optionally) and the outcome is collected and stored by a 3rd-party application.

Routing Step 11

• Optionally, the outcome data is produced and stored by third-party application.

Distribution Logic

The details of the distribution of an interaction to an agent are defined in the underlying inbound use cases. Refer to the preceding flow to understand how Predictive Routing influences the distribution logic.

Predictive Routing provides a routing lever that can be used to control how customer-to-agent matching behaves in customer surplus mode to distribute the interactions based on agent occupancy.

User Interface & Reporting?

Agent UI

This use case does not include specific agent desktop requirements. During the routing phase, data is attached to the interaction that the agent can see.
Reporting

Real-time Reporting

Predictive Routing does not include real-time reports. Operational reports are available in the Predictive Routing UI.

Operational reports include:

- KPI Outcome
- Feature Coverage
- Model Accuracy

Historical Reporting

The historical reports available through GCXI include the following:

- Predictive Routing A/B Testing Report - tracks A/B testing results for Predictive Routing models and predictors.
- Predictive Routing Agent Occupancy Report - tracks Agent Occupancy while Predictive Routing is being used to optimize routing.
- Predictive Routing Daily Queue Statistics Report - tracks KPIs for each Queue while Predictive Routing is being used to optimize routing.
- Predictive Routing Detail Report - provides interaction level detail data about Predictive Routing use and its impact on KPIs.

*A/B reports can be developed from any standard or custom Info Mart data. If the outcomes data is NOT integrated with Info Mart, the creation of A/B reports must be evaluated as a separate effort.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
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<td></td>
<td>Outbound</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Genesys SMS Notification (CE12)</td>
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<td></td>
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</tbody>
</table>
All of the following required:  

<table>
<thead>
<tr>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Genesys Personalized Routing (CE02)</td>
<td>• Genesys Chat Routing (CE18)</td>
</tr>
<tr>
<td>• Genesys Chat Routing (CE18)</td>
<td>• Genesys Social Media Routing (CE19)</td>
</tr>
<tr>
<td>• Genesys Social Media Routing (CE19)</td>
<td></td>
</tr>
</tbody>
</table>

Workforce Engagement

• Genesys Performance Management (EE14)

General Assumptions

• Requires Product Management approval.

• Predictive Routing solution is offered to on-premises customers in a hybrid architecture that incorporates core functionality served from the Genesys Engage Cloud and components deployed in your own environment.

• Predictive Routing is offered as a managed service by Genesys Professional Services, who deal with all aspects of machine-learning model creation and maintenance. A Professional Services package is mandatory for implementation and support of Predictive Routing.

• The standard deployment materials address Inbound voice interactions based on Genesys Info Mart data only.

• Integration of additional data sources, whether Genesys or 3rd-party, requires a dedicated assessment and implementation by Genesys Professional Services.

• Customer must have implemented a use case for one or more channels and have deployed Genesys Info Mart reporting. These use cases populate the data used to build predictors and models, which direct how interactions are routed. Note that the capture and analysis of FCR KPIs is not part of Genesys Info Mart out-of-box statistics and is developed during model creation.

• This use case is for revenue optimization but can be extended to other Sales KPIs.

• Prerequisites: An implemented use case for one or more channels and Genesys Info Mart reporting. These use cases populate the predictors used to direct routing and the data necessary to build the models. This solution cannot use data that is not present.

• The standard deployment materials address Inbound voice interactions only, and Genesys Info Mart data only.

• The capture and analysis of Sales KPIs is not part of Genesys Info Mart out-of-box statistics and is developed during model creation.

• The revenue definition chosen in this use case is illustrative and needs to be adapted for each project.

Note the exceptions where Predictive Routing cannot be integrated listed in the interdependencies section:

• Self-Service use cases
• Outbound preview and agent reservation used for Predictive and Progressive outbound
Customer Responsibilities

- Customer has already optimized traditional routing strategies and processes and wants to achieve further improvements.
- Customer has all compatible versions of URS, IRD, Genesys Info Mart, GCXI, and Pulse; or upgrades have been scoped in to the project plan.
- Customer has the necessary systems and processes in place to track results and measure impact over the life of the model.
- Customer identification is available and stored in Genesys Info Mart.

Related Documentation

Data Loader

Enables you to upload data, including dataset configuration and upload scheduling.

- Deploy Data Loader
- Configure Data Loader to upload data
- Configure Data Loader for Feature Engineering
- Set up data for import

Routing and Reporting integrations

The URS Strategy Subroutines component integrates with your existing Genesys Routing environment. Genesys Reporting produces reports based on KVPs that capture Predictive Routing interaction handling and outcomes.

- Deploy the URS Strategy Subroutines
- Integrate with Genesys Reporting

Model performance

The GPR web application is the user interface that provides reports on feature coverage and model accuracy.
• Monitor trends and performance

Document Version

• Version V 1.1.3 last updated July 12, 2021
Genesys Outbound

Genesys Outbound Use Cases for Genesys Engage on-premises

Sort or search the table to find the use case you need to edit. Click the title link to go to the use case.

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<thead>
<tr>
<th>Use Case</th>
<th>Subtitle</th>
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<tbody>
<tr>
<td>Genesys Outbound Dialer (CE11)</td>
<td>Improve customer communications and increase sales conversion using powerful dialer capabilities</td>
</tr>
<tr>
<td>Genesys SMS Notification (CE12)</td>
<td>Use SMS to notify customers</td>
</tr>
<tr>
<td>Genesys Omnichannel Notifications (CE13)</td>
<td>Use multiple channels to notify customers</td>
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</table>

"-> Genesys Outbound Dialer (CE11) Improve customer communications and increase sales conversion using powerful dialer capabilities"-> Genesys SMS Notification (CE12) Use SMS to notify customers"-> Genesys Omnichannel Notifications (CE13) Use multiple channels to notify customers
Genesys Outbound Dialer (CE11) for Genesys Engage on premises

Improve customer communications and increase sales conversion using powerful dialer capabilities

What's the challenge?

Dialing for sales outreach is a hard job that requires specialized skills. Low agent utilization due to sub-par dialers, manual dialing, lack of appropriate blending of inbound/outbound result in fewer sales conversions.

What's the solution?

Deliver coordinated outreach and create optimal engagements based on agent availability while reducing costs. Improve the ROI of outbound sales campaigns by efficiently acquiring, up-selling, and winning back customers through automated and assisted calling campaigns by using a powerful dialer for voice calls and IVR for voice messaging.

Other offerings:
Genesys Cloud Genesys Engage cloud PureConnect

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 Flow
• 4.5 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 Workspace Web Edition
  • 7.2 Workspace Desktop Edition
  • 7.3 Document Version
Use Case Overview

Story and Business Context

A company needs to make outbound calls to initiate contact with its customers based on specific business rules for sales, marketing, care, or collections. This use case describes the ability to configure and execute outbound dialing campaigns – both automated and agent-assisted – based on customer-provided contact list(s).

Generating new business and upselling existing customers is a critical part of any business. Sales and marketing organizations are challenged with improving the efficiency of their team members; increasing reach, contact rates, response rates, and revenue; and complying with industry regulations.

**Happier Agents**

- Predictive dialing is used when appropriate to improve agent efficiency and satisfaction by removing low-value calls and wasted time.
- Productive and highly utilized agents have more opportunities to serve customers, close business, and meet their sales quotas.

**Happier Legal Team**

- Compliance and business rules are accurately maintained to ensure enterprise-wide contact strategy adherence.

**Improved Effectiveness / Higher Return on Investment**

- Improved Return on Investment of outbound sales and marketing campaigns (such as telemarketing; upsell/cross-sell; customer win-back; loyalty/promotions) and outbound campaigns.
- Leads are routed to sales agents within seconds (not minutes, hours or days) since "speed to lead" follow up is crucial in many sales environments, driving lead contact rates and conversion rates while decreasing call abandonment rates.
- Sales departments use predictive, progressive, and/or preview dialing modes instead of making manual dials, and outbound call volume is efficiently paced, which results in more sales conversations and increased agent productivity.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Conversion Rates</td>
<td>Conversion rates, cross-sells and up-sell rates will improve through the ability to automatically generate outbound calls and empowering agents with single searchable desktop application that shows customer context.</td>
</tr>
</tbody>
</table>
### Use Case Benefits

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Employee Utilization</td>
<td>Improved agent/employee occupancy by leveraging them for outbound campaigns. Increasing the number of right parties connected through predictive dialing, optimizing the number of agent-handled calls.</td>
</tr>
<tr>
<td>Increased Contact Rate</td>
<td>Automated handling of voicemail and unanswered calls improves right party contacts.</td>
</tr>
<tr>
<td>Reduced Customer Churn</td>
<td>Improved customer experience, and in consequence, a reduction in customer churn allows organizations to save on the costs associated with acquiring new customers plus avoids the loss of future revenue.</td>
</tr>
<tr>
<td>Reduced Volume of Interactions</td>
<td>Reduced volume of interactions by proactively sending communications through outbound channels.</td>
</tr>
</tbody>
</table>

### Summary

The Genesys system supports both agent-assisted and automated outbound calling campaigns using dialer and outbound IVR channels. Dialer calls can be made in predictive, progressive, preview (Push/Pull), Outbound IVR modes (Power/Fixed, Predictive, Progressive), or manual mode. 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, contact phone number, and contact reason. Delivery results are recorded in the system to feed into reports.

Sales and lead development reps are manually dialing customers and prospects for sales and marketing purposes, which is expensive and wastes time. Companies are managing communication in silos and don’t have an integrated, outbound dialing campaign. All companies must follow industry regulations and manage for compliance risk.

### Use Case Definition

**Business Flow**

**(1) Business Flow**

The following diagram shows the main flow of the use case:
**Business Flow Description**

1. The administrator or Genesys PS configures a campaign template, dialing profile, session profile, and settings in the Genesys system.

2. The organization prepares a contact list from a third-party system (such as a CRM), then uploads the list using batch upload, the user interface, or FTP list automation capabilities.

3. The Campaign Group begins contacting consumers based on the campaign template, dialing profile, and session profile from step 1, filtering out those contacts that meet the settings criteria defined in the dialing profile.

4a. For Dialer, the dialing mode is configured as Progressive, Predictive (seizing is optional and recommended), or Preview.

- In Preview mode, the agent receives or retrieves a record and the call is initiated by the agent.
- In Progressive mode, the system automatically places the call based on an agent being available for the specific campaign. 1-to-1 is the default for progressive mode. CX Contact also supports a progressive multiplier, 1-to-many.
- In Predictive mode, the system automatically places the call based on the pacing algorithm and expected agent availability.

For each call attempt, there are multiple potential results. For example:

- **Bad Number or No Answer:**
  - In Preview mode, the agent hangs up, and the disposition and the result are written back to the system.
  - In Progressive and Predictive modes, the call disconnects and the result is written back to the system.

- **Answering Machine:**
  - In Preview mode, the agent has the option to leave a message then disposition the call. Based on the call result code the call may be retried later. The result is written back to the system.
• In Progressive and Predictive modes, the call either disconnects, bridges to an agent, or plays a message (based on the Destination DN configured in step 1) and the result is written back to the system.

• Live Party (Call Result = Answered) connect: the agent is connected to the consumer.
  • The consumer can opt out. The agent records this result in the agent desktop and it is written to a system DNC list. Access to this DNC list requires a Care ticket and intervention.
  • The consumer can ask for a callback. The agent records this result in the agent desktop and the callback is scheduled.

• At the end of the call, the agent records a disposition code and the result is written back to the system.
  • Call result status and record type are written to the list.
  • Info Mart and the BI Extract are required for agent disposition results.

4b. For Outbound IVR, there are multiple potential results. For example:

• Bad Number or No Answer - the call disconnects and the result is written back to the Genesys system (Info Mart and Contact List).

• Answering Machine - the call either disconnects or plays a message (based on the configuration chosen in step 1) and the result is written back to the Genesys system.

• Live Party connect - the call plays the Outbound IVR message.
  • The consumer can opt out of future calls, typically done by including “Press 9 to opt out of future calls”.
  • Optionally, the administrator may choose to offer the option to connect to a live agent, typically done by including “Press 2 to connect to a live agent”.
  • If the agent is part of the Genesys environment then calls can predictively be paced to keep the agent busy. Progressive mode is also available in a
default 1-to-1 or progressive multiplier 1-to-many configuration.

• If the agent is external to the Genesys environment, connection can also be achieved by routing to a phone number provided by the company, external to Genesys. In this case pacing is managed with the number of outbound calls in predictive or progressive (recommended) modes. Pacing cannot determine the availability of agents that are not part of the Genesys environment

  • Consideration: Outbound voice trunks have limits and sizing should be considered to enable the proper dialing rate

  • The result is written back to the Genesys system.

5. Call results are written back to the Genesys system and utilized to determine next actions.

6. Depending on the call result, additional contact attempts may be undertaken. If additional contact is required, the contact treatment configured in step 1 will continue at step 3. If no additional contact is required, the contact treatment ends.

Business Flow

(2) Outbound IVR

The following diagram shows the Outbound IVR subflow:
**Business Flow Description** For Outbound IVR, there are multiple resulting scenarios:

- **Bad Number or No Answer** - the call disconnects and the result is written back to the system.
- **Answering Machine** - the call either disconnects or plays a message (based on the chosen configuration in step 1) and the result is written back to the system.
- **Live Party connect** - the call plays the Outbound IVR message.
  - The consumer has the option to opt out of future calls. This is typically done by including “Press 9 to opt out of future calls”.
  - Optionally, the Customer Admin may offer the option to connect to a live agent (based on the chosen configuration). This is typically done by including “Press 2 to connect to a live agent”. This can be achieved by routing to a phone number provided by the company.
- The result is written back to the system.
Business Flow

(3) Dialer

The following diagram shows the Dialer subflow:
Business Flow Description

- For Dialer, the dialing mode is configured as Preview, Progressive, or Predictive.
  - In Preview mode, the agent receives or retrieves a record and initiates the call.
  - In Progressive mode, the system automatically places the call based on an agent being available for the specific campaign.
  - In Predictive mode, the system automatically places the call based on the pacing algorithm and expected agent availability.

- For each call attempt, there are multiple resulting scenarios:
  - Bad Number or No Answer:
    - In Preview mode, the agent hangs up and the result is written back to the system.
    - In Progressive and Predictive modes, the call disconnects and the result is written back to the system.

  - Answering Machine:
    - In Preview mode, the agent has the option to leave a message. Based on the disposition code, the call may be re-tried later. The result is written back to the system.
    - In Progressive and Predictive modes, the call either disconnects or plays a message (based on the configuration chosen in step 1) and the result is written back to the system.

  - Live Party connect - the agent is connected to the consumer.
    - The consumer has the option to opt out. In cloud, the agent records this in the agent desktop and it is written to a suppression list or DNC list in the premise.
    - The consumer has the option to ask for a callback. The agent records this in the agent desktop and the callback is scheduled.
At the end of the call, the agent records a disposition code and the result is written back to the system.

Business Flow

(4) Preview

The following diagram shows the subflow when preview mode is used:
Business Flow Description: Based on the result of the call, additional contact attempts may be undertaken, either:

- in the same channel, or
- in another channel (Cloud only)

This is configured in the campaign settings in step 1.
Business and Distribution Logic

Business Logic

Parameters and Business Rules

BL1:

Contact Records – Batch Upload

Contact records are batch uploaded, as configured by the customer administrator or Genesys PS based on the goals of the customer and the source of the contact. There is no limit to the number of contacts.

Channel Type – Dialer or Automated Outbound IVR

Customers can choose which channels to use in their campaigns: Dialer (agent-assisted) or Outbound IVR (automated). Channels are configured by the Customer Admin or Genesys PS prior to the list being uploaded. The Customer identifies the message content (or message template) for automated outbound calls.

Campaign Settings

The customer administrator or Genesys PS can configure various campaign settings: start/stop timing, frequency of contact per consumer, contact strategy, mobile filtering treatments, answering machine delivery options, connect to agent options, and assigned agent group.

Dialer Mode– Predictive, Progressive, Preview

Customers can choose to run dialer campaigns using Preview, Progressive, and/or Predictive modes, configured by the customer administrator or Genesys PS.

Answering Machine Detection

Genesys PS can tune aspects of the configuration such as listening for speech or tones, as well as the length of silence between phrases. Customers can choose whether to disconnect or to play a message when an answering machine is detected.

BL2

Personalization

For Outbound IVR, the message or script may contain personalized information from a third-party or customer database, to be provided by the customer along with the list. The audio file is also provided by the customer.
Distribution Logic

DR1

Outbound IVR - Connect to Agent Option

To enable transfer to an agent, option 1 requires the implementation of Genesys Call Routing (CE01) for Genesys Engage.

Option 2 connects through the customer’s non-Genesys contact center. Calls are routed to a phone number provided by the customer.

User Interface & Reporting?

Agent UI

• Contacts can be added to the Do Not Call (DNC) list by the agent
• The agent can enter a Disposition Code for each call (such as Cross Sell, Need Follow Up, Not Right Skill, Processed, Terminated, Transferred, Up Sell). Disposition Codes are configured by the customer administrator or Genesys PS (included within the corresponding use cases).
• Support for Callback:
  • Personal callback
  • Campaign callback

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:

• Campaign Activity — Displays the activity associated with outbound campaigns.
• Campaign Callback Status — Displays the information related to campaign initiated callbacks.
• Campaign Group Activity — Displays the activity associated with outbound Campaign Groups.
Campaign Group Status — Displays the current state and duration associated with outbound campaign group activity.

See Standard Report Templates for more information.

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 track agent occupancy, routing, handling, and disposition of interactions, and analyze the effectiveness of outbound campaigns and contact lists.

Some of the most relevant reports include:

- **Agent Outbound Campaign Report** — Captures total and average durations of call-handling activities, including Handle Time, Wrap Time, Preview Time, Engage Time, and Hold Time, for agents who participate in outbound campaigns.

- **Campaign Callbacks Summary Report** — Displays a summary of information about callback activity, including the total number of callbacks processed by the contact center, broken down into the total number scheduled, missed, and completed for each day of the reporting period. Focuses in outbound voice-only interactions.

- **Campaign Summary Report** — Summarizes key metrics, such as Accepted and Not Accepted, that illustrate the disposition of contact attempts associated with Outbound campaigns.

- **Contact List Effectiveness Report** — Provides detailed information about the number of contact attempts that were generated by an Outbound campaign.

- **Agent Not Ready Reason Code Report** — Provides an analysis of the amount of the time agents spent in a NotReady state, and can help you to identify the most common reasons given, the longest durations, and the agents who spend the most or least amount of time in the NotReady state.

For more information about the Genesys CX Insights reports, see the Genesys CX Insights 9.0 User’s Guide. Reports most relevant to this use case are found in the Agents, Outbound Contact, and Detail folders.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inbound</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Genesys Call Routing (CE01)</td>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>
General Assumptions

- Campaign Group are assumed to be single-mode only, no escalating between modes. Modes applicable to this use case are:
  - Progressive/Predictive (Dialer)
  - Push/Pull Preview (Dialer)
  - Outbound IVR

- Opt Out/In is assumed to be handled in the following way:
  1. For Outbound IVR calls, where the customer answers, there is an option to opt out of further calls. In some cases, this is required and applicable to local regulatory requirements, and is included as an option. The opt out adds the customer to the DNC list. This opt-out announcement is a recorded audio file.
  2. For Dialer calls, where the customer answers and there is no agent available, there is an option to opt out of further calls. In some cases, this is required and applicable to local regulatory requirements, and is included as an option. The opt out adds the customer to the DNC list.
  3. While handling an outbound interaction, agents can add a customer to the DNC list through agent desktop.

- Workspace Web Edition is the agent desktop.
- Genesys Pulse is used for real-time reporting.
- Any real-time or historical reports beyond the standard reports listed in the document are considered additional work.
- For this use case, the linking of subsequent inbound interactions to previous outbound interactions is not in scope.
- Callbacks may be scheduled by the agent through Workspace Web Edition provided they are currently handling an outbound interaction. An agent cannot schedule a callback while handling an inbound interaction.
- English-only user interface.
- Please see Distribution Logic section for Outbound IVR - Connect to Agent Options and use case prerequisites.

Customer Responsibilities

- Customer provides Genesys with the contact list from their own CRM, marketing, or collections database through a flat file.
- Customer is responsible for recording and providing any required announcements and recordings.
- Compliance is handled by the customer: the customer has acquired proper express consent opt-in from consumers to make Sales & Marketing calls and send automated messages, maintains an auditable list, and honors opt out requests. The contact lists that are loaded into Genesys contain only customers to whom calls can be made according to the corresponding local compliance rules.
- The outbound solution can be configured based on the customer's understanding and direction of compliance with local outbound calling regulations to the location of delivered calls. The customer is responsible for compliance with laws and regulations with respect to outbound calling and automatic dialing. It is recommended that the customer's legal department confirm the organization is in full compliance with these regulations.
- Suppression lists should include customers who have opted out of previous campaigns as well as 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 administrator.

Related Documentation

Workspace Web Edition

Outbound calling campaigns

• Outbound campaigns
• Voice call controls

Workspace Desktop Edition

Outbound calling campaigns

• Outbound campaigns
• Disposition Codes

Document Version

• Version 2.1.3 last updated July 12, 2021
Genesys SMS Notification (CE12) for Genesys Engage on premises

Use SMS to notify 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 Notifications. Customers experience a more satisfying and engaging experience with businesses. And companies reduce operational costs while ensuring important and time-sensitive text alerts are delivered to customers wherever they are.

Other offerings:
Genesys Cloud Genesys Engage cloud

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 and Distribution Logic
• 5 User Interface & Reporting?
• 6 Customer-facing Considerations
  • 6.1 Interdependencies
  • 6.2 Document Version
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 describes the ability to configure and execute 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:

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

Summary

This use case enables companies to proactively send customers notifications using SMS for marketing, care, or collections. 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:

<table>
<thead>
<tr>
<th>Financial Services</th>
<th>Telecom</th>
<th>Healthcare</th>
<th>Utilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>• New customer engagement</td>
<td>• Going over plan alerts</td>
<td>• Appointment reminders</td>
<td>• Service call confirmation</td>
</tr>
<tr>
<td>• Replenish prepaid card reminders</td>
<td>• Payment reminders</td>
<td>• Wellness updates</td>
<td>• Planned downtime</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Use Case Definition

Business Flow

The following diagram shows the main flow of the use case:
Business Flow Description

1. An Admin (or Genesys PS) configures the campaign and interaction strategy in the Genesys System. The organization prepares a contact list for the campaign.

2. The campaign begins contacting consumers based on the campaign strategy set in the previous step.

3. The Genesys system checks each contact/record against the Do Not Call list to filter out consumers who should not be contacted.
   3a. All records flagged with DNC are not sent.
   
3b. Genesys compiles the SMS text from a template using fields provided with the contact list for personalization. Best practice recommends adhering to character limits, though the Genesys aggregation platform supports concatenation for messages exceeding in-country limits (for example, the maximum size in the U.S. is 160 characters).

3c. Genesys system updates contact/record result, which is recorded in the contact list.

3d. The customer receives the message.
Business and Distribution Logic

Business Logic

Contact Records

The customer is responsible for the preparation and loading of calling lists into the outbound solution via Genesys Administrator. The design, development, and usage of any custom method for uploading calling lists into the outbound solution (via API, for example) is the responsibility of the customer.

Campaign Settings

One campaign is configured within the system. Customer Admin or Genesys PS can configure campaign settings such as start/stop timing and interaction design.

Text Message Content Template

One template is used for compiling the SMS message. The wording of the SMS message can be personalized using calling list data.

Distribution Logic

N/A

User Interface & Reporting?

Agent UI

N/A

Reporting

Real-time Reporting

Pulse, a Genesys Administrator Extension (GAX) plug-in application, shows the campaign event, but SMS statistics do not populate.

Reporting for SMS can only be viewed through the calling list. The call_result field is populated with the value "answer", which represents the SMS being sent. There are no additional call_result values to represent an SMS being delivered or not delivered.

Historical Reporting

Similar to real-time reporting, the calling list can be exported to show the SMS records sent. There are no additional call_result values to represent an SMS being delivered or not delivered.
Reporting is very limited and it 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.

<table>
<thead>
<tr>
<th>All of the following required:</th>
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</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>

**General Assumptions**

- The default SMS gateway for sending/receiving SMS messages is the Genesys SMS Aggregation Service. Integration with a third-party SMS aggregation service is a custom implementation for which the customer is responsible.
- Chained records are not supported.
- The customer is responsible for the preparation and loading of contact lists as described in the Business Logic section.
- Pulse is used for real-time reporting.
- Genesys Infomart and Interactive Insights are used for historical reporting.
- Any real-time or historical reports beyond the standard reports listed in the document are considered additional work.
- Opt Out/Opt In is not part of the use case, but is a regulatory requirement to be handled by the customer.

**Customer Responsibilities**

- Customer will provide Genesys with the contact list from their own CRM, marketing, or collections database.
- Compliance is handled by the customer: the customer has a plan for securing express consent from customers (when required) before sending SMS messages, maintains an auditable list, and honors opt-out requests. The contact lists loaded into Genesys contain only customers to whom an SMS message can be sent according to local compliance rules.
- The outbound solution can be configured based on the customer's understanding and direction of compliance with local outbound calling regulations at the site of the installation. The customer is responsible for compliance with laws and regulations with respect to outbound calling and automatic dialing. It is recommended that the customer's legal department confirm that the organization is in full compliance with these regulations.
- SMS message content supports a single language only (Latin-based, no double-byte characters).
- The sender number (dedicated short code, long code, alpha sender ID, or text-enabled toll-free number) is provisioned on the Genesys system. Genesys can provision this for the customer for a fee.
- MMS is not included in the scope of this use case.
- SMS throughput is limited to 1 message per second per server when dealing with long-codes.
N/A

Document Version

- Version v 1.2.5 last updated July 12, 2021
Genesys Omnichannel Notifications (CE13) for Genesys Engage on premises

Use multiple channels to notify customers

What's the challenge?

Providing proactive service updates or reaching a prospect at the right time with a personalized message using a customer’s preferred channel such as SMS, email, or voice can be a difficult business objective to achieve. Relying on manually sent notifications is inefficient and error-prone, and doesn't provide the tools necessary to stay within industry regulations and compliance standards.

What's the solution?

Genesys Omnichannel Notification empowers customers to personalize the information they receive — and define when, where, and how they receive it. As a result, customer satisfaction and loyalty increase because the customer stays informed, while operational costs go down as low-value inbound interactions decrease. Companies are able to develop multi-wave campaigns that use calls, voice messages, emails, and text messages.

Other offerings:
Genesys Engage cloud

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 Flow
• 4.5 Business Flow
• 4.6 Business Flow
• 4.7 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 Workspace Web Edition
  • 7.2 Workspace Desktop Edition
  • 7.3 Document Version
Use Case Overview

Story and Business Context

Generating new business and upselling existing customers is a critical part of any business. Sales and marketing organizations are challenged with improving the efficiency of their team members; increasing reach, contact rates, response rates, and revenue; and complying with industry regulations. According to Forbes, 87% of consumers want to be proactively contacted by companies with relevant information. Many organizations struggle with keeping customers informed in a timely and personalized manner across multiple channels, which is frustrating for customers and costly for companies. Companies are not deflecting avoidable and low-value inbound calls, resulting in higher agent costs and lower customer and employee satisfaction. Channels are being managed in silos because companies don't have an integrated, multi-channel outbound platform. And companies often struggle to stay within industry regulations and manage for compliance risk as it relates to outbound communications. This use case enables companies to implement multi-channel outbound campaigns across voice, SMS, and email to improve the efficiency of their staff while increasing reach, contact rates, response rates, and revenue.

Current State Pain Points

- Inefficient dialing of outbound calls by agents. Inefficient dialing could be an overreliance on agents manually dialing customers or using limited predictive dialers that don't optimally pace outbound call volume or successfully screen out unproductive calls such as voice mails and no-answers.
- Inability to escalate outreach across multiple channels to increase successful contacts, lower costs, and improve the number of payments collected.
- Sales and lead development reps are manually dialing customers and prospects for sales and marketing purposes. Manually dialing customers is expensive and wastes time.
- Companies are managing communication channels in silos and don't have an integrated, multi-channel platform.
- All companies must follow industry regulations and manage for compliance risk.
- Organizations are challenged to proactively contact customers over multiple channels with payment reminders and past-due notifications that results in fewer payments being collected.

Ideal State

- Improved effectiveness and return on investment of outbound sales and marketing campaigns (such as telemarketing; upsell/cross-sell; customer win-back; loyalty/promotions) through increased contact rates, response rates, and close-rates.
- Leads are routed to sales agents within seconds (not minutes, hours, or days). "Speed to lead" follow-up is crucial in many sales environments and it drives lead contact rates and conversion rates while decreasing call abandonment rates.
- Sales departments are using predictive, progressive, and/or preview dialing modes instead of making manual dials and outbound call volume is efficiently paced, which results in more sales conversations and increases agent productivity.
- Bill pay reminders using multiple preferred outbound channels collects more payments from customers, reduces the cost-to-collect and drives high-value inbound calls into the contact center (prompt customers to call with questions or to pay).

Happier Agents
Automated channels are used when appropriate to improve agent efficiency and satisfaction by removing low-value calls and wasted time.

Productive and highly utilized agents have more opportunities to close business and meet their sales quotas.

**Happier Legal Team**

- Compliance and business rules are accurately maintained to ensure enterprise-wide contact strategy adherence.

**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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Employee Utilization</td>
<td>An omnichannel outbound engine improves the number of productive contacts per agent (occupancy) and reduces cost expenditure from under-utilized outbound resources.</td>
</tr>
<tr>
<td>Increased Revenue</td>
<td>Close rates, cross-sells and up-sell rates will improve by generating outbound contact through voice, SMS or email and empowering agents with single searchable desktop application that shows customer context across all channels.</td>
</tr>
<tr>
<td>Reduced Penalties and Fines</td>
<td>Automatic application of business and compliance rules for outbound communications reduces the risk of penalties and fines.</td>
</tr>
<tr>
<td>Reduced Volume of Interactions</td>
<td>Contacting customers proactively via SMS, Email or voice message will reduce the volume of inbound interactions handled by agents.</td>
</tr>
</tbody>
</table>

**Summary**

The Genesys system supports agent-assisted and automated outbound communications across channels including Dialer, Outbound IVR, SMS, and Email. Customers tell Genesys which consumers they want to contact through which channels. Companies can blend contact strategies (cloud only) and escalate outreach attempts from automated to agent-assisted calls. Dialer calls can be made in predictive, progressive, preview, or manual mode. The company contacts the customers based a provided list provided to Genesys. The list contains information on the requested channels and collections rules, that are used to decide how to contact the customer. The customer is offered the option to switch channels based on their need, specific moment, location, etc. 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, phone number or email, and contact reason. Delivery results are recorded in the system to feed into reports.

- Maximize agent productivity / efficiency
  - Automate dialing phone numbers, screen out unproductive calls, and optimize the volume of outbound calls based on predicted agent availability
  - Contact results are captured in the CRM system / collection system to add context to future interactions
- Simplify compliance
• Self-service rules builder (cloud only) that enables business users to adhere with requirements
• Compliance and business rules are taken into accounts and accurately maintained
• Customer opt-in program (cloud only)

• Improve the customer experience
  • Timely, relevant, and context-aware outreach over multiple channels
  • Personalized messages to individual customers with option to self-pay
  • Balance the need to collect payments from customers while protecting the ongoing customer relationship
  • Transparent conversation throughout multiple channels when negotiating with debtor, drive a better conversion

Use Case Definition

Business Flow

(1) The following shows the main flow:
Business Flow Description

1. An Admin (or Genesys PS) configures the campaign strategy and settings in the Genesys System.

2. The organization either prepares a contact list from a third-party system (such as CRM or Collections) or configures their system to utilize the Genesys REST API to insert contact records based on events, using a list or API format defined by Genesys:
   - The contacts are loaded within Genesys by the system administrator.
   - Batch uploads can be manual, via S/FTP or API.

3. The campaign begins contacting consumers based on the campaign strategy set in step 1. 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. Based on the result of the call/message, more contact attempts may be undertaken, either:
   - in the same channel
   - in another channel

   Contact attempts are configured in the campaign settings in step 1.
Business Flow

(2) The following diagram shows the Dialer option of the flow:
**Business Flow Description** For Dialer, the dialing mode is configured as Preview, Progressive, or Predictive.

- In Preview mode, the agent receives or retrieves a record and initiates the call.
- In Progressive mode, the system automatically calls based on an agent being available for the specific campaign.
- In Predictive mode, the system automatically calls based on the pacing algorithm and expected agent availability.

For each call attempt, there are multiple resulting scenarios:

- **Bad Number or No Answer:**
  - In Preview mode, the agent hangs up and the result is written back to the system.
  - In Progressive and Predictive modes, the call disconnects and the result is written back to the system.

- **Answering Machine:**
  - In Preview mode, the agent leaves a message. Based on the disposition code, the call may be retried later. The result is written back to the system.
  - In Progressive and Predictive modes, the call is either disconnected or plays a message (based on the configuration chosen in step 1) and the result is written back to the system.

- **Live parties connect - the agent is connected to the consumer.**
  - The consumer can opt out. The agent records the opt-out request in the agent desktop and it is written to a suppression list.
  - The consumer can ask for a callback. The agent records the callback in the agent desktop and the callback is scheduled.

At the end of the call, the agent records a disposition code and the result is written back to the system.
(3) The following diagram shows the Outbound IVR option of the flow:
**Business Flow Description** For Outbound IVR, there are multiple resulting scenarios:

- **Bad Number or No Answer** - the call disconnects and the result is written back to the system.

- **Answering Machine** - the call disconnects or plays a message (based on the chosen configuration in step 1) and the result is written back to the system.

- **Live parties connect** - the call plays the Outbound IVR message.

The consumer can opt out of future calls. Opt-out is typically done by including “Press 9 to opt out of future calls.”

Optionally, the Customer Admin may choose to offer the option to connect to a live agent (based on the chosen configuration). Connecting to a live agent is typically done by including “Press 2 to connect to a live agent” and can be achieved by routing to a phone number provided by the company.

The result is written back to the system.
(4) The following shows the SMS option of the flow:
**Business Flow Description** For SMS, Genesys compiles the text message from a standard template for the contact list with or without personalization. Customer is responsible for following character limitations per country (Max size is 160 characters in the U.S.). Concatenation is supported for message content that is longer than a single SMS.

- Delivery result, if available, is recorded in the Genesys system
- The consumer may decide to respond to the SMS message. All replies are stored in the Genesys system together with the available metadata from the SMS message to identify the consumer.
  - For a HELP keyword, a standardized help text is sent to the consumer.
  - For a STOP keyword, a standardized 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 pre-defined keyword, the system can either send an automated response or trigger an API push into the customer's system.
  - For an undefined keyword, the system stores the response but it does not reply. As an ADD-ON, the organization may choose to send undefined words to an agent.
Business Flow

(5) The following shows the e-mail option of the flow:
Business Flow Description For Email, the consumer can take various actions after receiving the message:

- Do nothing / delete the message.
- Click the link in the message (optional).
  - The website is hosted by the customer (websites that are hosted by Genesys are not in scope).
- To opt out, click the Unsubscribe link.
  - This action can either be configured to go into a suppression list hosted by Genesys or go to a customer-hosted website for managing subscriptions.
- Reply to the email message with a phone call.
  - Customer could include a 1–800 number to call for more information in the email. To track how many inbound calls an email campaign generates, the customer must assign a unique 1–800 number to each campaign.
- Responses to email campaign are funneled through a unique inbox.
- In all cases, the delivery result is written back to the system.
Business Flow

(6) Outbound Collections Flow:

The actors of the business flow are:

- Collections Agent
- Customer
- Systems
  - Touchpoints (Dialer, Outbound IVR, Email, Text/SMS)
  - CRM / Collections System
  - Payment Processor
  - Genesys Outbound
    - Standalone Cloud
    - CX Contact, OCS, and Proactive Contact (Premise)
  - Admin: Collection system management configuration, Genesys campaign configuration
Business Flow Description

1. Payments / Collections Department loads a list of relevant records to Genesys. Customer (dialer, outbound IVR, email, SMS).
   - **Minimum Mandatory Fields**: Customer Number / Client ID and Devices (phone numbers, e-mail address)
   - **Advanced Fields**: User-Defined fields that may be used for personalization or splitting criteria to assign record to the correct list and channel.

2. A Customer Admin (or Genesys PS) configures the campaign strategy in the Genesys System (see Business Logic section for more detail)
   - Create Campaign: Configure template settings
   - Choose Channel Type: Dialer, Outbound IVR, SMS, and/or Email
   - Choose Dialer Mode (if applicable): Predictive, Progressive, Preview (Push or Pull)
   - Configure Campaign Settings: start/stop timing, frequency of contact per consumer, contact pass strategy by channel, mobile vs. landline filtering treatments, answering machine detection tuning, opt out options, connect to agent options, and assigned agent group

3. Genesys determines the channel on which the customer should be contacted based on selection rule criteria during import.

4. In case the channel is SMS, the system sends an SMS with a payment link to the customer or phone number to call to talk with an agent or make a payment.

5. In case the channel is e-mail, the system sends an e-mail with a payment link to the customer.

6. In case the customer should be contacted via an outbound call, Genesys initiates an outbound call to customer telephone number provided in the contact list. There are three options for this scenario:
   - Immediately connect to a live agent using progressive or predictive dialing modes
   - Present the record to an agent using preview dialing mode
Connect to an automated IVR application

7. If the customer could not be reached, there are multiple response types:
   - Bad #/No Answer: the call disconnects and the result is written back to the system
   - Answering Machine: the call disconnects or plays a message (based on the chosen configuration) and the result is written back to the system. Based on the call result, the outbound campaign can decide on the next step (contact the customer on the same channel again / escalate to another channel through copy_contact treatment to move record to appropriate campaign).

8. Customer is connected to a live agent who can discuss the debt and the payment options. Agent can also send an SMS or email (Step 8).

9. Customer is greeted by an IVR which informs the customer about the outstanding payment and offers:
   1. Transfer to an agent (step 11)
   2. Make a payment using automated system (step 10 if available)
   3. To send an SMS with payment methods (step 14)
   4. To send an email with payment methods (step 15)

10. Customer makes payment using automated IVR application. The automated payment application is not within the scope of this use case. Two options exist:
   - Use custom payment application

11. IVR connects customer to a live agent who can discuss the debt and the payment options.

12. The agent can process the outstanding payment. The call result is stored in the system for reporting purposes. AD2

13. The customer may want to reschedule the call. In this case, the agent initiates a personalized callback for the customer. The callback request is written back to the campaign list, so the callback can be handled at the requested time. AD3
14. The agent / IVR may send an SMS message with a link to a payment system to the customer.

15. The agent / IVR may send an e-mail message with a link to a payment system to the customer.

Business and Distribution Logic

Business Logic

BL1

Contact Records – Batch Uploaded or Added On-Demand

Contact records are either batch uploaded or added on-demand via API. An API integration would be configured by the Customer Admin or Genesys PS based on the goals of the customer and the source of the contact. The integration would be completed before the list is uploaded or contacts are added on-demand. There is no limit on number of contacts.

Channel Type – Dialer, Outbound IVR, SMS, or Email

The customer can choose which channels to use in their campaigns – Dialer (agent-assisted), Outbound IVR, SMS, and/or Email. The channel configuration is done by the Customer Admin or Genesys PS before the list being uploaded. The Customer identifies the message content (or message template) per channel.

Campaign Settings

The customer Admin or Genesys PS can configure various campaign settings: start/stop timing, frequency of contact per consumer, contact pass strategy by channel, mobile vs. landline filtering treatments, answering machine detection tuning, opt-out options, connect to agent options, and assigned agent group.

Dialer Mode - Predictive, Progressive, Preview

The customer can choose to run dialer campaigns using Preview, Progressive, and/or Predictive modes. The modes are configured by the Customer Admin or Genesys PS.

Answering Machine Detection

Genesys PS can tune aspects of the configuration such as listening for speech or tones, and the length of silence between phrases. The customer can choose whether to disconnect or to play a message when an answering machine is detected.
Personalization

For Outbound IVR, SMS, and Email, the content of the message/script may contain personalized information from a third-party or customer database provided by the customer.

Text Message Content Template

One template is used for compiling the SMS and Email messages. The template can be personalized with specific customer-defined fields (such as customer name) from a third-party or customer database provided by the customer.

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

It is possible to configure multiple keywords to detect an opt-out (STOP) or help request. Standard keywords include STOP and HELP and variations including: END, QUIT, CANCEL, UNSUBSCRIBE, OPTOUT, NO, STOPALL, STOP ALL, HLEP, and HLP and variations including the organization's language. A list of keywords that triggers STOP or HELP scenarios is defined with the organization at the beginning of the project.

Distribution Logic

Outbound IVR – Connect to Agent Option

- Option 1 - The interaction is routed to an agent.
- Option 2 - Connect to the customer's contact center that is not running on Genesys. These calls are routed to a phone number provided by the customer.

Outbound SMS – Connect to Agent Option

Incoming SMS (MO) interactions are routed to agents through an agent desktop as needed.
User Interface & Reporting?

Agent UI

- Outbound Campaign calling. The agent must be able to perform the following tasks:
  - Add contacts to the Do Not Call list
  - Enter a Disposition Code for each call (such as: Cross Sell, Need Follow Up, Not Right Skill, Processed, Terminated, Transferred, Up Sell). Disposition codes are configured by the Customer Admin or Genesys PS (included within the corresponding use cases).
- Collections Requirements. The agent must be able to perform the following tasks:
  - Send an SMS/email during an outbound collection campaign call.
  - Access the payment system during an outbound collection campaign call.
  - Reschedule a callback if requested by the customer.
  - Track the Outbound call result (payment done, promise to pay, SMS/email sent, etc.).
  - Access the contact history.

Reporting

Real-time Reporting

Key KPIs related to this use case are:

- Delivery / Reach Rates
- Response Rates
- Number of Inbound Calls

The Genesys system provides extensive analytics and monitoring of campaign statistics, for more Information reference the online documentation.

Collections: In addition to the standard real-time reporting mentioned in the Outbound Dialer Use Case, the main KPI to show are:

- Contact rate
- Payment rate
- Preferred channel used for payment
- Agent efficiency (as measured by talk time vs. idle time)
- Campaign effectiveness

Historical Reporting

Key KPIs related to this use case are:
• Delivery / Reach Rates by Campaign and Trends
• Response Rates by Campaign and Trends
• Customer Satisfaction / NPS Scores
• Number of Inbound Calls

Note: Omnichannel (SMS and email) Outbound Reporting is not available in GI2 and GCXI.

Collections: In addition to the standard historical reporting mentioned in the Outbound Dialer Use Case (based to Campaigns, Calling Lists and Agents) the main KPI to show are:

• Contact rate - for specific campaign or date range
• Payment rate - for specific campaign or date range
• Preferred channel used for payment
• Agent efficiency - for specific campaign or date range, overall and per agent
• Campaign effectiveness - for specific campaign or date range

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Outbound</strong></td>
<td></td>
<td>Digital</td>
<td></td>
</tr>
<tr>
<td>• Genesys Outbound Dialer (CE11)</td>
<td>None</td>
<td>Genesys Email Routing (CE16)</td>
<td>None</td>
</tr>
<tr>
<td>• Genesys SMS Notification (CE12)</td>
<td></td>
<td>Genesys SMS Routing (CE29)</td>
<td></td>
</tr>
<tr>
<td><strong>Inbound</strong></td>
<td></td>
<td>Genesys Call Routing (CE01)</td>
<td></td>
</tr>
</tbody>
</table>
Customer Responsibilities

- The customer provides Genesys with the contact list from their own CRM, marketing, or collections database - either flat file or on-demand trickle-feed.
- The customer is responsible for recording and providing any required announcements and recordings.
- We assume that compliance is handled by the customer: the customer has acquired proper express consent opt-in from consumers to make Sales & Marketing calls and send automated messages, maintains an auditable list, and honors opt-out requests. The contact lists which are loaded into Genesys contain only customers to whom calls can be made according to the corresponding local compliance rules.
- The outbound solution can be configured based on the customer's understanding and direction of compliance with local outbound calling regulations at the site of the installation. The customer is responsible for compliance with laws and regulations about outbound calling and automatic dialing. It is recommended that the customer's legal department validates the organization is in full compliance with these regulations.
- SMS message content supports a single language only (Latin-based, no double-byte characters).
- The sender number (dedicated short code, long code, alpha sender ID, or text-enabled toll-free number) has been provisioned on the Genesys system. Genesys can provision the sender number for the customer for a fee.
- MMS is out of scope.

Related Documentation

Workspace Web Edition

Outbound campaigns, digital media channels, and contact and interaction management.

- Outbound campaign calling
- Contact and interaction history
- email interactions
- SMS interactions

Workspace Desktop Edition

Outbound campaigns, digital media channels, and contact and interaction management.

- Outbound campaign calling
- Contact and interaction history
- email interactions
• SMS interactions
• Blending media into a single conversation
Genesys Self-Service and Automation Use Cases for Genesys Engage on-premises

Sort or search the table to find the use case you need to edit. Click the title link to go to the use case.

<table>
<thead>
<tr>
<th>Use Case</th>
<th>Subtitle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Genesys Customer Authentication (CE07)</td>
<td>Identify and verify customers in your IVR</td>
</tr>
<tr>
<td>Genesys Voice Payment (CE08)</td>
<td>Capture payments in your IVR</td>
</tr>
<tr>
<td>Genesys IVR Personalization (CE09)</td>
<td>Increase self-service by personalizing your IVR</td>
</tr>
<tr>
<td>Genesys Multimodal IVR (CE10)</td>
<td>Present your customers with a visual way to complete or complement voice interactions</td>
</tr>
<tr>
<td>Genesys Knowledge Management (CE28)</td>
<td>Offer FAQs to customers and a knowledge library to employees</td>
</tr>
<tr>
<td>Genesys Chatbots (CE31)</td>
<td>Use chatbots to automate customer conversations and seamlessly hand over to a live agent when needed</td>
</tr>
<tr>
<td>Genesys Voicebots (CE41)</td>
<td>Use voicebots to automate customer conversations and seamlessly hand over to an agent if needed</td>
</tr>
</tbody>
</table>
Genesys Customer Authentication (CE07) for Genesys Engage on premises

Identify and verify customers in your IVR

What's the challenge?

Most IVRs require your customers to manually enter their information each time they call. Customers typically have to supply that information again when they’re connected with an agent or transferred — leading to longer handle times, higher purchase abandonment and poor customer experience scores.

What's the solution?

Cut out time-consuming identification steps with a simple, automated caller ID. Genesys Customer Authentication integrates with your customer database to identify callers by their phone number. This context is passed across channels — so you can identify, verify and proactively greet customers, without repetition.

Link to video

Other offerings:

- 
- 

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 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 Workspace Desktop Edition
  • 7.3 Document Version
Use Case Overview

Story and Business Context

In most IVR applications, customers call into companies, such as their credit card company, bank, or cable company, and must manually identify themselves. If the call goes to an agent, customers normally need to identify themselves again to the agent. This is frustrating and time consuming for callers. IVR systems can and should contain self-service to identify the customer automatically based on their caller ID, and this information should then be used throughout the call flow for progressive identification and verification (ID&V), passed as context to a visual session or passed to an agent. This makes customers feel that they want to do business with the company, as their identity is proactively recognized and maintained. For example, as soon as the call connects, a data dip should be completed to identify the customer based on their caller ID. The IVR application can then configure logic to greet the caller by name, skip identification for new self-services within the same call, or skip identification or verification if they move to a visual IVR.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Containment Rate</td>
<td>Reduce agent handled inbound call volume by improving containment rate through a robust and flexible solution</td>
</tr>
<tr>
<td>Improved Customer Experience</td>
<td>Passing identification and verification from IVR to the agent improves the customer experience.</td>
</tr>
<tr>
<td>Reduced Handle Time</td>
<td>Automated identification and verification in the IVR reduces agent handling time.</td>
</tr>
<tr>
<td>Reduced Interaction Abandonment</td>
<td>Certain self-service tasks require a solid means of authentication. If a caller cannot be adequately identified, the call will likely end up waiting for an agent to be available.</td>
</tr>
</tbody>
</table>

Summary

The IVR system proactively identifies the caller at the beginning of the call. The IVR then asks the caller to identify themselves by entering information to verify their identity. Depending on the business logic configured in the Control Center, the system routes the caller to self-service in the IVR, a main menu, or an agent. If the customer needs to go through another self-service option, the customer's ID&V status persists. This ID&V status also persists if they transfer to a visual IVR and continue their journey there. Finally, if the caller transfers from the IVR to an agent, the system displays the data captured by the IVR to the agent, providing a better experience for both the caller and agent.
Use Case Definition

Business Flow

Figure 1: Example Business Flow
**Business Flow Description**

1. Call is transferred into the application. This self-service module can be integrated into a broader IVR application that answers the call. At some point the application may decide that Identification and Verification of the customer is required and will initiate the flow of this use case. If ID&V is required then the application initiates the flow of this use case. If the customer has already been identified in a previous channel, transaction or step then it skips this flow. If not it continues to step 3. The broader IVR application is not within the scope of this use case.

2. If enabled, Genesys will identify a customer using the Automatic Number Identification (ANI) / Caller Line Identification (CLI).

3. If ANI / CLI are available, Genesys performs a lookup in the company's database to identify the caller.

4. If identification via ANI / CLI is disabled or fails, Genesys will ask for a separate Identifier (e.g. customer ID, account number, tracking number) to identify the customer. This question must require numeric entry. If the customer does not have the necessary information, Genesys asks the customer to press a specific DTMF tone.

5. The customer input is validated against the customer database.
   - If no match is found, the customer is asked for their identifier, up to a maximum of three times after failure. The number of retry attempts is configurable.
   - If the customer is still not be successfully validated, the customer is forwarded to agent assisted service.

6. If a match is found, Genesys asks for additional information validating the caller's identity for security purposes. This question must require numeric entry.
   - Progressive ID&V, i.e.: higher levels of authentication based on customer profile information and/or requested transaction, occurs during self-service depending on the type of interaction.
   - Progressive ID&V is defined in a separate ID&V module and is not within the scope of this use case. The preceding level of
authentication should be configurable by a business user in real time should they wish to re-order authentication questions.

7. Genesys looks up and validates the security information entered by the caller within a third party application. If this validation is not successful, the system asks the customer for security information again, up to a maximum of three times after failure.
   - If the system cannot successfully validate the customer, the system forwards the customer to agent assisted service.

8. Genesys plays a prompt that confirms the validation or informs the customer of the failure.

9. A configuration parameter determines where the caller should be routed to next. The possible options are listed below. However, these are outside the scope of the ID&V use case:
   - Agent assisted service - the result of the identification and verification will be displayed to the agent making both the customer and agent experience better. This functionality requires implementation of the use case.
   - Self service IVR such as transfer funds, make a payment.
   - Progressive ID&V could occur before self-service depending on the type of interaction. This option would be defined in a separate self-service module outside the scope of this use case.
   - IVR main menu for identification of the type of caller request

Business and Distribution Logic

Business Logic

You can define business logic to govern the ID mechanism, next steps, and voice prompts.

Customer identification by ANI / CLI

Step 3 in the flow above can be enabled or disabled depending on specific customer requirements. If this step is disabled, the flow will always ask for a customer identifier (for example customer ID, account number, or tracking number). This parameter can be set per company service line.
Configuration to define the next steps

After Identification and Verification has been performed successfully, the call will be transferred to the next step of the overall callflow. This might be an agent assisted service, a self-service application or an IVR menu. This parameter can be set per company service line.

Progressive ID&V: Configuration to define preceding authentication question(s) - Configuration can be set from within the ID&V module to give the business user control on the order of authentication questions. The configuration of other ID&V modules that contain these questions are out of scope for this use case.

Omnichannel ID&V: Passing of ID&V token - This authentication use case can be configured to pass an ID&V token from IVR to a visual IVR, so a customer can continue their journey on visual IVR if previously identified.

General: Voice Prompts

The customer can flexibly change all voice prompts within this flow.

Distribution Logic

N/A

User Interface & Reporting?

Agent UI

Only available if this use case is used in conjunction with the:

- If the call is transferred to agent-assisted services: The agent will receive an indication whether the customer is
  - Identified and verified
  - Identified only
  - Neither Identified nor verified

Customer identifier and name will be displayed to the agent as well (if available).

Reporting

Real-time Reporting

Users with appropriate permissions are able to follow the interaction journey throughout the IVR. Each step of the IVR process the caller enters (and after, if going to a user or to queue), is identified with time-stamps.

Historical Reporting

Intelligent Automation offers a suite of internal reports details below:
Dashboard

- Application Overview
- System Pulse
- Real-time Graphs

Prebuilt Reports

- Summary
- Calls per Day
- Calls by Time of Day
- Block Results
- Recognition Summary
- Business Task Summary

Customer Journeys

- See what’s important to callers
- Monitor the impact of changes
- Compare customer experience
- Data Extracts (CSV format)
- Call Details
- Business Tasks
- GUI Actions
- Inbound SMS

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

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<td>Inbound</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Genesys Personalized Routing (CE02)</td>
<td></td>
</tr>
</tbody>
</table>
General Assumptions

The use case is supported for Cloud, Premise and Platform as a Service (IVR PaaS).

For IVR PaaS, Genesys Intelligent Automation is deployed on premise and IVR ports are in Genesys Engage cloud. Agents can be enabled in Genesys Engage on-premises or Genesys Engage cloud.

• To support PCI or similar compliance, on-premises environments must be architected and configured accordingly
• Genesys Intelligent Automation is a required sellable item.
• As an additional add-on, ASR can be used for the numeric input (see above) and for the phrase "I don't have it" (and synonyms of this phrase) in the flow above.

Customer Responsibilities

• The company has a database that can be used to identify the customer. This database must provide the appropriate web services
• The company provides access to an application to validate the customer identity
• Company must have a unique identifier for their customers
• Complex alphanumeric inputs (for example, check digits) may require custom grammar development - available as optional add-on.

ASR functionality is an optional add-on service for numeric input (see above) and for the phrase "I don't have it" (and synonyms of this phrase) in the flow above.

Related Documentation

Agent Desktop

Agent Desktop enables agents to handle interactions, view Case Data, and transfer calls.

• Agent Desktop v9
Workspace Desktop Edition

Workspace enables agents to handle interactions, view Case Data, and transfer calls.

- Workspace Desktop Edition Help

Document Version

- Version v 1.1.3 last updated July 12, 2021
Genesys Voice Payment (CE08) for Genesys Engage on premises

Capture payments in your IVR

What's the challenge?

Customers expect convenience and demand data security. They want the option of phone payment with the assurance of cardholder protection. If you don't accept card transactions by phone, you lose money. And if you don't exceed data security standards, you put your customers — and your business — at risk.

What's the solution?

Ensure secure interactions with a PCI-compliant solution that protects credit card data submitted to your automated IVR system or to an agent. Protect against fraud and preserve trust while still providing a flexible customer experience.

Other offerings:
Genesys Cloud Genesys Engage cloud PureConnect

Contents

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  • 5.1 Agent UI
  • 5.2 Reporting

6 Customer-facing Considerations
  • 6.1 Interdependencies
  • 6.2 Document Version
Use Case Overview

Story and Business Context

This functional use case enables companies to use Payment Capture capabilities to provide PCI PA-DSS certified payments out-of-the-box (PCI PA-DSS = Payment Card Industry - Payment Application Data Security Standard). Dynamic treatment is applied so that only relevant questions for the card in question are asked. The use case can be deployed in fully automated or agent-initiated mode.

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:

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<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Customer Experience</td>
<td>Offer customers the option of agent-assisted or fully automated phone payments.</td>
</tr>
<tr>
<td>Increased Revenue</td>
<td>Secure payment capture using IVR enables phone-based sales and collections to increase revenue.</td>
</tr>
<tr>
<td>Reduced Deployment Costs</td>
<td>Proven, PCI PA-DSS certified application reduces deployment time and cost.</td>
</tr>
<tr>
<td>Reduced Interaction Abandonment</td>
<td>Certain self-service tasks require a solid means of authentication. If a caller cannot be adequately identified, the call will likely end up waiting for an agent to be available.</td>
</tr>
<tr>
<td>Reduced Penalties and Fines</td>
<td>Use of an approved application reduces the risk or penalties and fines for non-compliance.</td>
</tr>
</tbody>
</table>

Summary

Provides the ability to quickly add a PA-DSS certified Payment Capture MicroApp** to a call flow to capture payments. The Payment Capture MicroApp integrates with a third-party payment gateway to complete the payment. The application includes automatic card type detection and applies appropriate rules for collection and validation of the card data. Payments can be agent-assisted or fully automated.

- MicroApps provide a range of capabilities whose functionality is both highly focused and task-based, thus enabling users to quickly get in, interact, and get out of it. In the personal and business spheres, end users clearly benefit from an application interface that is tailored to their specific use case.
Use Case Definition

Business Flow

(1) The following flow describes the use case from the perspective of the main actors, especially customers:
Business Flow Description

1. A customer is transferred to the payment application by another IVR application (which is outside of the scope of this use case). The requested payment amount is transferred to the payment application.

2. The system checks whether the Customer has been identified. If not, the customer is routed to a separate application for Identification and verification. This functionality is covered by a separate use case.

3. If identification and verification succeeds, the customer moves to the next step. If not, the customer is transferred to an agent with context.

4. The system determines if the caller is to pay a predefined amount or if the caller is permitted to enter the amount they wish to pay. If the latter, the system then enables the customer to enter a payment amount. The system checks if the entered amount is within allowed values before proceeding. The system can also allow the caller to choose to pay the full amount.

5. A voice prompt is played to ask the customer to enter their card details. The following happens:
   - The customer enters their card number.
   - The system checks if it is a valid card number and what type of card it is (the list of allowed card types is configurable). Finally, depending on the type of card, the customer is requested to provide further details (such as expiration date and CVV code).

6. The system plays back the payment details and asks the caller to confirm so that the payment can be processed. The caller states whether the details entered are correct or incorrect. The option to read back only the last 4 digits of the card number is configurable.

7. If the caller states that the payment details are incorrect, the system asks the caller which of the previously entered information (such as card number or expiration date) was incorrect. Based on the caller’s choice, the system asks for the information again before returning to the confirmation step.

8. If the caller states that the payment details are correct, the system accesses the payment...
gateway or CRM to process the payment. This is either rejected or successful.

9. If rejected, the customer can re-enter their card details until the maximum number of rejections is met, when the Customer is transferred to an agent with context.

10. If the payment is successful, Genesys plays an appropriate announcement to the customer and at this point, dynamic information such as a transaction reference or order number can also be played.

11. The call transfers back and continues in the IVR application. The result of the payment is attached to the call for further processing.

Business Flow

(2) Scenario 2 - Agent Conference
Business Flow Description

1. A customer is transferred to the payment application by conference from an agent with DTMF (Dual Tone Multi Frequency) clamping enabled. The agent is part of the call. The requested payment amount is transferred to the payment application.

2. The system checks whether the customer has been identified. If not, the customer is routed to a separate application for Identification and verification. This functionality is covered by a separate use case.

3. If identification and verification succeeds, the customer moves to the next step. If not, the IVR is removed from the conference, and the customer and agent continue their conversation.

4. The system determines if the caller is to pay a predefined amount or if the caller is permitted to enter the amount they wish to pay. If the latter, the system then enables the customer to enter a payment amount. The system checks if the entered amount is within allowed values before proceeding. The system can also allow the caller to choose to pay the full amount.

5. A voice prompt is played to ask the customer to enter their card details. The following happens:
   - The customer enters their card number.
   - The system checks if it is a valid card number and what type of card it is (the list of allowed card types is configurable). Finally, depending on the type of card, the customer is requested to provide further details (such as expiration date and CVV code).

6. The system plays back the payment details and asks the caller to confirm so that the payment can be processed. The caller states whether the details entered are correct or incorrect. The option to read back only the last 4 digits of the card number must be enabled as the agent is part of the conference.

7. If the caller states that the payment details are incorrect, the system asks the caller which of the previously entered information (such as card number or expiration date) was incorrect. Based on the caller’s choice, the system asks for the information again before returning to the confirmation step.
8. If the caller states that the payment details are correct, the system accesses the payment gateway or CRM to process the payment. This is either rejected or successful.

9. If rejected, the customer can re-enter their card details until the maximum number of rejections is met, then the Customer is transferred to an agent with context.

10. If the payment is successful, Genesys plays an appropriate announcement to the customer and at this point can also play dynamic information such as a transaction reference or order number.

11. The IVR is removed from the conference and the customer and agent continue their conversation. The result of the payment is attached to the call for further processing.

Business and Distribution Logic

Business Logic

This chapter describes the business rules that drive the decisions that the Genesys system makes within the Payment Capture application, such as how the business rules are configured.

Parameters to be passed to the payment application

The payment application requires the following parameters:

1. Customer or Account Identifier (mandatory)
2. Outstanding Balance or Payment Amount (mandatory)
3. Payment Merchant ID (optional)
4. Payment Reference (optional)
5. Call type Conference (required if payment attempt is agent-assisted)

Configuration Settings

The following parameters are configurable within the system:

- The minimum payment amount (required). For payment requests below this amount, there is an error flow where the customer is asked to enter the amount they want to pay.
- The maximum number of declined payments allowed before exiting the flow.
- The result to return when the maximum attempts are reached, possibly to send the call to an agent or initiate some other handling.
- The types of cards that are allowed for payment (such as Amex and Visa)
Distribution Logic
N/A

User Interface & Reporting?

Agent UI
N/A

Reporting

Real-time Reporting

Available KPIs:

- Number of times the payment application was entered
- Number of times a payment was successful
- Number of times a payment was unsuccessful
- Number of times payment was attempted
- Number of times a caller hung up within the payment application
- Average duration of task per outcome

Historical Reporting

Intelligent Automation offers a suite of internal reports details below:

Dashboard

- Application Overview
- System Pulse
- Real-time Graphs

Prebuilt Reports

- Summary
- Calls per Day
- Calls by Time of Day
- Block Results
- Recognition Summary
Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

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<td></td>
<td></td>
</tr>
<tr>
<td>• Genesys Customer Authentication (CE07)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Genesys Call Routing (CE01)</td>
<td></td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>• Genesys Personalized Routing (CE02)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

General Assumptions

- The use case is supported for Cloud, Premise and Platform as a Service (IVR PaaS).

- For IVR PaaS, Genesys Intelligent Automation is deployed on premise and IVR ports are in Genesys Engage cloud. Agents can be enabled in Genesys Engage on-premises or Genesys Engage cloud.

- The integration between Genesys Intelligent Automation and the payment gateway (or CRM or other system used to process the payment) is provided by the customer/partner. This is an XML over HTTP(S) interface which typically requires a small translation later between GAAP and the backend systems in order to ensure the required data contract is met.
• Genesys Intelligent Automation is a required sellable item.
• Certification of the full PCI environment is outside the scope of this use case.
• Audio prompts:
  • Genesys recommends that pre-recorded prompt recordings be used for any dynamic playback of information such as payment amounts, dates, or order numbers, as this provides a higher quality caller experience than using text-to-speech.
  • Sellable item Concatenated Prompts Recordings is the preferred option.
  • TTS is optional for playback of prompts.
• Input modes:
  • If the agent initiates payment capture by conferencing the customer with the IVR, customer inputs are DTMF only. DTMF clamping is used to prevent the agent from hearing DTMF inputs.
  • If payment capture is initiated from IVR, customer inputs can be voice or DTMF.

Document Version
• Version v 1.1.5 last updated July 12, 2021
Genesys IVR Personalization (CE09) for Genesys Engage on premises

Increase self-service by personalizing your IVR

What's the challenge?

When your customers call in to service themselves, they want to get off the phone as soon as possible. Giving customers options that confuse more than help slows the process, causes frustration and leads to more agent interactions.

What's the solution?

Deliver a great experience and increase self service adoption by helping customers navigate the IVR quickly. Genesys IVR Personalization tailors messages, menus and treatments based on who the customer is and why they are calling, also taking capacity into account.

Other offerings:

Genesys Cloud PureConnect

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 and Distribution Logic
• 5 User Interface & Reporting?
• 5.1 Agent UI
• 5.2 Reporting

• 6 Customer-facing Considerations
  • 6.1 Interdependencies
  • 6.2 Document Version
Use Case Overview

Story and Business Context

IVRs have historically been designed to maximize the containment of callers to reduce staffing costs associated with increased call volume, often without a careful assessment of customer experience. This has led to deep and complex IVR menu trees that frustrate customers, create an undesirable customer experience, and result in high opt-out rates. IVR personalization addresses the following:

- Simplifies the menu structure (both depth and within a single menu)
- Presents meaningful options to the caller
- Increases containment and use of the IVR through ease of use and relevance of options
- Increases customer satisfaction through simpler, more relevant navigation and completion of tasks

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Containment Rate</td>
<td>Help customers service themselves quickly and easily so they don’t want to speak to an agent.</td>
</tr>
<tr>
<td>Improved Customer Experience</td>
<td>Personalized menus and prompts simplify the IVR, make it more effective for customers and make them feel more valued.</td>
</tr>
<tr>
<td>Improved First Contact Resolution</td>
<td>Offering the most appropriate options to each customer increases first contact resolution.</td>
</tr>
<tr>
<td>Reduced Handle Time</td>
<td>The time required to address a customer inquiry or request is optimized.</td>
</tr>
<tr>
<td>Reduced Interaction Abandonment</td>
<td>Reduce number of callers abandoning while in queue by enabling easier to use IVR.</td>
</tr>
</tbody>
</table>

Summary

This functional use case offers several types of personalization:

- Proactively play status or balance before presenting any options. For example, “Your next order is due to be delivered on Thursday.”
- Proactively offer most likely call reason. For example, “Are you calling about the loan application you have in progress?”
- Personalize menu options. For example, play a mortgage option in the menu only if they have a mortgage, or present a promotion option only if they are eligible.
Persona-based Personalization is the ability to change the wording of input and messages based on language or customer context such as age.

These types of personalization can lead to an increase in self-service rates. They can also improve customer experience by shortening the time spent on the IVR or bypassing self-service based on the context of the customer’s call. The context to drive this personalization can be retrieved from native or from third-party data sources. Personalized IVR can also update customer context so that this information is available across other channels.

Use Case Definition

Business Flow

The diagram outlines the personalized call flow:
Business Flow Description

1. A customer calls a service line of the company.

2. Customer progresses through routing strategy. The routing strategy is not in scope of this use case.

3. An IVR application answers the call. The full IVR application is not within the scope of this use case, but the functionality in this use case can be used as a module to enhance the IVR application with personalization options.

4. If the customer needs to be identified and authenticated (verified), the ID&V interaction uses one or multiple identifiers (such as Customer ID, Account Number, or similar). Customer identification may also be verified by a PIN, if required. This functionality is offered by another use case provided by Genesys, which is leveraged in this scenario. The Identification and verification functionality itself is not within the scope of this use case.

5. Using the customer identifier (for example, ANI), Genesys can retrieve customer context information from a third-party system or from Genesys context services (optional).

6. The personalized treatment is decided based on submitting context to business rules natively, using third-party systems or using internal data. Personalized treatments include:
   - Playing a personalized message to the customer. The caller may hang up at this point if they have all the information they require. For example: The caller is identified to be in a region with a power outage. An announcement can be played to inform the caller of the status.
   - Proactively playing status or balance before presenting any options. For example: "Your next order is due to be delivered on Thursday."
   - Proactively offering the most likely call reason. For example: "Are you calling about the loan application you have in progress?"
   - Personalizing menu options (dynamic menu). For example: "Only play mortgage option in the menu only if they have a mortgage or present an option if they are eligible."
7. Sending the customer to:
   - An agent with updated context.
   - A self-service application (not in scope).
   - A generic menu, if the caller does not fit any of the configured personalization options. In this case, the caller continues to the main menu of the IVR application.
   - Since this use case is about personalization, the development of this main menu is out of scope.

Business and Distribution Logic

Business Logic

This use case is supported by industry templates that contain examples of personalized treatments using built-in variables or external variables. See below for a sample list of these variables. Personalized treatments are confirmed during design.

Built-in Variables

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dialed Number</td>
<td>The number the caller dialed.</td>
</tr>
<tr>
<td>CLI</td>
<td>Calling Line Identifier - The number the caller is dialling from (also known as Automatic Number Identification - ANI).</td>
</tr>
<tr>
<td>Recent Failure Flag</td>
<td>Indicates if a call has failed. When a call fails, such as due to technical error, a flag is set in the database to True or False. This parameter can only use the True or False logic.</td>
</tr>
<tr>
<td>Random Percentage</td>
<td>Used for A/B testing. A specified percentage of calls can be randomly selected to be sent down a new leg of the callflow. The results of this testing can be monitored using the reporting.</td>
</tr>
<tr>
<td>Last Result</td>
<td>The outcome of the last callflow block. For example, for a menu this would be the menu choice or for a self-service task it could indicate if it was completed successfully. This value will be set by the speech application.</td>
</tr>
<tr>
<td>Number of Calls Today</td>
<td>The number of times the customer has called into this callflow today.</td>
</tr>
<tr>
<td>Number of Calls in Last Week</td>
<td>The number of times the customer has called into this callflow in the last week.</td>
</tr>
<tr>
<td>Number of Calls in Last 2 Weeks</td>
<td>The number of times the customer has called into this callflow in the last 2 weeks.</td>
</tr>
</tbody>
</table>
Number of Calls in Last 4 Weeks

The number of times the customer has called into this callflow in the last 4 weeks.

Date

A specified date

Time

A specified time of day.

Date and Time

A specified date and time of that particular day.

Current Day of the Week

This parameter allows you to select a day of the week. No further logic is required.

Opening Hours Rule

This parameter allows you to select whether an opening hours rule is currently open or closed. No further logic is required.

Variable

Variables can be populated with context from within the same dialog or by integrating with other Genesys or third-party systems.

External Variables

In addition to the built-in variables described in the previous section, the rules can use additional customer variables:

- Retrieved from a third-party system via a web-service.
- Set by the IVR application that leverages this use case. This can for example be based on caller input.

Business Rules

Business rules are applied to the variables to see how they compare to the value. The outcome of the business rule determines which personalized treatment applies. Business rules consist of logical comparisons of one variable with predefined values. Examples include:

- Variable `customer segment` is equal to VIP
- Current Date is equal to 24.12.2020
- Number of calls in the last week is greater than 3

Multiple logical conditions can be combined within one business rule so that the treatment is applied only if all conditions are met. There is also the option to apply the treatment if any of the conditions are met. Examples for business rules:

- If Customer Segment = VIP and Number of Calls Today > 1, then route directly to VIP agent
- If Customer Segment = Platinum or Customer Segment = Gold, then play the preferred customer announcement

The list below defines the possible options for comparison:

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equal to</td>
<td>Compare variable with a value to see if they are equal.</td>
</tr>
<tr>
<td>Not equal to</td>
<td>Compare variable with a value to see if they are not equal.</td>
</tr>
<tr>
<td>Condition</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Containing</td>
<td>Compare variable with a value to see if the variable contains the value.</td>
</tr>
<tr>
<td>Not containing</td>
<td>Compare variable with a value to see if the variable doesn't contain the value.</td>
</tr>
<tr>
<td>Matching pattern</td>
<td>Compare variable with a value to see if the variable matches the pattern in the variable.</td>
</tr>
<tr>
<td>Not matching pattern</td>
<td>Compare variable with a value to see if the variable does not match the pattern in the variable.</td>
</tr>
<tr>
<td>Starting with</td>
<td>Compare variable with a value to see if the variable starts with the value.</td>
</tr>
<tr>
<td>Not starting with</td>
<td>Compare variable with a value to see if the variable doesn't start with the value.</td>
</tr>
<tr>
<td>Ending with</td>
<td>Compare variable with a value to see if the variable ends with the value.</td>
</tr>
<tr>
<td>Not ending with</td>
<td>Compare variable with a value to see if the variable ends with the value.</td>
</tr>
<tr>
<td>In list (comma separated)</td>
<td>Compare variable with a comma separated list to see if the variable is one of the values in the list.</td>
</tr>
<tr>
<td>Not in list (comma separated)</td>
<td>Compare variable with a comma separated list to see if the variable isn't one of the values in the list.</td>
</tr>
<tr>
<td>Between</td>
<td>Compare variable with two values to see if the variable is between those two values.</td>
</tr>
<tr>
<td>Not between</td>
<td>Compare variable with two values to see if the variable is not between those two values.</td>
</tr>
<tr>
<td>Greater than</td>
<td>Compare variable with a value to see if the variable is greater than the value.</td>
</tr>
<tr>
<td>Greater than or equal to</td>
<td>Compare variable with a value to see if the variable is greater than or equal to the value.</td>
</tr>
<tr>
<td>Less than</td>
<td>Compare variable with a value to see if the variable is less than the value.</td>
</tr>
<tr>
<td>Less than or equal to</td>
<td>Compare variable with a value to see if the variable is less than or equal to the value.</td>
</tr>
<tr>
<td>Blank</td>
<td>Check to see if variable is blank.</td>
</tr>
<tr>
<td>Not blank</td>
<td>Check to see if variable is not blank.</td>
</tr>
</tbody>
</table>

**Multiple Rules**

Multiple rules can be added to the business logic for personalized routing so that many different personalized treatments can be handled within the same call flow.

**Distribution Logic**

N/A
User Interface & Reporting?

Agent UI
N/A

Reporting

Real-time Reporting
The Genesys solution provides KPIs indicating the number of times a specific business rule has been used

Historical Reporting
Intelligent Automation offers a suite of internal reports details below:

Dashboard
  • Application Overview
  • System Pulse
  • Real-time Graphs

Prebuilt Reports
  • Summary
  • Calls per Day
  • Calls by Time of Day
  • Block Results
  • Recognition Summary
  • Business Task Summary

Customer Journeys
  • See what’s important to callers
  • Monitor the impact of changes
  • Compare customer experience
  • Data Extracts (CSV format)
  • Call Details
  • Business Tasks
  • GUI Actions
  • Inbound SMS
Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

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<tr>
<td>• Genesys Customer Authentication (CE07)</td>
<td>• Genesys Call Routing (CE01)</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>• Genesys Personalized Routing (CE02)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

General Assumptions

- The payload of ID&V should include all data to be used by Personalization (such as Customer Segment).
- The use case is supported for Premise and Platform as a Service (IVR PaaS).
- For IVR PaaS, Genesys Intelligent Automation is deployed on premise and IVR ports are in Genesys Engage cloud. Agents can be enabled in Genesys Engage on-premises or Genesys Engage cloud.
- This use case is defined for premise based deployments using Intelligent Automation Omnichannel Self-Service.
- Genesys Intelligent Automation is a required sellable item for this use case.

Customer Responsibilities

External variables require customer integration into a third-party system. We assume that this data can be accessed using a web service.

Document Version

- Version v 1.1.3 last updated July 12, 2021
Genesys Multimodal IVR (CE10) for Genesys Engage on premises

Present your customers with a visual way to complete or complement voice interactions

What's the challenge?

Listening to and entering complex information on an IVR is challenging due to the limitations of DTMF and speech recognition input modes. This leads to low self-service rates, poor customer experience and higher cost to serve.

What's the solution?

Present and capture complex information visually on a smartphone app whilst keeping the IVR call open. This enables users to process information faster and more easily complete their task. Finally, it also enables users to transfer to a live agent if necessary, passing context to the agent.

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 and Distribution Logic
• 5 User Interface & Reporting?
  • 5.1 Agent UI
  • 5.2 Reporting
• 6 Customer-facing Considerations
  • 6.1 Interdependencies
• 6.2 Document Version
Use Case Overview

Story and Business Context

Voice self-service interactions have limitations, especially when it comes to handling multi-step tasks or complex inputs such as alphanumeric characters or email addresses. With the adoption of smartphones, we now have the ability to present callers a visual means to complete their task or complement their voice interaction. The following benefits are based on benchmark information captured from Genesys customers and may vary based on industry or lines of business.

- Increased self-service and reduction of handle time by giving the caller the ability to complete tasks on a visual User Interface rather than transfer to an agent (mixing of visual and voice for information that is difficult to capture on voice, such as address, postal code, email address, or tracking number)
- Improved NPS by providing a more efficient and shorter interaction with the customer
- Lower total cost of ownership by designing the customer experience once and deploying across the voice and visual channels

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Customer Experience</td>
<td>Customer frustration with speech or touchtone entry of complex information such as addresses or letter &amp; number combinations is reduced.</td>
</tr>
<tr>
<td>Improved First Contact Resolution</td>
<td>Customers can complete tasks such as address change or email entry through a visual interface that would be difficult or impossible to do through IVR alone.</td>
</tr>
<tr>
<td>Reduced Handle Time</td>
<td>Capturing complex information visually will reduce IVR dropouts and increase self-service.</td>
</tr>
<tr>
<td>Reduced IT Operational Costs</td>
<td>Single platform for design of multi-modal experiences reduces development and deployment costs.</td>
</tr>
</tbody>
</table>

Summary

The customer can choose a voice or visual channel to navigate the call, as both channels are simultaneously active during the session. The IVR application remains active on the voice channel and reads the textual elements of the visual interface.

The Visual IVR can present menus, messages, and self-service tasks. Context is maintained between voice and visual channels. This is ideal when a customer must enter a complex input or view a complex output. Effectively the voice channel is not convenient for capturing complex information, such as addresses, postal codes, email addresses, or alphanumeric tracking numbers. The Visual IVR ensures accurate, first-time resolution, avoiding customer frustration or escalations.
During the visual interaction, the IVR actively disables the voice input to avoid background noise interfering on the voice channel.

Use Case Definition

Business Flow
The following flow describes the use case from the perspective of the main actors, the agent and the caller.
Business Flow Description

1. A customer calls one of the company’s service lines.
2. The IVR application answers the call.
3. If complex input/output is required, the IVR application offers a Visual IVR to the customer. Genesys offers the visual option (through a voice announcement) to the caller and asks if they would like to proceed. The voice announcement also informs the caller that a smart phone is required.
4. Callers who do not want to proceed with the visual option can continue with the voice-only IVR.
5. Genesys asks if customer wants to proceed with visual interaction
   - If the caller accepts and provides their phone number (as needed), Genesys sends the caller an SMS with a hyperlink to initiate the visual interaction. The voice channel remains active.
   - If the caller clicks on the link in the SMS, the visual interaction on the caller’s mobile web browser is started in parallel to the voice channel. Context can be passed from the voice channel to the visual channel.
6. Genesys displays visual flow while the voice channel helps the caller. During the Visual Interaction phase, the IVR actively disables caller voice input.
7. The customer completes the task on the visual user interface and selects the next option, potentially repeating the previous step.
8. The customer completes all of their tasks and opts to leave the self-service. Once the customer completes the visual IVR task, a regular voice-only IVR may resume the application. For example, once an address change is completed visually, the call might not end and continue via other self-service application and/or escalate to an agent.
9. Genesys ends the session.
Business and Distribution Logic

Business Logic

Is Visual IVR required?

The need for Visual IVR is determined by specific business rules within the Genesys Intelligent Automation IVR application.

Voice prompts and input options

All voice prompts and menu options within this flow can be flexibly changed by the customer.

Distribution Logic

N/A

User Interface & Reporting?

Agent UI

N/A

Reporting

Real-time Reporting

Real-time reporting is not supported for Visual IVR.

Historical Reporting

Intelligent Automation offers a suite of internal reports details below:

Dashboard

• Application Overview
• System Pulse
• Real-time Graphs

Prebuilt Reports

• Summary
• Calls per Day
• Calls by Time of Day
Customer Journeys

- See what’s important to callers
- Monitor the impact of changes
- Compare customer experience
- Data Extracts (CSV format)
- Call Details
- Business Tasks
- GUI Actions
- Inbound SMS

Customer-facing Considerations

Interdependencies

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<tbody>
<tr>
<td>None</td>
<td>None</td>
<td><strong>Self-Service and Automation</strong></td>
<td>None</td>
</tr>
</tbody>
</table>

- Genesys Customer Authentication (CE07)
- Genesys Voice Payment (CE08)
- Genesys IVR Personalization (CE09)

General Assumptions

- The questions in the IVR application used to invoke a visual IVR are asked within Genesys Intelligent Automation.
- Genesys Visual IVR must be selected.
• The Visual IVR application is designed within Genesys Intelligent Automation.
• The company has a database that can be used to complete self-service interactions.
• A Genesys Intelligent Automation Load Balancer and/or customers must route requests to the Visual IVR.
• Implementation of third-party natural language understanding (NLU) engine is out of scope.
• MicroApps are to be chosen from the MicroApp catalogue.
• ORS is required.
• MicroApps can support UTF-8 languages.
• The Genesys Intelligent Automation Control Center required to configure the IVR application and Visual IVR is currently localized to support the following languages:
  • English (United Kingdom)
  • French
  • Spanish (Mexican)
  • German
• Secure passing of context from IVR to Visual channel requires Genesys Intelligent Automation.
• XML/HTTP(S) interface should be provided by customer for backend look ups and access to an SMS Gateway.

Customer Responsibilities

• Customer provides standards-based XML/HTTP web services to support integration to backend systems.
• Customer provides an XML/HTTP web service to support access to an SMS gateway.
• Customer is responsible for the setup and charges relating to the SMS account.

Document Version

• Version v 1.1.3 last updated July 12, 2021
Genesys Knowledge Management (CE28) for Genesys Engage on premises

Important
The capabilities illustrated in this case are part of the Early Adopter Program (EAP), reference the EAP announcement for details.

Offer FAQs to customers and a knowledge library to employees

What's the challenge?
Your customers don't want to call you if they don't have to — they'd prefer to find information on your website. But when online help is unavailable or produces poor search results, neither your customers nor your agents have quick access to the right answers.

What's the solution?
Consolidate knowledge that's scattered throughout your organization in a single searchable repository. Now, your customers can help themselves; but if they do reach out, your agents are also equipped to provide better, quicker assistance. Leverage machine learning to constantly improve and deliver search relevancy.

Other offerings:
   Genesys Engage cloud

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 and Distribution Logic

• 5 User Interface & Reporting?
  • 5.1 Agent UI
  • 5.2 Reporting

• 6 Customer-facing Considerations
  • 6.1 Interdependencies
  • 6.2 Document Version
Use Case Overview

Story and Business Context

Knowledge makes it easier for contact center agents to use information to do their jobs boosting agent productivity and customer satisfaction. With the right knowledge, agents can provide resolution to customer queries in real time. When agents have access to standardized content for frequently asked questions, it helps expedite the customer request. Agents (especially when working from home) can address customer issues by using a knowledge base with vital information to solve customer inquiries.

Knowledge solutions support the following outcomes:

• Promote agent growth and development
• Provide quicker problem solving
• Deliver better, faster decision-making abilities
• Avoids redundant effort by agents
• Reduce repeat callers
• Increase customer satisfaction and productivity
• Reduce training time

When agents have at their disposal up-to-date, easily available and relevant knowledge they provide high customer satisfaction to resolve customer issues.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Customer Experience</td>
<td>Enhance the customer experience by providing rapid access to frequently searched information and use of customer contextual information at every touchpoint reducing customer effort.</td>
</tr>
<tr>
<td>Improved Employee Utilization</td>
<td>High quality, consistent content in the response library improves agent efficiency.</td>
</tr>
<tr>
<td>Improved First Contact Resolution</td>
<td>Improve service by presenting context-specific knowledge to agents that can resolve the customer’s request or issue during the first interaction. With an accurate and up-to-date knowledge base being accessible to agents, they can provide the right information every time to customers negating second and third contacts from customers.</td>
</tr>
<tr>
<td>Reduced Handle Time</td>
<td>Interaction time decreases due to agents receiving customer knowledge search history and no repeating</td>
</tr>
<tr>
<td>Use Case Benefits</td>
<td>Explanation</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>information is necessary. Plus, agents can utilize the knowledge base as well to rapidly respond to customer inquiries.</td>
</tr>
<tr>
<td>Reduced Volume of Interactions</td>
<td>With an implementation of knowledge base, inbound calls normally handled by agents can now be defected due to customers finding the right information the first time they search the knowledge base.</td>
</tr>
</tbody>
</table>

Summary

Agents are empowered to search through knowledge bases for appropriate responses to customer inquiries. Agents can leverage partial or complete content from the knowledge base and have confidence in providing customers with pre-authored responses. Agents provide faster and more relevant responses to customers.

Use Case Definition

Business Flow

(1) Employee Knowledge
**Business Flow Description Authoring for Knowledge Authors**

1. Go to the *Knowledge workbench* to create knowledge documents.
2. Save, train, test and update knowledge documents.
3. Once finalized, the author ‘publishes’ knowledge documents to make it available to Agents or customers (as set by the author in the document).
4. Documents that are published by the author for agents are now available for agents to search through.
5. Documents that are published by the knowledge author for customers are now available to Bot authors to also use in Self Service use cases.

**Knowledge surfacing to Agents**

1. Agent logs into Workspace either Web Edition or Desktop Edition.
2. Agent goes to the knowledge tab and enters a search query.
3. Agent can go through the knowledge results, add the content in knowledge results directly as a response to the customer or browse through the knowledge base to find the required knowledge.
Business and Distribution Logic

Business Logic

Distribution Logic

Required agent skill will be determined by the classification and categorization of the search results.

User Interface & Reporting?

Agent UI

This use case requires:

• Genesys Knowledge Management enabled

Reporting

Real-time Reporting

N/A

Historical Reporting

• Reporting on knowledge surfaced
• Feedback from customers and agents
• Identification of improvements in knowledge

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
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<tbody>
<tr>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>
General Assumptions

1. Genesys Workspace (Desktop or Web Edition) is required
2. Genesys native knowledge management solutions
3. Supports English only
4. Workspace Desktop Edition version 8.5.139.06 and above
5. Workspace Web Edition version 9.0.000.65 and above
6. Genesys Knowledge workbench will be available through Genesys Cloud subscription
7. Available for Organizations in North American regions only

Document Version

- Version v 1.1.1 last updated July 12, 2021
Genesys Chatbots (CE31) for Genesys Engage on premises

Use chatbots to automate customer conversations and seamlessly hand over to a live agent when needed.

What's the challenge?

Many customer service, sales or support conversations with customers are repetitive — Frustrating both for customers as well as employees. If these conversations can be automated at the point of contact, it would save agents a lot of time and significantly improve customer experience.

What's the solution?

Chatbots automate natural conversations across digital channels. Chatbots look up customer information and activity to answer questions. They can hand over conversations with context to an agent when needed, or even offer a callback\(^1\) during or after hours.

\(^1\)Callback option is available for Genesys Engage only.

Other offerings:
- Genesys Cloud
- Genesys Engage cloud
- PureConnect

Contents

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Use Case Overview

Story and Business Context

The proliferation of digital channels leads to higher customer expectations and an increased number of interactions that companies deal with when servicing customers. Coupled with increased usage of Artificial Intelligence (AI) for business applications, this change results in organizations implementing chatbots that can interact with customers to automate tasks and assist their queries on channels such as web, mobile, social, SMS, and messaging apps. Chatbots can alleviate strain on contact center employees while improving the customer experience and controlling costs. Chatbots are always on and available, and can be handed over to an agent at any time where needed. While chatbots can also be used by employees and for business optimization purposes, the remainder of this document refers to omnichannel bots in the context of customer engagement. The primary benefits of chatbots are to increase self-service success, deflect interactions from the contact center, and improve the customer experience.

Genesys supports a “design once, deploy anywhere” concept for bots to enable organizations to provide a seamless customer experience across voice and digital channels. This use case focuses on deploying a bot on web chat, mobile chat, Facebook Messenger, Twitter Direct Message, Line Messaging, WhatsApp, or SMS.

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:

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<th>Use Case Benefits</th>
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<tbody>
<tr>
<td>Improved Containment Rate</td>
<td>Increase self-service interactions to reduce agent-assisted interactions for repetitive or common requests</td>
</tr>
<tr>
<td>Improved Customer Experience</td>
<td>Reduce the time required to address the customer request, handle off-hour contacts, offer immediate options, and improve outcomes.</td>
</tr>
<tr>
<td>Improved First Contact Resolution</td>
<td>Present a customer experience that is tailored to the individual based on who they are, why they might be interacting, and the status of the contact center</td>
</tr>
</tbody>
</table>

Summary

Genesys Chatbots supports "bring your own technology model" supporting Amazon Lex, Google Dialogflow, and third-party bots. As each chatbot and third party has their own specific capabilities, this use case covers broadly available capabilities. The chatbot supports or orchestrates the following capabilities:

- Personalization – to tailor the experience based on context from the current interaction or from previous interactions
- Natural Language Understanding – to derive intents and entities
- Identification & Verification (ID&V) – to identify and verify the customer if required
- Directed Dialog – to automate relevant business processes or provide information
- Involve supported third-party NLU/bot platforms, if it specializes in a particular topic
• Handoff to an agent – to connect the customer to a live person with the full context of the interaction
• Offer and schedule a callback - if outside of business hours or long wait time then chatbot offers an immediate or scheduled callback
• Offer a chatbot survey depending on business context

Use Case Definition

Business Flow

When a customer interacts through a supported Genesys digital channel, a chatbot is initiated. The chatbot first attempts to use context to anticipate why the customer may be engaging and in turn provides personalized messages or options to resolve the query. If no personalization options exist, the chatbot asks the customer an open question, such as "How may I help?".

Once the customer responds, the chatbot tries to interpret the request to determine intent and then decide what to do next. For example, if the customer replies with "I want to check my balance", the chatbot would first identify and verify them before showing their balance.

Once the task is completed, the chatbot asks if the customer needs more help. The customer can respond by asking another question, requesting to chat with an advisor, or replying 'no'. If the customer replies with 'no', the chatbot can offer a survey based on context.

If the customer chooses to speak or chat with an agent and there is a long wait time or it is outside of business hours, then the chatbot can offer a callback option or present a suitable message.

The chatbot continues in this fashion, creating a conversational loop and building up context between itself and the customer to better solve their query.

The following diagram shows the business flow of the use case:
1. A chat interaction is initiated (reactive or proactive) across a supported channel.

2. The customer receives a standard welcome message from the chatbot.

3. Customer information and/or context is retrieved from:
   - Customer profile information in UCS
   - Genesys User Data (e.g. Altocloud Segment or from the website passed by Genesys Widgets)
   - API call to third-party data source

4. The customer receives a personalized message/menu or is handed over to an agent. Examples include:
   - Custom message or update: "Your next order is due to be delivered on Thursday before 12."
   - Most likely contact reason: "Do you want to find out about the loan application you have in progress?"
   - Tailored menu with most likely options: "Main menu: you can choose Balance, Payments, or TopUps."
   - Customer is handed over directly to an agent because they owe an outstanding balance
   - If the customer is not handed over to an agent, the customer could end their chat, confirm the contact reason, or continue.

5. Assuming the customer has moved on from the Personalization stage, the chatbot asks an open-ended question like: “How may I help you?” to determine intent and capture the customer’s response. (BL3)

6. The customer’s response is then sent to a third-party NLU engine via API. [BL1-BL4]
   - If intent and entities are returned, the conversation moves to the correct point in the interaction flow, which could be within one of the following sub-flows (or microapps):
     - Identification & Verification
• Automated business process (such as payment collection microapp)
• Handoff to live agent
• If intent and entities are not returned, the chatbot returns a retry message like: "Sorry, we didn’t understand your question. Please ask another question or reply AGENT for live assistance.”

7. Upon completion of a task, the chatbot asks a follow-up question like: “Is there anything else I can help you with?” [BL2-BL3]
• If the customer responds "yes", they’re brought back to Step 5: "How may I help you?".
• If the customer responds "no", the chatbot decides whether or not to offer them a survey (see step 8).
• If the customer responds with a more advanced answer, the response is sent to a third-party NLU engine via API to determine intent and entities for further processing.

8. Customer information and/or context is retrieved to determine whether to offer a survey. [BL5]
• If a survey is to be offered, the chatbot continues to the next step.
• If no survey is to be offered, the chatbot shows a goodbye message and ends.

9. The chatbot asks the customer: "Would you like to participate in our survey?"
• If the customer answers "yes", then they continue to the next step and engage in a survey.
• If the customer answers "no", then they continue to the final step and are shown a goodbye message.

10. The survey is executed. The survey questions are configurable by the customer on a business-as-usual basis and therefore no dialog flow is defined here. This dialog uses the Genesys Intelligent Automation Questionnaire Builder microapp.
• The chatbot presents a goodbye message and ends the chat.
Business and Distribution Logic

Business Logic

**BL1: Agent Handoff:** The customer can ask to be connected to an available agent. At that point, the chatbot is disconnected and the chat transcript (excluding sensitive data) is displayed in the agent desktop. Other context can also be displayed as Case Data.

**BL2: Retries:** The number of retries for self-service tasks and questions can be configured by a business user. When reaching maximum retries, the dialog can be configured to present a message, hand off to an agent, or offer a callback if busy or outside business hours.

**BL3: Response Type:** The interaction flows can be configured to accept natural language responses and closed responses such as account number, date of birth, and yes/no questions; enabling customers to backtrack to a different point in the dialog when required. For example, if a customer is midway through making a payment and says "actually just tell me where your nearest branch is", then the chatbot shows the nearest branch.

**BL4: Callback:** If outside of business hours, or estimated wait time (EWT) is high, the chatbot can offer an immediate or scheduled callback. If this option is not included, then a message states that a transfer is not possible.

**BL5: Survey:** The customer can determine whether to address a survey or not, based on:

- Customer profile information in UCS
- Journey context from Altocloud or customer journey data
- API call to third-party data source

Distribution Logic

When the conversation is handed over to a live agent, the interaction moves to one of these use cases, depending on the channel the customer is using the use cases listed under the interdependency section.

User Interface & Reporting?

**Agent UI**

The agent desktop requirements for the required digital use cases can be referenced by clicking on the respective use case in the interdependencies section.

Chat transcript between customer and chatbot is populated in the chat interaction window in the agent desktop.
Reporting

Real-time Reporting

The following is a summary of real-time metrics, for more details reference the eServices Statistics for additional information.

- Agent Group capacity for chat interactions to define whether or not to offer escalation to customer service.
- Concurrent Chats statistic in the Chat Agent Activity template is helpful in assessing Agent Group capacity for chat interactions to define whether or not to offer escalation to customer service.
- Chat Agent Activity is applicable for Agent and Agent Group object types.
- Current Chat interactions waiting in the system
- Current Wait statistic in Chat Queue Activity template addresses "Current Chat interactions waiting in the system".
- Total Chat interactions (self-service vs assisted service). Below are a list of available templates:
  - Chat Agent Activity> Offered: The total number of chats that were offered for processing to this agent or agent group during the specified period. This stat type counts interactions both offered by business routing strategies and other agents.
  - Chat Agent Activity> Accepted: The total number of chats that were offered for processing and that were accepted by Agent during the specified period.
  - Chat Queue Activity>Requested: Total number of Chats Requested.
  - Chat Queue Activity> Accepted: Total number of Chats Accepted by Agent.
  - Chat Offered/Accepted: This metric is suited to Agents only (assisted service), unless some adapter for bots is used, the one that expose itself as an agent.
  - Chats Requested: Represents all requests for new chats. These chats later may be served by agents or by bots.

Agent Group Status: There are out-of-the box templates with the same name with lots of useful statistics available supporting multimedia channels email, voice, chat etc., found in the Genesys Pulse Agent Statistics reference.

Historical Reporting

Intelligent Automation offers a suite of internal reports details below:

Dashboard

- Application Overview
- System Pulse
- Real-time Graphs

Prebuilt Reports

- Summary
- Calls per Day
- Calls by Time of Day
- Block Results
Genesys Chatbots (CE31) for Genesys Engage on premises

- Recognition Summary
- Business Task Summary

**Customer Journeys**

- See what’s important to callers
- Monitor the impact of changes
- Compare customer experience
- Data Extracts (CSV format)
- Call Details
- Business Tasks
- GUI Actions
- Inbound SMS

For more information regarding Historical Reporting for bots, reference the Bot Dashboard page.

**Customer-facing Considerations**

**Interdependencies**

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
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<tr>
<th>All of the following required:</th>
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<tr>
<td>Digital</td>
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<td>Genesys Social Media Routing (CE19)</td>
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<td>Genesys SMS Routing (CE29)</td>
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<td>Genesys Personalized Digital Routing (CE20)</td>
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<td></td>
<td>Genesys Predictive Engagement (CE37)</td>
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<td></td>
</tr>
<tr>
<td>Self-Service and Automation</td>
<td>Genesys Knowledge Management (CE28)</td>
<td></td>
<td>None</td>
</tr>
</tbody>
</table>
General Assumptions

- This Use Case is supported by industry templates that contain examples of chatbot applications combining personalization, natural language understanding, AI, and microapps. Chatbot application requirements including required microapps are confirmed during design. These application templates are created for Financial Services, Telco, and Travel.

- Handoff to agent is on the same channel (unless callback).

- NLU capabilities for languages can be supported through integrations to third-party NLU engines such as Google Dialogflow.

- The Genesys Control Center to configure Chatbots is localized to support the following languages:
  - English (United Kingdom)
  - French
  - Spanish (Mexican)
  - German

- Callback Dialogflow is provided by the Smart Transfer microapp.

- Chat transcript is not passed to callback agent.

- Survey Dialogflow is provided by Questionnaire Builder microapp. Results available for download from Genesys Intelligent Automation Control Center or via web service. Review Menu Block documentation for further details.

- To deploying bots when Dialog Engine is the NLU provider, see Integrating Intelligent Automation with Dialog Engine. (Dialog Engine is not available on Genesys Engage. It is only available on Genesys Cloud).

Document Version

- Version V 1.0.8 last updated July 12, 2021
Genesys Voicebots (CE41) for Genesys Engage on premises

Use voicebots to automate customer conversations and seamlessly hand over to an agent if needed.

What's the challenge?

When your customers call in to self-service or need an agent, they want to get off the phone as soon as possible. Traditional IVRs are complex menu mazes that are unfriendly to use and confuse customers. This leads to longer agent interactions and increases cost of service for an organization.

What's the solution?

Deliver a smooth service experience for customers with a bot that intuitively understands customer issues in natural language. It improves contact center operations as agents do not need to intervene for repetitive issues.

Other offerings:
Genesys Cloud Genesys Engage cloud PureConnect

Contents

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Genesys Voicebots (CE41) for Genesys Engage on premises

- 5.1 Agent UI
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  - 6.1 Interdependencies
  - 6.2 Document Version
Use Case Overview

Story and Business Context

Successful companies strive to provide good experiences for their customers, but doing so becomes challenging and expensive given the multitude of communications channels (voice and digital) that must be offered to interact with customers. It is increasingly expensive to serve customers with live agents and companies need to optimize efficiencies in cases when requests can be fully or partially automated and serve customers faster and more economically. Customer Service costs are sustainable for self-service channels like in-app, web self-service, and virtual assistant but they begin to increase with web chat and exponentially skyrocket with voice. The challenge to customer service leaders is to provide outstanding experiences for customers by utilizing automation and artificial intelligence blended with human interaction where required.

Blending bots technology with voice, self-service and digital applications enables companies to optimize service without incurring costs associated with live customer interactions. Designing customer experiences with voicebots delivers the following:

- Ability to manage the customer entire journey, automated wherever possible, human touch when needed, for example, chatbots, voicebots, and Altocloud
- Create personalized bot experiences by sharing context across voice and digital channels and with agents
- Voicebots in general provide significant higher benefits than a traditional IVR due to more advanced technology and the introduction of Conversational AI which promote a more natural interaction providing a high-quality customer experience
- Quickly and easily deploy omnichannel bots with Natural Language Understanding (NLU) and pre-built microapps that leverage industry best practice
- Move to cloud at your own speed and at low risk with cloud, hybrid, and premise options
- Inclusion of voicebots powered by Natural Language Understanding from Google DialogFlow and Amazon Lex and other third-parties to provide natural and rich conversational experiences for customers who call Customer Service. Spoken phrases from customers are transcribed to text by Google Cloud Speech to Text which is then interpreted by the chosen NLU application to identify the customer’s intent. For example, book a flight; extract key data for the query such as origin and destination city, date, day, time; and generate an appropriate response and/or further questions to continue the interaction.

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:

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<th>Explanation</th>
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</thead>
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<tr>
<td>Improved Containment Rate</td>
<td>Increase self-service interactions results in reduced agent-assisted interactions for repetitive or common requests.</td>
</tr>
<tr>
<td>Improved Customer Experience</td>
<td>Reduce time to serve, which in turn improves Net Promoter Score (NPS). Improve self-service containment</td>
</tr>
</tbody>
</table>
Use Case Benefits | Explanation
--- | ---
rates, handle time, and overall customer experience by enabling routing to the right self-service application by correctly identifying intent. | Improved First Contact Resolution
Present a customer experience that is tailored to the individual based on who they are, why they might be interacting, and the status of the contact center. | Reduced IT Operational Costs
Reuse of existing assets and the option to use less expensive speech alternatives

Summary

Genesys supports a “design once, deploy anywhere” concept for AI-driven bots to enable organizations to provide a seamless customer experience across voice and digital channels. This use case focuses on deploying a bot on the voice channel and can automatically be extended to digital channels by adding the Genesys Chatbots with Blended AI Use Case. The voicebot supports and orchestrates the following capabilities:

- Personalization – to tailor the experience based on context from the current interaction or from previous interactions
- Natural Language Understanding (NLU) – to derive intents and entities
- Intent classification utilizes NLU to classify the customer's intent with high accuracy, and connect the customer to the correct self-service process or agent. Also NLU derives entities, which are pieces of relevant information from customer utterances such as: account numbers, amounts, and other parameters that are returned to complete a process corresponding to the intent thus enabling a conversational experience.
- Identification & Verification (ID&V) – to identify and verify the customer if necessary
- Directed Dialog – to automate relevant and structured business processes or provide information
- Involve another NLU/AI platform – if it specializes in a particular topic
- Hand off to a voice agent – to connect the customer to a live person with the full context of the interaction
- Offer and schedule a callback - if outside of business hours or long wait time then the voicebot offers an immediate or scheduled callback from the voice channel (requires GMS)
- Offer a voicebot survey depending on business context
Use Case Definition
Business Flow
1. A voice interaction is initiated (reactive or proactive) on the voice channel.

2. The customer hears a standard welcome message from the voicebot.

3. Customer information and/or context is retrieved from:
   - Customer profile information in UCS
   - Genesys User Data
   - API call to third-party data source

4. The customer hears a personalized message or menu or is handed over to a voice agent. Examples include:
   - Custom voice message or update, such as "Your next order is due to be delivered on Thursday before 12"
   - Most likely contact reason, such as "Do you want to find out about the loan application you have in progress?"
   - Customer is provided personalized menu options.
   - Customer is routed over directly to a voice agent if, for example, they have an overdue payment or a callback is scheduled. If the customer is not handed over to a voice agent, then at this point the customer could end their call, confirm the contact reason, or continue.

5. Once the customer has moved on from the Personalization stage, the voicebot asks an open-ended question like: "How may I help you?" to determine intent (and entities) and capture the customer's response.
   - The customer speaks to the voicebot in natural language. For example the customer could say "I missed a bill payment and want to check my balance because I think I'm in arrears"
   - The voicebot listens to the customer and converts the raw spoken utterance into text.

6. The voicebot then sends the customer's response to the configured NLU engine. If intent and entities are returned, the conversation moves to
the correct point in the interaction flow, which could be within one of the following sub-flows.

7. Identification and Verification (ID&V)
   - Automated business process (such as Payment Collection microapp).
   - Handoff to live voice agent or schedule a callback (see the relevant use case for the channel).
   - If intent and entities are not returned, the voicebot plays a prompt such as: “Sorry, I didn’t understand your question. Please ask me another question or say AGENT for live assistance.”
   - Fallback to DTMF is an optional capability that can be quoted by Professional Services separately as it is not included in the scope of this use case.

8. Upon completion of a task, the voicebot asks a follow-up question like: “Is there anything else I can help you with?”
   - If the customer says something like “yes”, they’re brought back to Step 5: “How may I help you?”
   - If the customer says something like “no”, the voicebot decides whether or not to offer them a survey (see the next step). If the customer responds with a more advanced answer NLU Engine determines intent and entities for further processing.

9. Customer information and/or context is retrieved from the following sources to determine whether to offer a survey which is available within Genesys Intelligent Automation only (steps 8-10):
   - Customer profile information in UCS
   - Genesys User Data
   - API call to third-party data source
   - Logic defined in Intelligent Automation
   - If a survey is to be offered, the voicebot continues to the next step.
   - If no survey is to be offered, the voicebot shows a goodbye message and ends

10. The voicebot asks the customer: “Would you like to participate in our survey?”
• If the customer answers something like "yes", then they continue to the next step and engage in a survey.

• If the customer answers something like "no", then they are shown a goodbye message and the voicebot ends.

11. Optional: If the survey results meet a certain criteria based on the configured evaluation parameters, a specific action can be taken. For example, if the customer provides a negative response, they can be routed to a live agent.

Business and Distribution Logic

Business Logic

BL1: Agent Handoff: The customer can ask to be connected to an available voice agent. Other context can also be displayed as Case Data.

BL2: Retries: The number of retries for self-service tasks and questions can be configured by a business user. Upon maximum retries, the dialog can be configured to play a message, hand off to a voice agent, or offer a callback if busy or outside of business hours.

BL3: Response Type: The interaction flows can be configured to accept natural language spoken responses as well as closed spoken responses such as account number, date of birth, and yes/no questions.

BL4: Callback: If outside of business hours, or estimated wait time (EWT) is high, the voicebot can offer an immediate or scheduled callback. If this option is not included, then a message is played back to the caller that a transfer is not possible.

BL5: Survey: The customer can determine whether to address a survey or not. This can be based on:

1. Customer profile information in UCS
2. Genesys User Data
3. API call to third-party data source

Parameters Influencing Voicebot Behavior

This Use Case is supported across industry verticals. The basic features of voicebot business logic such as personalization are parametrized. Example parameters include:

• Personalization
• Segmentation, offer management, characteristics, and most likely contact reason
• Intents - the goal of the interaction - for example, a "pay_bill" intent returned by NLU Engine would indicate that the customer should be presented with an authentication business process followed by a payment business process
• Entities - Additional pieces of key information returned by NLU Engine. These can accelerate the conversation by pre-populating answers to subsequent questions
• Confidence levels

Agent Handoff:
• Based on user choice, such as "I want to speak to an advisor"
• Based on default handling, such as retries, timeouts, global commands
• Based on application logic such as customer with an outstanding debt and application decides to transfer

Callback
• Estimated wait time to determine whether to offer callback

Survey
• Based on context from UCS, Genesys User Data, or third-party web service

Distribution Logic
When the conversation is handed over to a live agent, the interaction moves to one of these use cases, depending on the channel the customer is using - please see the Use Case Interdependencies section for related use cases.

User Interface & Reporting?

Agent UI
N/A

Reporting

Real-time Reporting
The following is a summary of real-time metrics, for more details reference the eServices Statistics for additional information.
• Agent Group capacity for chat interactions to define whether to offer escalation to customer service.
• Concurrent Chats statistic in the Chat Agent Activity template is helpful in assessing Agent Group capacity for chat interactions to define whether to offer escalation to customer service.
• Chat Agent Activity is applicable for Agent and Agent Group object types.
• Current Chat interactions waiting in the system

• Current Wait statistic in Chat Queue Activity template addresses "Current Chat interactions waiting in the system".

• Total Chat interactions (self-service vs assisted service). Following are a list of available templates:
  • Chat Agent Activity> Offered: The total number of chats that were offered for processing to this agent or agent group during the specified period. This stat type counts interactions both offered by business routing strategies and other agents.
  • Chat Agent Activity> Accepted: The total number of chats that were offered for processing and that were accepted by Agent during the specified period.
  • Chat Queue Activity> Requested: Total number of Chats Requested.
  • Chat Queue Activity> Accepted: Total number of Chats Accepted by Agent.
  • Chat Offered/Accepted: This metric is suited to Agents only (assisted service), unless some adapter for bots is used, the one that exposes itself as an agent.
  • Chats Requested: Represents all requests for new chats. These chats later may be served by agents or by bots.

• Agent Group Status: There are out-of-the-box templates with the same name with lots of useful statistics available supporting multimedia channels email, voice, chat and so forth, found in the Genesys Pulse Agent Statistics reference.

Historical Reporting

Intelligent Automation offers a suite of internal reports details:

Dashboard
  • Application Overview
  • System Pulse
  • Real-time Graphs

Prebuilt Reports
  • Summary
  • Calls per Day
  • Calls by Time of Day
  • Block Results
  • Recognition Summary
  • Business Task Summary

Customer Journeys
  • See what’s important to callers
  • Monitor the impact of changes
  • Compare customer experience
  • Data Extracts (CSV format)
Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
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<td>None</td>
<td><strong>Inbound</strong></td>
<td></td>
</tr>
<tr>
<td>• Genesys Call Routing (CE01)</td>
<td></td>
<td>• Genesys Predictive Routing for Customer Service (BO06)</td>
<td></td>
</tr>
</tbody>
</table>

**Self-Service and Automation**

• Genesys Knowledge Management (CE28)

General Assumptions

• Use Case supports voice channel. Genesys Chatbots (CE31) for Genesys Engage on premises supports digital channels.

• This Use Case is supported by industry templates that contain examples of voicebot applications combining personalization, natural language understanding, AI, and microapps. Voicebot application requirements including required microapps are confirmed during design. These application templates are created for Financial Services, Telco, and Travel.

• Handoff to voice agent is on the same channel.

• NLU Engine has been "trained" with intents.

• NLU capabilities for other non-English languages can be supported through third-party NLU engines such as Google DialogFlow. Integration to third-party NLU/AI engines is a customization task. Dialogs that do not require NLU can support any language by using Personas.

• Callback dialog flow is provided by the Intelligent Automation Smart Transfer microapp.

• Chat transcript is not passed to callback agent.
• Survey dialog flow is provided by the Intelligent Automation Questionnaire Builder microapp. Results available for download from the Intelligent Automation Control Center or via web service.

• The Intelligent Automation Control Center (for Genesys Engage on-premises) to configure voicebots is localized to support the following languages:
  1. English (United Kingdom)
  2. French
  3. Spanish (Mexican)
  4. German

• The IVR transcript will not pass in Genesys Engage on-premises.

• The voicebot is deployed in a Hybrid model, that is, Genesys Engage infrastructure on premise with Google speech, and other NLU providers on the Cloud.

• Dialog Engine is not available for Genesys Engage. It is only available on Genesys Cloud.

Customer Responsibilities

• Voicebot configuration and settings will be quoted as part of a Professional Services engagement to capture requirements and business logic.

Document Version

• Version 1.1.3 last updated July 12, 2021
Genesys Workforce Engagement Use Cases for Genesys Engage on-premises

Sort or search the table to find the use case you need to edit. Click the title link to go to the use case.

<table>
<thead>
<tr>
<th>Use Case</th>
<th>Subtitle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Genesys Workforce Scheduling for Voice (EE01)</td>
<td>Optimize employee utilization for voice interactions</td>
</tr>
<tr>
<td>Genesys Omnichannel Workforce Scheduling (EE02)</td>
<td>Optimize employee utilization for all digital interactions</td>
</tr>
<tr>
<td>Genesys Shrinkage Management (EE03)</td>
<td>Improve operational effectiveness by better managing agent non-working time</td>
</tr>
<tr>
<td>Genesys Schedule-based Routing (EE04)</td>
<td>Enable schedule-based routing</td>
</tr>
<tr>
<td>Genesys Voice Recording (EE07)</td>
<td>Record voice interactions</td>
</tr>
<tr>
<td>Genesys Voice and Screen Recording (EE08)</td>
<td>Record voice and screen interactions</td>
</tr>
<tr>
<td>Genesys Quality Management (EE09)</td>
<td>Improve employee performance with quality management</td>
</tr>
<tr>
<td>Genesys Employee Schedule Preferences (EE10-A)</td>
<td>Empower employees with self-administration of their schedule</td>
</tr>
<tr>
<td>Genesys Employee Schedule Preferences (EE10-B)</td>
<td>Empower employees with self-administration of their schedule</td>
</tr>
<tr>
<td>Genesys Employee Schedule Preferences (EE10-C)</td>
<td>Empower employees with self-administration of their schedule</td>
</tr>
<tr>
<td>Genesys Employee Schedule Preferences (EE10-D)</td>
<td>Empower employees with self-administration of their schedule</td>
</tr>
<tr>
<td>Genesys Shift Bidding (EE11)</td>
<td>Empower employees to influence their schedules</td>
</tr>
<tr>
<td>Genesys Training and Activity Scheduling (EE12)</td>
<td>Manage training, coaching and offline activities scheduling across the workforce</td>
</tr>
<tr>
<td>Genesys Skills Assessment (EE13)</td>
<td>Automate employee skills and capability assessment</td>
</tr>
<tr>
<td>Genesys Performance Management (EE14)</td>
<td>Identify and compare employee performance</td>
</tr>
<tr>
<td>Genesys Proficiency Development (EE15)</td>
<td>Automate personal development plan for employees</td>
</tr>
<tr>
<td>Genesys Skills Management (EE16)</td>
<td>Align employee skills and capability with operational performance</td>
</tr>
<tr>
<td>Genesys Outsourcer Management (EE17)</td>
<td>Manage skills and capabilities of outsourcer employees</td>
</tr>
<tr>
<td>Genesys Compliance Certification (EE19)</td>
<td>Deploy enterprise wide certification programs and fulfill regulatory compliance</td>
</tr>
</tbody>
</table>
Genesys Employee Onboarding (EE20) Automate onboarding for improved speed to competency
Genesys IVR Recording (EE21) Record the entire IVR interaction
Genesys Speech Analytics (EE22) Gain basic insight into voice interactions using speech analytics
Genesys Advanced Text and Speech Analytics (EE23) Achieve deeper operational insights with speech and text Analytics
Genesys Text and Speech Analytics for Customer Service (EE24) Mine call recordings for insights to improve agent and customer experiences
Genesys Text and Speech Analytics for Compliance (EE25) Enforce compliance and legal responsibilities with speech and text analytics
Genesys Back-office Scheduling (EE26) Optimize utilization for back-office and task-based workers
Genesys WFM Third-Party Integration (EE27) Enable bi-directional Integration of WFM with 3rd party systems
Genesys Task-based Scheduling (EE28) Control the scheduling of the sequence of task agents work on
Genesys Compliance Recording (EE29) Enable your contact center to meet quality and/ or regulatory compliance requirement
Genesys Selective Recording (EE30) Deliver selective recording of your agents based on metadata for review purposes
Genesys Agent Assist (EE31) Monitor customer and agent conversations to provide the agent with contextually relevant suggestions.
Genesys Workforce Scheduling for Voice (EE01) for Genesys Engage on premises

**Important**
This use case supports Genesys Engage and PureConnect as the WFM product is supported to run on both platforms.

Optimize employee utilization for voice interactions

**What's the challenge?**
Optimizing employees’ schedules is a tricky balance. Under staff, and customer experience can suffer as wait times climb, SLAs slip, and agents feel pressured. Over staff, and high workforce costs cut into your bottom line. Without easy, accurate forecasts, it’s hard to schedule your workforce effectively.

**What's the solution?**
Find the right balance. Your Genesys solution automatically gathers data, making it easy to get accurate forecasts and scheduling scenarios across queues and activities. Factor in agent skills and contract rules to cover your bases, and get real-time insight and monitoring into SLAs and schedule adherence.

**Other offerings:**
Genesys Engage cloud PureConnect

**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
  • 6.2 Document Version
Use Case Overview

Story and Business Context

This use case describes how Genesys Workforce Management helps you deliver a set of optimized schedules, utilizing agent skills and contract rules whilst providing editing and monitoring capabilities in the contact center.

A critical aspect to routing the call to the right agent is having an agent with the needed skills available to meet demand. Our solution optimizes staffing levels throughout the day and week to meet demand. As caller needs are identified and available skill segment agents are known, then optimal matching of the two can occur. Getting the caller to the most appropriate resource on the first pass results in fewer transfers, shorter contacts, and improved customer satisfaction.

The solution offers visibility into current information on agent performance metrics, schedule adherence and forecast variances. With this information, our solution allows for better management of variances between target and actual availability. Our solution also allows for specific adherence tools such as thresholds for maximum acceptable handle times.

The solution enables the precise scheduling of contact center agents based on integrated forecasting of expected activity. That means organizations are more likely to have an appropriate level of staffing for all portions of the workday. The result is reduced staffing costs, reduced telephony expenditures, and improved customer satisfaction.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Agent Adherence</td>
<td>Help supervisors and agents to manage adherence to scheduled work.</td>
</tr>
<tr>
<td>Improved Employee Utilization</td>
<td>Optimize planning and resource utilization through accurate omnichannel forecasting &amp; scheduling and skills</td>
</tr>
<tr>
<td>Reduced Administration Costs</td>
<td>Reduce manual workforce scheduling activities by decreasing the time and costs associated with manual WFM efforts through the automatic updates of data, schedule shifts and database for skills and schedules. Reduce overtime expenditures by improving accuracy and precision of staff forecasting through Genesys WFM planning</td>
</tr>
<tr>
<td>Reduced Employee Attrition</td>
<td>Empower agents with more control over their schedules by identifying skill gaps and extending mobility and easy-to-use web-based tools</td>
</tr>
</tbody>
</table>
Use Case Benefits

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reduced Overtime Costs</td>
<td>Optimizing Employee occupancy reduces overtime and therefore overtime costs.</td>
</tr>
</tbody>
</table>

Summary

Deliver a set of optimized schedules, utilizing agent skills and contract rules whilst providing editing and monitoring capabilities in the contact center.

Use Case Definition

Business Flow

(1) Business Flow - Forecasting

The business flow described below requires the base configuration of the WFM to be completed and historical data to be available. The base configuration will be done by Genesys Professional Services within the scope of this use case as described below.
Business Flow Description

The forecaster imports historical data into the configured system. The forecaster works through the forecast process:

1. Creates a scenario or continues working on a previously saved scenario.

2. Uses the Forecasting wizard to build a volume forecast:
   - selects the appropriate forecasting methodology
   - selects which activities to forecast
   - forecast is generated
   - makes manual changes

The forecaster uses the Staffing Build Wizard to determine the FTE requirements:
   - defines indirectly occupied
   - defines service level targets
   - defines shrinkage levels
   - publishes the master forecast

Supervisors and Agents submit requests for changes into the system:
   - Exceptions
   - Meetings
   - Time off requests

The forecaster modifies the forecast as required.

When the forecast is ready to be published, the forecaster publishes it to become Master.

The Scheduler is notified that the Master forecast is published.
Business Flow

(2) Business Flow - Scheduling
Business Flow Description

1. The scheduler validates & sense checks the live forecast.

2. The scheduler uses the ‘Schedule Build Wizard’ to generate schedules:
   - selects sites and build parameters for each site.

3. Manual modifications are made as needed.

4. The scheduler publishes the master schedule.

5. Agents are notified of the detail of their working hours.

6. The schedules are modified as required.

7. Once the schedule is ready for hand-off to Intraday Management, the Scheduler will publish the Master Schedule and Intraday Management will be informed.
Business Flow

(3) Business Flow - Intraday
1. The forecasters, schedulers, planners or supervisors manage adds, moves and changes to existing schedules based on their individual access rights, for example:
   - Time off / sickness requests
   - Changing breaks & meals in response to changing demand

2. Agents are notified of changes as appropriate

3. Master schedule is kept current

4. Scheduler and Forecaster evaluate accuracy of forecast to actual and adjust accordingly.

5. Supervisors can monitor the adherence of the agents in their team to the published schedule.
Business and Distribution Logic

Business Logic

A prerequisite to any basic WFM deployment is a formal Discovery process with resulting commensurate documentation.

This diagram shows the basic components that need to be considered when configuring WFM.
Distribution Logic

N/A
User Interface & Reporting?

Agent UI

Agents access the WFM Web Agent UI with a supported browser. There is no Java in this UI. See Supported Operating Environment Guide for specific browser support.

Reporting

Real-time Reporting

The following figure shows the reporting flow:
Approved, authorized staff can generate, schedule, and distribute out-of-the-box reports in the following categories:

- Configuration
- Forecast
- Performance
- Schedule
- Adherence
- Audit

The Genesys WFM product contains a number of out-of-the-box real-time reporting elements. Details can be found in the Workforce Management Administrator Guide.

**Historical Reporting**

The Genesys WFM product contains a number of out of the box real-time and historical reporting elements. Details can be found in the Workforce Management Administrator Guide.

**Customer-facing Considerations**

**Interdependencies**

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
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<tr>
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<td>• <strong>Inbound</strong></td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>• Genesys Call Routing (CE01)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Genesys Personalized Routing (CE02)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**General Assumptions**

- Interaction type is inbound voice only.
- Does not include any of these advanced options:
• Advanced Configuration - Digital Transactions:
  • Queues
  • Statistics
  • Importing Historical Data Volumes
  • Forecasting techniques
  • Reporting
• Advanced Configuration - Enterprise Workload Management Transactions:
  • Queues
  • Statistics
  • Forecasting techniques
  • Reporting
• Creation of more than six Security Roles
• Advanced Configuration - Schedule States development to enable shrinkage tracking
• Creation of more than six Adherence Rules
• Advanced Configuration - Exceptions development to enable shrinkage tracking
• Advanced Configuration - Agent Initiated Exceptions
• Advanced Configuration - Activity Groups
• Advanced Configuration - Email Notifications
• Advanced Configuration - Custom color schemes
• Advanced Configuration - Advanced Out-of-the-Box Reporting and Forecast Graphs
• Advanced Forecasting - Shrinkage Tracking (Planned / Unplanned Overheads)
• Advanced Scheduling - Activity Sets
• Advanced Scheduling - Task Sequences
• Advanced Scheduling - Agent Shift Trading
• Advanced Scheduling - Rotating Patterns
• Advanced Scheduling - Overtime Management
• Advanced Scheduling - Secondary Shifts
• Advanced Scheduling - Profile Scheduling
• Advanced Scheduling - Agent Shift Preferences
• Advanced Scheduling - Agent Schedule Bidding
• Advanced Scheduling - Scheduling Team Managers
• Advanced Scheduling - Shared Transportation Configuration
• Automated Time Off (stage 1) - Web Agent Application enabled for agents to request Time Off
• Automated Time Off (stage 2) - Time Off Rule Calculations with balance tracking
Automated Time Off (stage 3) - as above + Time Off Bidding
Automated Time Off (stage 4) - as above + Time Off Limits
Advanced Customization - Additional tab custom content of Agent Web
Advanced Customization - HR/Payroll Integration
Advanced Customization - ETL Enablement
Advanced Customization - API customization

Any additional Exceptions, beyond the standard predefined list (provided in the FDD) will require additional effort.
Any additional Schedule States beyond the predefined list will require additional effort and are out of the scope of this package.
If additional agents and contracts are needed beyond the pre-defined scope, additional effort will be required.
Historical Reporting: ICON, GIM & GI2 are not included in this package

Assumptions for PureConnect customers running Genesys Workforce Management

PureConnect Platform Assumptions:

- More than 500 WFM agents within their PureConnect system
- Required Workgroup level statistics are available
- The WFM Deployment is within a single site, single data center
- The number of WFM agents included in the base level package is 200 or less; more than 200 agents may require additional base level packages.
- The prerequisites for EE01 on PureConnect are Genesys Call Routing (CE01) and Genesys Personalized Routing (CE02)
- PureConnect GWFM Connector is required to utilize Genesys WFM on PureConnect

The interaction type does not include any of these advanced options:

- Advanced Configuration - additional Security Roles
- Advanced Configuration - Advanced WFM Application Option settings
- Advanced Configuration - Bespoke Schedule Element Colours
- Advanced Configuration - Automated Reports Scheduler
- Advanced Configuration - Audit Reports
- Advanced Forecasting - Forecasting Multi-Site Activities
- Advanced Scheduling - Scheduling Multi-Site Activities
- Advanced Scheduling - Secondary Activities
- Advanced Scheduling - Meeting Planner / Meeting Scheduler
- Advanced Scheduling - 10+ Contracts
- Advanced Scheduling - 10+ Shifts
• Advanced Scheduling - 24/7 Scheduling (night shift management)
• Advanced Scheduling - Shared Transport Management for Supervisors & Agents
• Advanced Customization - Mobile Agent Web

Cloud
• More than 500 WFM agents within their PureConnect system
• Required Workgroup level statistics are available
• The number of WFM agents included in the base level package is 200 or less; more than 200 agents may require additional base level packages.

The interaction type does not include any of these advanced options:
• Advanced Configuration - additional Security Roles
• Advanced Configuration - Adherence Rules
• Advanced Configuration - Advanced WFM Application Option settings
• Advanced Configuration - Bespoke Schedule Element Colours
• Advanced Configuration - Automated Reports Scheduler
• Advanced Configuration - Audit Reports
• Advanced Forecasting - Forecasting Multi-Site Activities
• Advanced Scheduling - Scheduling Multi-Site Activities
• Advanced Scheduling - Secondary Activities
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• Advanced Scheduling - 10+ Shifts
• Advanced Scheduling - 24/7 Scheduling (night shift management)
• Advanced Scheduling - Shared Transport Management for Supervisors & Agents
• Advanced Customization - Mobile Agent Web

Document Version
• Version versions 1.2.4 last updated July 12, 2021
Genesys Omnichannel Workforce Scheduling (EE02) for Genesys Engage on premises

Important
The PS material for this use case has not been finalized. Please contact your local CSD for effort estimates and scope details of this use case. This use case supports Genesys Engage and PureConnect as the WFM product is supported to run on both platforms.

Optimize employee utilization for all digital interactions

What's the challenge?
Your call center may have set hours, but your digital channels are always on. Without the right insights, it’s hard to create balanced schedules that allow your company to be responsive to digital interactions while considering employee hours, contracts, preferences and time off, and labor laws.

What's the solution?
Find the right balance. Your Genesys solution automatically gathers data, making it easy to get accurate forecasts and scheduling scenarios across channels. Factor in arrival patterns and hours of operation to cover your bases, and get real-time insight and monitoring into SLAs and schedule adherence.

Other offerings:
Genesys Engage cloud PureConnect

Contents
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  • 4.2 Business and Distribution Logic
• 5 User Interface & Reporting?
  • 5.1 Agent UI
  • 5.2 Reporting
• 6 Customer-facing Considerations
  • 6.1 Interdependencies
  • 6.2 Document Version
Use Case Overview

Story and Business Context

When a contact center can effectively and accurately forecast and schedule for immediate and deferred work items, efficiency increases and centralization and standardization add even more value.

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:

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<td>Provide accurate omnichannel forecasting &amp; scheduling and skills for optimal planning and resource utilization through integration of routing with WFM</td>
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<tr>
<td>Reduced Administration Costs</td>
<td>Reduce manual workforce scheduling activities by a decrease in time and costs associated with manual WFM efforts through the automatic updates of data, schedule shifts and database for skills and schedules</td>
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<td>Reduced Employee Attrition</td>
<td>Empower agents with more control over their schedules by identifying skill gaps and extending mobility and easy-to-use web-based tools</td>
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</table>

Summary

This element of WFM allows users to forecast and schedule for non-immediate (“deferred”) work items like back office and digital.

Use Case Definition

Business Flow

The business flow described below requires the base set-up of the system as described in the use case “Genesys Workforce Scheduling for Voice (EE01) - Basic”.

Additionally, one or more deferred activities need to be created prior to commencement of forecast process.
Business Flow Description A forecaster runs a staffing forecast in the same way as with inbound voice.

When staffing for deferred items, like back office and digital interactions, different options are presented in the staffing build wizard:

- The initial queue is the size of the backlog
- The service level objectives are expressed differently
  - % of Deferred Work completed in an amount of time (hours, minutes, seconds)
  - Non-interrupted time is a 24-hour clock, meaning if an interaction with a 12 hour SLA arrives at 08:00 (opening time) then it must be completed by 20:00.
  - Interrupted time is based on the opening hours of that activity. In the above example, the contact center closes at 17:00, the interaction must be complete by 11:00 the following day.
  - Business Days is the number of days in between opening and closing time, for example, an interaction arrives Monday it must be completed by Tuesday.
- A different forecasting algorithm is invoked when using deferred activities which does not use Erlang-C logic.
- The schedule generated by this forecast works in the same way as an inbound voice forecast: consumers of the calendar screen see the type of work that users are scheduled to contribute to.
- The end result of this process is a schedule that contains optimal working hours for all agents in the contact center rather than just those working frontline, immediate types of work.
Business and Distribution Logic

Business Logic

n/a

Distribution Logic

n/a

User Interface & Reporting?

Agent UI

Agents access the WFM Web Agent UI with a supported browser. There is no Java in this UI. See Supported Operating Environment Guide for specific browser support.

Reporting

Real-time Reporting

Agents access the WFM Web Agent UI with a supported browser. There is no Java in this UI. See Supported Operating Environment Guide for specific browser support.

Historical Reporting

The Genesys WFM product contains a number of out of the box historical reporting elements. Details can be found in the Workforce Management Administrator Guide.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

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<td>None</td>
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</tr>
<tr>
<td></td>
<td>• Genesys Email Routing (CE16)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
General Assumptions

Assumptions for PureConnect customers running Genesys Workforce Management

PureConnect Platform Assumptions:

This use case can be deployed if one of the following Genesys Digital (Chat, Email, Social, SMS) products is deployed and **Workforce Management is in place**.

Other Assumptions

Because the WFM Web Supervisor uses Java, both JRE and Tomcat are requirements. See Supported Operating Environment Guide for specific versions.

Forecasting & Scheduling for Digital Interactions and / or Back Office transactions must come through Genesys Interaction Server into WFM or be loaded manually & continually through a flat file.

Genesys Workforce Scheduling for Voice (EE01) and Genesys Omnichannel Workforce Scheduling (EE02) can be implemented at the same time.

The customer has the requirement or desire to use this element of advanced WFM.

If using Genesys WFM with PureConnect, please note the following …

- More than 500 WFM agents within their PureConnect system
- Required Workgroup level statistics are available
- The WFM Deployment is within a single site, single data center
- The number of WFM agents included in the base level package is 200 or less; more than 200 agents may require additional base level packages.
- Object type scheduling and forecasting will require workgroups to only handle and be configured for a single object type
- The prerequisites for EE02 on PureConnect are Genesys Email Routing (CE16), Genesys Chat Routing (CE18), Genesys Social Media Routing (CE19) and Genesys SMS Routing (CE29)
- PureConnect GWFM Connector is required to utilize Genesys WFM on PureConnect
The interaction type does not include any of these advanced options:

- Advanced Configuration - additional Security Roles
- Advanced Configuration - Advanced WFM Application Option settings
- Advanced Configuration - Bespoke Schedule Element Colours
- Advanced Configuration - Automated Reports Scheduler
- Advanced Configuration - Audit Reports
- Advanced Forecasting - Forecasting Multi-Site Activities
- Advanced Scheduling - Scheduling Multi-Site Activities
- Advanced Scheduling - Secondary Activities
- Advanced Scheduling - Meeting Planner / Meeting Scheduler
- Advanced Scheduling - 10+ Contracts
- Advanced Scheduling - 10+ Shifts
- Advanced Scheduling - 24/7 Scheduling (night shift management)
- Advanced Scheduling - Shared Transport Management for Supervisors & Agents
- Advanced Customization - Mobile Agent Web

Cloud

- More than 500 WFM agents within their PureConnect system
- Required Workgroup level statistics are available
- The number of WFM agents included in the base level package is 200 or less; more than 200 agents may require additional base level packages.

The interaction type does not include any of these advanced options:

- Advanced Configuration - additional Security Roles
- Advanced Configuration - Adherence Rules
- Advanced Configuration - Advanced WFM Application Option settings
- Advanced Configuration - Bespoke Schedule Element Colours
- Advanced Configuration - Automated Reports Scheduler
- Advanced Configuration - Audit Reports
- Advanced Forecasting - Forecasting Multi-Site Activities
- Advanced Scheduling - Scheduling Multi-Site Activities
- Advanced Scheduling - Secondary Activities
- Advanced Scheduling - Meeting Planner / Meeting Scheduler
- Advanced Scheduling - 10+ Contracts
- Advanced Scheduling - 10+ Shifts
• Advanced Scheduling - 24/7 Scheduling (night shift management)
• Advanced Scheduling - Shared Transport Management for Supervisors & Agents
• Advanced Customization - Mobile Agent Web

Customer Responsibilities

The customer has the requirement or desire to use this element of advanced WFM. This use case has to be enriched by additional information on the scope which would be included in a related PS package. Hackathon team relies on PS input on what needs to be done to implement the functionality described above. Part of this input will flow back in this use case to avoid ambiguity on the customer side.

Document Version

• Version v 1.1.5 last updated July 12, 2021
Genesys Shrinkage Management (EE03) for Genesys Engage on premises

Important

The PS material for this use case has not been finalized. Please contact your local CSD for effort estimates and scope details of this use case. This use case supports Genesys Engage and PureConnect as the WFM product is supported to run on both platforms.

Improve operational effectiveness by better managing agent non-working time

What's the challenge?

Your contact center has many locations, time zones, and employees. Managing shrinkage with a spreadsheet based approach isn't working. Shrinkage is eroding the amount of time agents spend handling customer interactions which leads to increased operational expense, reduced service levels, and customer churn.

What's the solution?

Genesys WFM Solution improves forecast and schedule accuracy by including shrinkage in the plan. Schedule adherence, a primary cause of shrinkage, tracks variances between target and actual employee availability. With accurate workforce scheduling you can deliver higher service levels at lower operating costs.

Other offerings:

Genesys Engage cloud PureConnect

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*
Use Case Overview

Story and Business Context

Forecasting and tracking shrinkage allows a business to deliver a more efficient resource/demand plan by taking that factor into account.

Shrinkage describes the percentage of time that employees are not handling interactions. Examples of different types of shrinkage:

- Planned
  - Vacations
  - Meetings / Training
- Unplanned
  - Sickness
  - Emergency Situation

In Genesys WFM, the term shrinkage is synonymous with the term overheads.

Overheads are assigned to schedule state groups. A schedule state group is a collection of schedule states linked to a site. Schedule states include breaks, meals, exceptions, time off instances and so on.

A forecaster uses shrinkage as an optional step in the forecasting process to pre-plan additional FTE requirements. For example, it is known that vacations & team meetings are going to take place and pre-planning for this to ensure it can go ahead without affecting service level goals.

Shrinkage is attached to a schedule state group, so actual, historical shrinkage achievement can easily be measured and applied to the configured overhead. This will increase the accuracy of future shrinkage planning because it can be based on accurate numbers.

A scheduler can use the schedule state totals screen in Genesys WFM to review the impact of shrinkage levels on service level performance and make changes to the day accordingly, like moving or cancelling team meetings or initiating an overtime process.

A team leader or supervisor may have a shrinkage KPI / MBO - they will want to be aware of how much and what types of shrinkage are occurring in their team. Armed with this information, they will be able to effectively manage their team’s performance which will contribute to the overall performance of their business.

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 Employee Utilization | Improve agent adherence to workforce schedule by gaining better control and management of variances between target and actual availability and shrinkage through visibility into current information on agent performance metrics, schedule adherence and forecast variances. Improve utilization by optimizing planning and resource utilization through accurate omnichannel forecasting & scheduling and skills.
Reduced Administration Costs | Reduce manual workforce scheduling activities by a decrease in time and costs associated with manual WFM efforts through the automatic updates of data, schedule shifts and database for skills and schedules.
Reduced Employee Attrition | Empower agents with more control over their schedules by identifying skill gaps and extending mobility and easy-to-use web-based tools.

Summary
Shrinkage is a generic term used in contact centers to describe the percentage of time that employees are not handling interactions. It must be planned for to allow service targets to be met to an appropriate level of efficiency. Genesys WFM provides a variety of shrinkage management options.

Use Case Definition

Business Flow
The business flow described below requires the base setup of the system as described in the use case "Genesys Workforce Scheduling for Voice (EE01)".
**Business Flow Description**

See the "EE1 - Optimize Agent Utilization for Voice Interactions" document for a general description of the forecasting flow. The additional steps below apply to shrinkage:

1. The forecaster accesses the overheads view within the forecasting module and makes a choice. Do they wish to:
   - use actual historical values via a saved template, or
   - manually enter projected values.

2. The forecaster then chooses the activity/activities that the shrinkage values apply to.

3. The forecaster builds or modifies a staffing forecast using the required staffing wizard, comparing calculated and required FTE values where:
   - Calculated does not account for shrinkage
   - Required does account for shrinkage so FTE requirement will be higher

4. The forecaster decides to publish to master forecast as described in base package use case.

5. The scheduler reviews shrinkage running totals and makes adjustments to live schedule as necessary.

6. Team leaders monitor and manage live schedules.
Business and Distribution Logic

Business Logic
n/a

Distribution Logic
n/a

User Interface & Reporting?

Agent UI
Agents access the WFM Web Agent UI with a supported browser. There is no Java in this UI.

See Supported Operating Environment Guide for specific browser support.

Reporting

Real-time Reporting
The Genesys WFM product contains a number of real time reporting elements. Details can be found in the Workforce Management Administrator Guide.

Historical Reporting
The Genesys WFM product contains a number of out of the box historical reporting elements. Details can be found in the Workforce Management Administrator Guide.

Customer-facing Considerations

Interdependencies
All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>Workforce Engagement</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>
### All of the following required:
- Genesys Workforce Scheduling for Voice (EE01)
- Genesys Omnichannel Workforce Scheduling (EE02)
- Genesys Back-office Scheduling (EE26)

### At least one of the following required:

### Optional

### Exceptions

---

**General Assumptions**

**Assumptions for PureConnect customers running Genesys Workforce Management**

**PureConnect Platform Assumptions:**

The dependency use case covers the PureConnect Platform-specific assumptions. Please be advised that Genesys Back office Scheduling (EE26) is currently not a dependency for this use case for PureConnect. The prerequisites for this use case on PureConnect are Genesys Workforce Management for Voice (EE01) and Genesys Omnichannel Workforce Scheduling (EE02)

- PureConnect GWFM Connector is required to utilize Genesys WFM on PureConnect

**Other Assumptions**

The customer has the requirement or desire to use this element of advanced WFM. The Inbound Voice use case is a pre-requisite of the base WFM package, including the definition of Queues, Stats, Agents & Skills. Because the WFM Web Supervisor uses Java, both JRE and Tomcat are requirements. See Supported Operating Environment Guide for specific versions.

---

**Document Version**

- Version v 1.1.4 last updated **July 12, 2021**
Enable schedule-based routing

What's the challenge?

Ensuring that employees adhere to their schedules is a headache for contact center leaders. When staff are late taking breaks or starting different scheduled work, it impacts your service levels, your sales revenues and your costs.

What's the solution?

Routing interactions based on your workforce management schedules and staff skills can help ensure a better balanced workload for employees and improved schedule adherence.

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 and Distribution Logic
• 5 User Interface & Reporting?
  • 5.1 Agent UI
  • 5.2 Reporting

• 6 Customer-facing Considerations
  • 6.1 Interdependencies
  • 6.2 Document Version
Use Case Overview

Story and Business Context

Enrich any of the existing use cases handling inbound interactions with the ability to route calls based on WFM schedules. Doing so can help ensure a more-balanced multi-skill workload for agents and improvement in schedule adherence. Routing strategies can route based on the anticipated availability of an agent. For example, interactions are not routed to agents immediately before they are scheduled for a break or a meeting. This improves agent adherence and leads to better customer service and worker efficiency.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Employee Utilization</td>
<td>Enable accurate omnichannel forecasting and scheduling based on skills and schedules through the automated use of historical information and channel specific algorithms and schedule based routing</td>
</tr>
<tr>
<td>Reduced Employee Attrition</td>
<td>Regard agent schedules including break times and shift end through schedule-based routing</td>
</tr>
<tr>
<td>Reduced Handle Time</td>
<td>Allow for more accurate and timely routing to the best agent through optimized scheduling with intelligent routing</td>
</tr>
<tr>
<td>Reduced Overtime Costs</td>
<td>Improve schedule adherence and regard end of shift times through schedule based routing</td>
</tr>
</tbody>
</table>

Summary

Schedule-based routing is a powerful tool enabling contact centers to optimize employee satisfaction while reduce attrition and unnecessary overtime all while providing better coverage.
Use Case Definition
Business Flow
Business Flow Description

1. The customer contacts the company by one of the following channels:
   1. Voice
   2. E-mail
   3. SMS
   4. Social

   • *Alternatively, a new task may be created by a 3rd party source system for distribution by the Genesys system

2. One of the use cases for the corresponding channel, processes the call and determines the skill profile required to handle the interaction.

3. The skill profile is matched with the corresponding activity in WFM

4. Genesys will identify the agents, which are currently scheduled to work on this activity. Cut off times will be taken into account, i.e. an agent shortly before his break will not receive an interaction which usually has a long average handling time.

5. Genesys will check if one of these agents is available. If yes, it will distribute the interaction to this agent

6. If no, Genesys will queue the call until one of these agents becomes available or a time out is reached

7. If the time out is reached, the distribution logic will continue with skill-based routing and subsequent target expansions as defined in the underlying use case.
Business and Distribution Logic

Business Logic

BL1: Activity

It must be possible to match the possible routing targets of the underlying use case (skill expressions) to an activity in WFM. This activity will be used to identify the agent’s schedules.

BL2: Scheduled agents and cut off time

Genesys scans schedules and activities stored in the WFM database periodically (every 15 minutes). This information will be used in Genesys routing decisions. Note that an agent could be working on multiple activities at any given time.

The routing cutoff time is the period that URS stops sending interactions to an agent for the activity when the schedule for a specific activity is about to end. This cutoff time should reflect the duration of a typical interaction and a threshold that an agent can allow an interaction to overlap into the time of the next scheduled activity. For example, if the typical interaction lasts 3 minutes and the threshold is 2 minutes, cutoff time might be the difference between them or 1 minute. URS would no longer send interactions specific to that activity to a particular agent when only 1 minute remains for the agent to spend doing that activity. Cut off times will be configurable by activity.

BL3: Timeout to wait for a scheduled agent

This timeout will be configurable by activity.

Distribution Logic

Full distribution requirements will be included in the underlying use case. The distribution requirement specific for this use case are described in the previous chapters.

User Interface & Reporting?

Agent UI

No additional agent desktop requirements.
Reporting

Real-time Reporting

No additional real-time reporting requirements.

Historical Reporting

Reporting requirements in addition to the reporting functionality of the underlying use cases:
- Number of Interactions which were distributed according to schedule
- Number of Interactions overflowing back to skill based routing

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Genesys Email Routing (CE16)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Genesys Social Media Routing (CE19)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Genesys SMS Routing (CE29)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>None</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inbound</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Genesys Call Routing (CE01)</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>• Genesys Personalized Routing (CE02)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Workforce Engagement</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Genesys Workforce Scheduling for Voice (EE01)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
All of the following required: | At least one of the following required: | Optional | Exceptions
---|---|---|---
• Genesys Omnichannel Workforce Scheduling (EE02)

General Assumptions

• Workforce Management base service (WFM Use Case or Genesys WFM product) already deployed is a pre-requisite.
• Depending on the channels which should be covered with this use case, Inbound or Digital Use Cases is required.
• This use case currently does not support chat as this is not included in the available WFM use cases.
• Use case is not compatible with the functional use case "predictive matching".

Document Version

• Version v 1.0.2 last updated July 12, 2021
Genesys Voice Recording (EE07) for Genesys Engage on premises

Record voice interactions

What's the challenge?

You need to reliably record calls to help agents get better, enhance the customer experience and manage risk. When recordings are not complete or available, you risk being out of compliance and lose valuable information that could be used to improve efficiency and make customers happier.

What's the solution?

Monitor quality to continuously improve performance and experiences. Be compliant. Genesys Voice Recording, natively integrated with the Genesys Customer Experience Platform, reliably records 100% of calls, makes it easy to search and access recordings, and doesn't lose a beat with transfers - even across sites.

Other offerings:
Genesys Engage cloud PureConnect

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 and Distribution Logic
• 5 User Interface & Reporting?
Genesys Voice Recording (EE07) for Genesys Engage on premises

- 5.1 Agent UI
- 5.2 Reporting

- 6 Customer-facing Considerations
  - 6.1 Interdependencies
  - 6.2 Document Version
Use Case Overview

Story and Business Context

Businesses need to reliably record calls to improve customer experience and employee performance, be compliant, and manage risk.

Genesys Interaction Recording is a compliance and control platform that reliably records 100% of calls — even across multiple sites — and makes it easy to search and access recordings regardless of location. Through voice recording, customer service operations can analyze the quality of voice conversations, identify training needs and help to continuously improve the performance of employees. The payoff is a better customer experience.

Fully integrated to the CIM platform, Genesys Interaction Recording provides economies and powerful recording control via a host of integrations across the suite. This powerful solution will enable the modern contact center to record the entire customer interaction, allowing the contact center to meet quality or regulatory compliance requirements.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reduced Deployment Costs</td>
<td>Eliminate the need to purchase additional hardware, software and the associated maintenance and support services through integrated approach with Genesys Interaction Recording</td>
</tr>
<tr>
<td>Reduced Penalties and Fines</td>
<td>Records 100% of calls with no lost calls</td>
</tr>
</tbody>
</table>

Summary

100% voice recording of customer conversations with an agent for compliance and regulatory requirements.

Use Case Definition

Business Flow

The following describes the main actors of the business flow below and their goals:

- The customer makes the call
• The supervisor needs to be able to listen to recordings
• The agent needs to be able to pause/resume recordings
• The Legal and Compliance officer needs to be able to access the system to audit and protect recordings
**Business Flow Description**

Step 1: Customer makes a call to one of the service lines of the company.

Step 2: An announcement will be played to the customer that the call is going to be recorded.

Step 3: The call is handled and routed to an agent following the logic of the Inbound Voice distribution strategy which is implemented for the Service Line. This can be either the use case "Genesys Call Routing (CE01)" or "Genesys Personalized Routing (CE02)". The Inbound Voice routing strategy is not within the scope of this use case.

Step 4: Genesys Interaction Recording starts the recording.

Step 5: Agent answers the call from any desk within the site.

Step 5a: The agent may (if enabled) pause/resume the recording manually via the standard integration with Genesys Workspace when sensitive data needs to be entered.

Step 6: Customer or Agent disconnects the call.

Step 7: Genesys Interaction Recording stops and stores the recording.

Step 8: Supervisor searches for, retrieves and listens to a recording made by one of their agents.

Step 9: Legal and Compliance officer checks the system for compliance and retrieves recordings for legal purposes.

Step 10: Genesys Interaction Recording archives and purges recordings according to the rules defined in the system.
Business and Distribution Logic

Business Logic

Details of the business flow described in the previous chapter depend on how the system will be set up for your environment. This chapter describes the options which are available and how the initial set-up will be done for your environment by Genesys Professional Services within the scope of this Smart use case.

Metadata

Metadata are tags which will be added to the recording and allow precisely targeted interaction search and selection for evaluation and analysis. What data are available depend on the distribution logic implemented in your environment and will be defined with you during the implementation project.

Archiving and Purging Criteria

Recordings can be archived and / or purged from the system after a specified time. After recordings have been purged, they are no longer available for supervisors or compliance officers via the Genesys user interface. The corresponding policies will be configured during the set-up of this use case. Within the scope of this use case, we will set up one set of rules which will be valid for all recorded calls. Archived files are not managed by GIR. It is customer's responsibility to set up lifecycle policy of these archives and purge them after the lifecycle period.

Access Control

Access control to recordings is managed by user roles and associated permissions as well as by the organizational hierarchy defined for the individual agents. The scope of this use case includes default set of roles that can be provided upon request.

Pause / Resume recording

The ability for an agent to pause / resume a recording from his agent desktop will be enabled or disabled based on customer requirements.

Distribution Logic

N/A

User Interface & Reporting?

Agent UI

The agent will have the optional capability to pause/resume a recording when confidential information is passed via the call via his agent desktop.
Reporting

Real-time Reporting
N/A

Historical Reporting

Historical reporting is provided by templates in the SpeechMiner UI (business interface), which is part of Genesys Interaction Recording.

As this is a compliance use-case, it is not relevant how many calls per service/business line/customer segment are recorded. Assumption is that 100% of calls are recorded.

In addition to the historical reporting, Genesys Interaction Recording provides audit logs for recording access. These audit logs contain the following information:

- Who accessed a recording
- Which recording
- When
- Deletions
- Playback requests
- Exports
- Report exports
- Customer ID
- Interaction Type
- Reason Code
- All attached metadata
- Archive and Purging logs

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>Inbound</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>All of the following required:</td>
<td>At least one of the following required:</td>
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<tr>
<td>-------------------------------</td>
<td>-------------------------------------------</td>
<td>----------</td>
<td>------------</td>
</tr>
<tr>
<td></td>
<td>Genesys Call Routing (CE01)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Genesys Personalized Routing (CE02)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

General Assumptions

- The Record Interactions – Base package supports 100% voice recording at the DN level only (no other recording methods).
- Apache is the only load balancer currently supported for GIR.
- GIR MCP’s will not be shared with GVP.
- The following activities are out of scope:
  - Configuration of Network at its final state: SBC, Media Gateways, VLANs, Firewalls, NAT, Trunking services, etc.
  - Configuration or Setup of additional Load Balancer software/hardware (DNS method or other)
  - Load balancing or cluster for API Servers
  - Configuration of External Storage system (e.g. SAN / NAS)
  - Set up of lifecycle policy for archived files
  - Installation of the standard out of the box WDE
  - Customization of other desktop application to enable Dynamic Recording
  - High Availability for the Apache load balancer
  - Provisioning of recordings from other vendors

Document Version

- Version v 1.0.2 last updated July 12, 2021
Genesys Voice and Screen Recording (EE08) for Genesys Engage on premises

Record voice and screen interactions

What's the challenge?

You need to meet contact center compliance and quality needs, within budget and strategy. When complete voice and screen recordings are too expensive, complicated or don't fit your technology vision, that exposes you to unnecessary costs and risks.

What's the solution?

Get end-to-end interaction recordings by capturing calls and screen activity. Genesys Voice and Screen Recording, already available on your Genesys Customer Experience platform, is simple and cost-effective to add, use and manage. Boost quality, reduce risk and help the contact center improve performance.

Other offerings:
Genesys Engage cloud PureConnect

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 and Distribution Logic
• 5 User Interface & Reporting?
• 5.1 Agent UI
• 5.2 Reporting

• 6 Customer-facing Considerations
  • 6.1 Interdependencies
  • 6.2 Document Version
Use Case Overview

Story and Business Context

Recording calls and agent screens is important for quality management purposes. Simultaneous playback of recorded calls and agent screens helps to identify issues with agent efficiency, desktop applications, and to identify the training needs of each agent. This powerful solution will enable the modern contact center to record the entire customer interaction, allowing the contact center to meet quality or regulatory compliance requirements. Genesys provides organizations with reliable, high-quality recordings of both audio communications and related desktop screen activity.

This powerful solution will enable the modern contact center to record the entire customer interaction, allowing the contact center to meet quality or regulatory compliance requirements. Genesys provides organizations with reliable, high-quality recordings of both audio communications and related desktop screen activity.

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:

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</thead>
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<td>Eliminate the need to purchase additional hardware, software and the associated maintenance and support services through integrated approach with Genesys Interaction Recording</td>
</tr>
<tr>
<td>Reduced Penalties and Fines</td>
<td>Record 100% of calls with no lost calls</td>
</tr>
</tbody>
</table>

Summary

100% voice recording of customer conversations for compliance and regulatory requirements, with a sub-selection of screens being recorded.
Use Case Definition
Genesys Voice and Screen Recording (EE08) for Genesys Engage on premises

Business Flow
**Business Flow Description**

Step 1: Customer makes a call to one of the service lines of the company.

Step 2: The IVR announces that the call is going to be recorded.

Step 3a: The call is handled and routed to an agent following the logic of the Inbound Voice distribution strategy which is implemented for the Service Line. This can be one of the existing Inbound Voice use cases (please see the documents of these use cases for more detail). The Inbound Voice routing strategy is not within the scope of this use case.

Step 3b: Based on a percentage, which is set in Genesys by the administrator, it is determined if the screen needs to be recorded.

Step 4a: Genesys Interaction Recording starts the voice recording.

Step 4b: If in Step 3b, it is determined that the screen needs to be recorded, Genesys will start screen recording as soon as the agent answers the call.

Step 5: The agent can answer the call from a single, dedicated desk within the site (product limitation).

Step 5a: The agent may (if enabled) pause/resume the recording manually via the standard integration with Genesys Workspace when sensitive data needs to be entered. This pauses both voice and screen recording.

Step 6: Customer or agent disconnects the call.

Step 7: Genesys Interaction Recording stops the voice recording. Screen recording will be stopped after the ACW period has ended.

Step 8: Genesys uploads the screen recording files to the central system immediately, or at configured intervals.

Step 9: Genesys Interaction Recording combines audio and screen into single files.

Step 10: Supervisor searches for, retrieves and listens to a recording made by one of their agents.
Step 11: Legal and Compliance officer checks the system for compliance and retrieves recordings for legal purposes.

Step 12: Quality Manager searches for, retrieves and listens to recordings to use in agent evaluations.

Step 13: Genesys Interaction Recording archives and purges recordings according to the rules configured.

Business and Distribution Logic

Business Logic

Parameters and Business Rules

Details of the business flow described in the previous chapter depend on how the system will be set up for your environment. This chapter describes the options which are available and how the initial set-up will be done for your environment by Genesys Professional Services within the scope of this Smart use case.

Metadata

Metadata are tags which will be added to the recording and allow precisely targeted interaction search and selection for evaluation and analysis. What data are available depend on the distribution logic implemented in your environment and will be defined with you during the implementation project. Genesys Professional Service will configure up to 10 metadata elements within the scope of this use case.

Archiving and Purging Criteria

Recordings can be archived and/or purged from the system after a specified time. After recordings have been purged, they are no longer available for supervisors or compliance officers via the Genesys user interface. The corresponding policies will be configured during the set-up of this use case. Within the scope of this use case, we will set up one set of rules which will be valid for all recorded calls. Archived files are not managed by GIR. It is customer's responsibility to set up lifecycle policy of these archives and purge them after the lifecycle period.

Access Control

Access control to recordings is managed by user roles and associated permissions as well as by the organizational hierarchy defined for the individual agents. The scope of this use case includes default set of roles that can be provided upon request.

Pause / Resume recording

The ability for an agent to pause/resume a recording from his agent desktop will be enabled or disabled based on customer requirements.

Screen Recording Percentage

Screen recording will be done for a percentage of calls only. The system will be set up with a fixed percentage. Audio will be recorded in 100% of the cases.
Distribution Logic

N/A

User Interface & Reporting?

Agent UI

- The agent will have the optional capability to pause/resume a recording when confidential information is passed via the call via his agent desktop.
- The Screen Recording Service is installed on the agent's desktop by IT.

Reporting

Real-time Reporting

N/A

Historical Reporting

Historical reporting is provided by templates in the SpeechMiner UI (business interface), which is part of Genesys Interaction Recording.

In addition to the historical reporting, Genesys Interaction Recording provides audit logs for recording access. These audit logs contain the following information:

- Who accessed a recording
- Which recording
- When
- Deletions
- Playback requests
- Exports
- Report exports
- Customer ID
- Interaction Type
- Reason Code
- All attached metadata
- Archive and Purging logs
Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>Inbound</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>• Genesys Call Routing (CE01)</td>
<td>None</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Genesys Personalized Routing (CE02)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

General Assumptions

• The Record Voice and Screen Interactions Use Case supports 100% voice recording at the DN level only (no other recording methods).

• Apache is the only load balancer currently supported for GIR.

• GIR MCP’s will not be shared with GVP

• The following activities are out of scope:
  • Configuration of Network at its final state: SBC, Media Gateways, VLANs, Firewalls, NAT, Trunking services, etc.
  • Configuration or Setup of additional Load Balancer software/hardware (DNS method or other)
  • Load balancing or cluster for API Servers
  • Load balancing for SpeechMiner UI
  • Configuration of External Storage system (e.g. SAN / NAS)
  • Set up of lifecycle policy for archived files
  • Installation of the standard out of the box WDE/WWE beyond those for initial testing
  • Installation of the standard out of the box WDE/WWE
  • Customization of other desktop application to enable Dynamic Recording
  • High Availability for the Apache load balancer
  • Provisioning of recordings from other vendors

• The only supported desktops for GIR with Screen Recording is Workspace Desktop Edition and Workspace Web Edition
Document Version

- Version version 1.0.2 last updated July 12, 2021
Genesys Quality Management (EE09) for Genesys Engage on premises

Improve employee performance with quality management

What's the challenge?

Businesses need to evaluate the quality of their interactions to identify opportunities for improvement, but it's not efficient to evaluate every single interaction. You need a way to distinguish important from routine interactions, and then generate the results in a consistent and automated manner.

What's the solution?

Genesys Quality Management includes strategic metadata with each recorded interaction to pinpoint which are most valuable to evaluate, and then uses predefined reports to analyze and present those results for a clear and consistent view of where you're strong and where you could improve.

Other offerings:
Genesys Engage cloud PureConnect

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 and Distribution Logic
• 5 User Interface & Reporting?
• 5.1 Agent UI
• 5.2 Reporting

• 6 Customer-facing Considerations
  • 6.1 Interdependencies
  • 6.2 Document Version
Use Case Overview

Story and Business Context

Quality Management (QM) helps organizations move beyond random sampling to gain a deeper understanding of its agent/customer interactions by monitoring, evaluating, and studying customer interactions. Quality Management not only helps organizations identify agents who underperform, but it also helps them identify the root cause of an agent's behavior.

By understanding agent performance and productivity at a granular level, Quality Management offers insight into customer interactions and ways in which agents can improve them. That is, Quality Management offers insight that can increase employee productivity, resolve future customer disputes and subsequently enhance customer service. It enables you to ensure consistent and professional service.

The QM module is a tool that helps organizations improve agent productivity as well as customer satisfaction. The key features such as Forms Manager and Evaluations Manager can be utilized for evaluating agent productivity, as well as targeted agent training. These features allow easy detection and training of agents who do not adhere to compliance or specified procedures.

Quality Management key features include:

- **Forms Manager**: Enables you to create feedback forms to use when evaluating your contact center agents.
- **Evaluations Manager**: Enables you to create evaluations to monitor your agent's productivity and efficiency.
- **Evaluation Sessions**: Provides a list of existing evaluation sessions.
- **Reports**: Enables you to monitor agent or evaluator progress using predefined reports, identify areas for training, and calibrate evaluator responses to limit evaluation variations.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Customer Experience</td>
<td>Deliver a better customer experience with tools that make the process of finding the root causes of low NPSs more efficient and effective as the entire conversation, including self-service and transfers, may be recorded and archived for later review (the agent manually transcribes only critical fields). The result is less time spent handling the call (AHT) and after-call-work (ACW), improved accuracy and customer care, and more effective training and compliance management</td>
</tr>
<tr>
<td>Improved Employee Satisfaction</td>
<td>Develop agent expertise and knowledge through coaching resulting in performance improvement and increased job satisfaction</td>
</tr>
</tbody>
</table>

Genesys Engage On-premises Use Cases
## Use Case Benefits

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved First Contact Resolution</td>
<td>Find the root causes of low FCRs efficiently and effectively through targeted evaluations</td>
</tr>
<tr>
<td>Increased Revenue</td>
<td>Improve Sales or Collections by identifying the critical agents skills within interactions that lead to successful outcomes and subsequently train and coach lower performers through targeted or ad-hoc evaluations with Genesys Quality Management.</td>
</tr>
<tr>
<td>Reduced Handle Time</td>
<td>Conduct more targeted evaluations, making the process of finding the root causes of high handle time more efficient and effective through native integration into the Genesys Customer Experience Platform</td>
</tr>
</tbody>
</table>

## Summary

After a call is recorded, it's time to perform a quality evaluation by choosing one of the following two methods:

- **Ad-Hoc Evaluations** - allow users to pick and choose which calls they want to evaluate, along with any relevant evaluation forms.
- **Targeted Evaluations** - leveraging any Genesys metadata, users can predefine which calls needs to be evaluated and by whom within a configurable timeframe.

## Use Case Definition

**Business Flow**

*Business flow*
**Business Flow Description**

Business flow steps to follow are attached to defining how measurement will be targeted to come to an efficient scoring and planning of review sessions and have a proper display setup of performance results and review progress made.

1. **Set up Users.**
   The IT Administrator sets up user roles and a related set of permissions. Standard users include:
   - Admin
   - Form Designer
   - Evaluation Planner
   - Evaluation Reviewer
   - Supervisor

2. **Set up Question Library:**
   The form designer sets up a question library to be used in evaluation forms and creates the following:
   - categories
   - questions
   - answers
   - scoring type

3. **Create Form by selecting Library questions.**
   The form designer creates a form by selecting the appropriate library questions, together with the model of scoring where low performers and high performers can be identified within a certain threshold.

4. **Plan Evaluation and Calibration.**
   The evaluation planner plans review sessions for CC sites, groups, or individual agents. He decides how many interactions need to be scored per month/week/day, setting a quota where it is recommended to start small to test reviews, such as two calls per agent/week based on metadata criteria (such as longer than 3 minutes) and concerning a specific call reason. Keep in mind that random is not possible and needs an interaction criteria set up for each planned review. Detailed tasks include:
• Attach Forms.
• Attach Evaluators.
• Select interactions.
• Specify scheduling (of recurrence, if any).
• Activate schedule.

5. Select an evaluation session.
   The evaluation planner or supervisor proceeds with the actual reviews for the teams he is allowed to review and give feedback for, insight in how many reviews need to take place and what has been done, and what is in progress or still pending. Detailed actions include:
   • Select interaction.
   • Play back interaction.
   • Score session.
   • Save scored session.

6. Create an action item.
   • The evaluator sends out an action item containing the completed evaluation, along with any relevant feedback to the agent.
   • Agent reviews action item.
   • Agent reviews evaluation received, providing any additional comments back to the evaluator.

7. Using the available report templates/widgets, the evaluator sets up a performance view to monitor the progress of team performance and individual agent performance views.

Business and Distribution Logic

Business Logic

Details of the business flow described in the previous chapter depend on how the system is set up for your environment and how your team defines the details. This section describes the tools used to define the business logic.

Form Manager

With the Quality Management - Forms Manager you can create and manage forms that enable evaluators to provide feedback about a specific agent. That is, when a form is included in an evaluation, it becomes part of a
process that helps you identify how an agent is functioning, and subsequently what the agent needs to do in order to maximize your business goals and customer satisfaction.

Evaluation Manager

Quality Management evaluations are the best way to evaluate and improve agent behaviors that support your business goals. They drive the behaviors that promote a specific agenda by enabling you to assess how well your agents are performing during customer interactions.

Evaluation Sessions

To help ensure that an agent's participation in an interaction coincides with a specific business agenda, SpeechMiner Quality Management evaluators receive a list of evaluation sessions that they must fill out according to a configurable schedule. A completed evaluation session provides a view into how an agent communicates with consumers. Such evaluation sessions provide consistent and regular feedback that helps surface insightful reports, comments, and suggestions that can lead to formal skills training and action plans to improve an agent's performance. In addition, ad-hoc evaluations can be performed by selecting individual interactions.

Action Items creates an environment where evaluators and agents can communicate, leveraging alerts informing when evaluations are completed or acknowledged.

Reports

Reports are summaries and analyses of interaction, speech, and external metadata. You can generate reports for analysis, view report details and status, and share the data with users throughout the enterprise. You can view reports in your browser, print them, or send them via email. To help you monitor your business, SpeechMiner offers a wide range of standard reports that can be customized to better suit your needs. Depending on the type of report, the results may be presented as lists or data and/or in graphic form. In some reports, you can drill down to see additional details.

Parameters and Business Rules common flow

The following needs to be set up to support the Quality Management process:

1. IT Admin to set up Users, Role-based access rights, and additional metadata configuration.
2. Set up a Question Library:
   - Define the measurement based on categories.
   - Define question types (such as multiple choice, yes/no) and number of questions.
   - Define actual answers, and the number of answers.
   - Define Weighting of the scoring type.
3. Create Form: Define name, description, create categories, and insert questions from Library.
4. Plan Evaluation and Calibration:
   - Choose New Evaluation Type: Distribution, Calibration, Shared
   - Interactions - date range, metadata, agents, ixn type, ixn duration, number of ixns for evaluation
   - Scheduling - one time, or recurrence (by minute, hour, days, weeks, months,) schedule series expiry (after minute, hour, days, weeks, months.) Date range of start and finish of scheduling.
• Activate schedule.

5. Select an evaluation session:
   • Select review session, playback interaction, and score by assigned forms.
   • Save to be included in performance results.

6. Create reports by templates:
   • Select template and user type and assign relevant data.
   • Save to report library or dashboard.
   • Create subscriptions for feedback reports.

Distribution Logic

Creation by Supervisor, Team leaders, Quality Managers to publish reports by subscriptions of feedback by email.

User Interface & Reporting?

Agent UI

In case there is need of screen recording (Premise only), the use case is a prerequisite and a desktop client needs to be deployed on each workstation.

Reporting

Real-time Reporting

NA

Historical Reporting

Speechminer report templates enable you to create a dashboard display to address:

• What the actual state of planned review sessions and the remaining target?
• What are the actual scoring results per site/team/agent?
• Is scoring done similarly by reviewers to assure scoring standards?

QM Report templates include:

• Planning/Quota progress report
• Quality Performance report
• Feedback results report to inform agents
• Supervisor Calibration report
Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>Workforce Engagement</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>• Genesys Voice Recording (EE07)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Genesys Voice and Screen Recording (EE08)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

General Assumptions

• Recording is set up in full detail and metadata relevancy is sorted out.

• Understanding of the business QA process:
  • Scoring quotas/targets and planning criteria are known.
  • Scoring thresholds are known, such as 60% minimum 90% excellent.
  • Scoring categories are defined, such as greeting, knowledge, behavior.
  • Scoring question types are defined, such as multiple choice and pass/fail.
  • Scoring answers follows a business standard like 2,3,4, answers plus free text.
  • Preferred output is defined, such as how to display what has been measured.

• Regulatory issues: with every project it is highly recommended to discuss local restrictions related to compliance, data protection, and any special regulations, to make sure that access to interactions and permission to review is understood in full detail.
Empower employees with self-administration of their schedule

What's the challenge?

As millennials make up more of your workforce, they want more control in their lives and want to easily self-manage their schedules. Managers want to reduce the time it takes to manage this process as long as the contact center runs efficiently.

What's the solution?

Give employees the control they want. The right web application empowers employees to self-manage their schedules through business rules. Employees can request time off, submit schedule preferences, and manage exceptions — without going through a supervisor or planner.

Other offerings:
Genesys Engage cloud PureConnect

Contents

• 1 What's the challenge?
• 2 What's the solution?
• 3 Use Case Overview
  • 3.1 Story and Business Context
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• 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
  • 6.2 Document Version
Use Case Overview

Story and Business Context

This use case focuses on operational efficiency and employee empowerment through automated time-off processing, featuring:

- Time-off balance is automatically calculated and recalculated when supervisors or agents update time-off.
- The time-off balance for each agent is automatically calculated at the beginning of every time-off year and when the date associated to a time-off rule is reached.
- Control of the number of agents on time off in the time-off limits.
- Time-off tracking to support shrinkage calculations applied to the staffing forecasts. This use case provides the following business benefits:

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Employee Satisfaction</td>
<td>Empower employees through the ability to self-manage time-off requests against predetermined business operational rules</td>
</tr>
<tr>
<td>Reduced Administration Costs</td>
<td>Reduce operational planning time by decreasing the effort of approving and managing time-off requests</td>
</tr>
</tbody>
</table>

Summary

Employees can self-manage their time off, controlled through business rules.

Use Case Definition

Business Flow

(1) Supervisor flow

The following diagrams show the business flow of the use case.
Business Flow Description Supervisor Flow

1. Base configuration complete (Use Case EE01).
2. Supervisor logs into Web Supervisor application and navigates to Calendar > Time Off Limits.
3. Supervisor enters values for Time Off Limits (void = unlimited).
4. Supervisor navigates to Policies > Time Off Types.
5. Supervisor configures Time Off Types and associates with Schedule State Groups.
7. Supervisor creates Time Off Rules to calculate time-off balance (usually based on agent’s contract).
8. Supervisor assigns Time Off Rules to agents with an effective start date (end date is populated automatically by the system).
9. Several Time Off Rules can be assigned to each agent, mirroring their career path and possible increased entitlement.
10. Agent creates new request in Web Agent application outside of published schedule dates.
11. Time off is automatically granted, provided that the agent has enough hours remaining and the Time Off Limits have not been met.
12. WFM Builder automatically picks up the time-off request during the schedule build for the appropriate dates.
Business Flow

(2) Agent flow
Business Flow Description Agent Flow

1. Agent creates a new request in the Web Agent application within the published schedule dates.
2. Settings previously configured in WFM Application Options determine whether the time-off request is automatically processed in the published schedule.
3. Time off is pushed to WFM Calendar in Preferred status, providing that the agent has enough hours remaining and the Time Off Limits have not been met.
4. If auto-approval in published schedule is not enabled, supervisor navigates to WFM Calendar and filters on Time Off entries.
5. Supervisor grants/declines time-off requests based on business criteria.
Business and Distribution Logic

Business Logic

Time-off rules, limits, and configuration is specific to the customer, vertical, region, and country laws, and so can vary widely. However, the base requirements are:

- Time-Off Limit Values
- Time-Off Types
- Application of Time-Off Rules to Time-Off Types
- Enabling of time-off self-management

Distribution Logic

N/A

User Interface & Reporting?

Agent UI

Agents access the WFM Web Agent UI with a supported browser. There is no Java in this UI. See Supported Operating Environment Guide for specific browser support.

Reporting

Real-time Reporting

N/A

Historical Reporting

The Genesys Workforce Management product contains a number of out-of-the-box historical reporting elements. Details can be found in the Workforce Management Administrator Guide.

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 | **Workforce Engagement**
  • Genesys Workforce Scheduling for Voice (EE01)
  • Genesys Omnichannel Workforce Scheduling (EE02)
  • Genesys Back-office Scheduling (EE26) | None | None

General Assumptions

**Assumptions for PureConnect customers running Genesys Workforce Management**

PureConnect Platform Assumptions:

The dependency use case covers the PureConnect Platform-specific assumptions. Please be advised that Genesys Back office Scheduling (EE26) is currently not a dependency for this use case for PureConnect. The prerequisites for this use case on PureConnect are Genesys Workforce Management for Voice (EE01) and Genesys Omnichannel Workforce Scheduling (EE02)

  • PureConnect GWFM Connector is required to utilize Genesys WFM on PureConnect

**Other Assumptions**

The customer has the requirement or desire to use this element of advanced WFM. The Inbound Voice use case is a pre-requisite of the base WFM package, including the definition of Queues, Stats, Agents & Skills. Because the WFM Web Supervisor uses Java, both JRE and Tomcat are requirements. See Supported Operating Environment Guide for specific versions.

**Customer Responsibilities**

Schedule State Groups are configured to meet business requirements regarding Time-Off Types.

**Document Version**

  • Version v 1.2.3 last updated July 12, 2021
Genesys Employee Schedule Preferences (EE10-B) for Genesys Engage on premises

Important
This use case supports Genesys Engage and PureConnect as the WFM product is supported to run on both platforms.

Empower employees with self-administration of their schedule

What's the challenge?
As millennials make up more of your workforce, they want more control in their lives and want to easily self-manage their schedules. Managers want to reduce the time it takes to manage this process as long as the contact center runs efficiently.

What's the solution?
Give employees the control they want. The right web application empowers employees to self-manage their schedules through business rules. Employees can request time off, submit schedule preferences, and manage exceptions — without going through a supervisor or planner.

Other offerings:
Genesys Engage cloud PureConnect

Contents
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  • 5.1 Agent UI
  • 5.2 Reporting

• 6 Customer-facing Considerations
  • 6.1 Interdependencies
  • 6.2 Document Version
Use Case Overview

Story and Business Context

This use case focuses on operational efficiency and employee empowerment through enabling employees to request and drive their own shift exceptions, optimizing both employee satisfaction and business operational needs. The use case features:

- The ability for an agent to enter an exception into the published schedule.
- Labor-saving as agents enter exceptions that would otherwise be entered by supervisors.
- Agent empowerment, allowing agents to enter items into their own schedules.
- Supervisor control, as customers can decide whether the agent-initiated exception is pushed directly to the master schedule or is if it requires supervisor approval prior to appearing in the schedule.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Employee Satisfaction</td>
<td>Allow employees to have more say in their schedule</td>
</tr>
<tr>
<td>Improved Employee Utilization</td>
<td>Eliminate the need for the planner to process these requests</td>
</tr>
<tr>
<td>Reduced Administration Costs</td>
<td>Allow business users to specify the types of exceptions that be requested from employees</td>
</tr>
</tbody>
</table>

Summary

Deliver the capability for an employee to enter exceptions (offline activities) into their schedule via the Workforce Management User Interface without the need to supervision or effort on the planner's behalf.

Use Case Definition

Business Flow

The following diagram shows the business flow of the use case:
Business Flow Description

1. Base configuration complete (use case EE01, EE02, or EE26).

2. In Web Agent application, user navigates to Add Exception.

3. Agent selects how she wants to schedule the exception:
   - Best fit/optimized
   - Specific time/date

4. If supervisor approval is required, the supervisor navigates to Master Schedule Changes Approval view and approves/declines the agent-initiated exception.

5. Exception is visible to agents and supervisors in the master schedule.

6. If the supervisor declines the request it appears as declined in the master schedule view.
Business and Distribution Logic

Business Logic

The following business capabilities need to be in place to allow this capability to be of benefit:

- Defined rules and decisions on which exceptions employees can use.
- Confirmation from the business on the operating procedures of such exceptions.

Distribution Logic

N/A

User Interface & Reporting?

Agent UI

Agents access the WFM Web Agent UI with a supported browser. There is no Java in this UI. See Supported Operating Environment Guide for specific browser support.

Reporting

Real-time Reporting

N/A

Historical Reporting

The Genesys Workforce Management product contains a number of out-of-the-box historical reporting elements. Details can be found in the Workforce Management Administrator Guide.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
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<tr>
<th>All of the following required:</th>
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All of the following required:  | At least one of the following required:  | Optional  | Exceptions
---|---|---|---
**Workforce Engagement**
- Genesys Workforce Scheduling for Voice (EE01)
- Genesys Omnichannel Workforce Scheduling (EE02)
- Genesys Back-office Scheduling (EE26)

---

**General Assumptions**

**Assumptions for PureConnect customers running Genesys Workforce Management**

PureConnect Platform Assumptions:

Supervisor has a user role allowing access to Exceptions. In Web Supervisor application > Policies > Exception Types:

- check 'Agent-Initiated' to enable the functionality
- enter optional start/end dates if required
- PureConnect GWFM Connector is required to utilize Genesys WFM on PureConnect

Please be advised that Genesys Back office Scheduling (EE26) is currently not a dependency for this use case for PureConnect. The prerequisites for this use case on PureConnect are Genesys Workforce Management for Voice (EE01) and Genesys Omnichannel Workforce Scheduling (EE02) Additional assumptions which are included in the dependency use cases cover the PureConnect Platform-specific assumptions.

**Other Assumptions**

The customer has the requirement or desire to use this element of advanced WFM. The Inbound Voice use case is a pre-requisite of the base WFM package, including the definition of Queues, Stats, Agents & Skills. Because the WFM Web Supervisor uses Java, both JRE and Tomcat are requirements. See Supported Operating Environment Guide for specific versions.

**Customer Responsibilities**

This use case should be considered only if the business intends to allow agents to have a say in how their schedules get built.
Genesys Employee Schedule Preferences (EE10-C) for Genesys Engage on premises

**Important**
This use case supports Genesys Engage and PureConnect as the WFM product is supported to run on both platforms.

Empower employees with self-administration of their schedule

**What's the challenge?**
As millennials make up more of your workforce, they want more control in their lives and want to easily self-manage their schedules. Managers want to reduce the time it takes to manage this process as long as the contact center runs efficiently.

**What's the solution?**
Give employees the control they want. The right web application empowers employees to self-manage their schedules through business rules. Employees can request time off, submit schedule preferences, and manage exceptions — without going through a supervisor or planner.

**Other offerings:**
Genesys Engage cloud PureConnect

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5 User Interface & Reporting?
   5.1 Agent UI
   5.2 Reporting

6 Customer-facing Considerations
   6.1 Interdependencies
   6.2 Document Version
Use Case Overview

Story and Business Context

This use case focuses on operational efficiency and employee empowerment by enabling employee shift preferences and optimizing both employee satisfaction and business operational needs. The Workforce Management schedule builder can optionally consider agent preferences for individual days when building schedules. Agents can enter preferences for shifts, days off, availability, and time off using WFM Web for Agents. Supervisors can enter agent preferences in Workforce Management Web for Supervisors and, with the appropriate security permissions, can grant or reject preferences. If a supervisor grants a preference, the calendar algorithm considers that agent’s preference when building the schedule, along with various other criteria such as seniority.

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:

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<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Employee Satisfaction</td>
<td>Empower employees through the ability to self-manage their preference requests against pre-determined business operational rules</td>
</tr>
<tr>
<td>Reduced Administration Costs</td>
<td>Reduce operational planning time by a decrease in effort to approve and manage preference requests</td>
</tr>
</tbody>
</table>

Summary

Deliver the capability for an employee to self-manage their schedule preference requirements within the Workforce Management product, controlled through business rules.

Use Case Definition

Business Flow

The following diagram shows the business flow of the use case:
**Business Flow Description**

**AGENT**

1. Agent logs into WFM Web Agent UI and navigates to the Preferences tab.
2. Agent selects desired preferences:
   - Shift
   - Availability Pattern
   - Day Off

**SUPERVISOR**

1. Supervisor logs into the WFM Web Supervisor UI and navigates to the Schedule Scenario view.
2. Supervisor invokes the Schedule Build Wizard and selects the Preference Fulfillment option for the desired site(s).
3. Supervisor adjusts preference fulfillment options until the desired balance between coverage and percentage of granted preferences is met (might require multiple rebuilds).
4. Supervisor publishes the master schedule.
5. Granted preferences visible in WFM Web Agent Schedule view.
6. Supervisor can optionally add preferences for an agent in the Calendar view.
7. Optionally, Supervisors can produce the Calendar Items Report to show granted preferences.
Business and Distribution Logic

Business Logic

The ability to set preferences relies on the underlying contract and shift configuration configured for each business unit, site, team, and employee.

Distribution Logic

N/A

User Interface & Reporting?

Agent UI

Agents access the WFM Web Agent UI with a supported browser. There is no Java in this UI. See Supported Operating Environment Guide for specific browser support.

Reporting

Real-time Reporting

N/A

Historical Reporting

The Genesys Workforce Management product contains a number of out-of-the-box historical reporting elements. Details can be found in the Workforce Management Administrator Guide.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>Workforce Engagement</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>
All of the following required:            At least one of the following required:                   Optional      Exceptions

- Genesys Workforce Scheduling for Voice (EE01)
- Genesys Omnichannel Workforce Scheduling (EE02)
- Genesys Back-office Scheduling (EE26)

General Assumptions

• WFM Application settings are detailed in the functional design document.

Assumptions for PureConnect customers running Genesys Workforce Management

PureConnect Platform Assumptions:

The dependency use case covers the PureConnect Platform-specific assumptions.

Please be advised that Genesys Back office Scheduling (EE26) is currently not a dependency for this use case for PureConnect. The prerequisites for this use case on PureConnect are Genesys Workforce Management for Voice (EE01) and Genesys Omnichannel Workforce Scheduling (EE02)

• PureConnect GWFM Connector is required to utilize Genesys WFM on PureConnect

Other Assumptions

The customer has the requirement or desire to use this element of advanced WFM. The Inbound Voice use case is a pre-requisite of the base WFM package, including the definition of Queues, Stats, Agents & Skills. Because the WFM Web Supervisor uses Java, both JRE and Tomcat are requirements. See Supported Operating Environment Guide for specific versions.

Customer Responsibilities

Consider configuring shift names that have meaning to agents so they are clear on what they are selecting.

Document Version

• Version v 1.1.3 last updated July 12, 2021
Genesys Employee Schedule Preferences (EE10-D) for Genesys Engage on premises

Important
This use case supports Genesys Engage and PureConnect as the WFM product is supported to run on both platforms.

Empower employees with self-administration of their schedule

What's the challenge?

As millennials make up more of your workforce, they want more control in their lives and want to easily self-manage their schedules. Managers want to reduce the time it takes to manage this process as long as the contact center runs efficiently.

What's the solution?

Give employees the control they want. The right web application empowers employees to self-manage their schedules through business rules. Employees can request time off, submit schedule preferences, and manage exceptions — without going through a supervisor or planner.

Other offerings:
Genesys Engage cloud PureConnect

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
  • 6.2 Document Version
Use Case Overview

Story and Business Context

Within any organization, it is inevitable that employees will need to start their daily shift later than planned or leave for the day earlier than planned, for a variety of reasons (such as lateness, doctor’s appointment, or illness).

The Lateness Payback feature of the Genesys Workforce Management solution allows a supervisor or an employee to input the period of time for which they will need to be absent, due to starting later or leaving earlier than planned. This time can now be made up by arriving earlier, departing later, or reducing the length of the employee’s meal for the affected day or a future day.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Employee Satisfaction</td>
<td>Empower employees by enabling individual schedule adjustments. Prevent unexpected events from impacting employee’s business obligations</td>
</tr>
<tr>
<td>Reduced Administration Costs</td>
<td>Reduce manual schedule intervention for planners and supervisors</td>
</tr>
</tbody>
</table>

Summary

Supervisors and employees can now insert unpaid, part-day exceptions into schedules to indicate missed work time and insert work intervals into schedules to pay back or recoup it.

Use Case Definition

Business Flow

The following diagram shows the business flow of the use case:
**Business Flow Description**

**Supervisor:**

1. Supervisor is notified by employee of upcoming or current lateness/early-departure occurrence with desire for payback.

2. Supervisor opens Schedule Intraday view and locates the relevant employee schedule for the date in question.

3. Supervisor inserts Exception with Payback into the employee's schedule.

4. Supervisor selects the Exception and start and end time to be used to represent the lateness period.

5. Supervisor selects the Marked Time type to represent the payback period.

6. Supervisors select method of payback and date and time frame:
   - Add work to start/end of shift
   - Reduce length of meal on a specific date

7. Supervisor saves schedule.
Business Flow

The following diagram shows the business flow of the use case:
Business Flow Description Agent:

1. Employee becomes aware of upcoming or current lateness/early-departure occurrence with desire for payback.

2. In the Schedule view of the WFM Agent Web interface, the employee selects "Add Exception with Payback" for the relevant day where lateness/early-departure is needed.

3. Employee selects Shift Used For Exception.

4. Employee selects the exception and start and end time to be used to represent the lateness period.

5. Employee selects the Marked Time type to represent the payback period.

6. Employee selects the method of payback and date and time frame:
   - Add work to start/end of shift
   - Reduce length of meal on a specific date

7. Employee submits lateness/early-departure payback.
Business and Distribution Logic

Business Logic

Marked Time types representing lateness payback time need to be configure with the "Use to Mark Payback" option selected.

Exceptions to be used to define the lateness/early-depature itself must be configured in accordance with:

- Unpaid
- Partial Day
- Breaks-over-Exceptions are NOT allowed
- Agent Initiated selected with NO date range defined

Distribution Logic

N/A

User Interface & Reporting?

Agent UI

Agents access the WFM Web Agent UI with a supported browser. There is no Java in this UI. See Supported Operating Environment Guide for specific browser support.

Reporting

Real-time Reporting

N/A

Historical Reporting

The Genesys Workforce Management product contains a number of out-of-the-box historical reporting elements. Details can be found in the Workforce Management Administrator Guide.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.
### General Assumptions

**Assumptions for PureConnect customers running Genesys Workforce Management**

Genesys Workforce Management v8.5.206 or higher

PureConnect Platform Assumptions:

The dependency use case covers the PureConnect Platform-specific assumptions.

Please be advised that Genesys Back office Scheduling (EE26) is currently not a dependency for this use case for PureConnect. The prerequisites for this use case on PureConnect are Genesys Workforce Management for Voice (EE01) and Genesys Omnichannel Workforce Scheduling (EE02)

- PureConnect GWFM Connector is required to utilize Genesys WFM on PureConnect

**Other Assumptions**

The customer has the requirement or desire to use this element of advanced WFM. The Inbound Voice use case is a pre-requisite of the base WFM package, including the definition of Queues, Stats, Agents & Skills. Because the WFM Web Supervisor uses Java, both JRE and Tomcat are requirements. See Supported Operating Environment Guide for specific versions.

### Document Version

- Version v 1.1.2 last updated July 12, 2021
Empower employees to influence their schedules

What's the challenge?
As millennials make up more of your workforce, they want more control in their lives and a way to easily influence their schedules. Managers want to reduce the time it takes to manage this process as long as the contact center runs efficiently.

What's the solution?
Supervisors manage specific employees who can choose shifts or schedule they want while managing the operation of the contact center.

Other offerings:
Genesys Engage cloud PureConnect

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
Genesys Shift Bidding (EE11) for Genesys Engage on premises

- 4 Use Case Definition
  - 4.1 Business Flow
  - 4.2 Business and Distribution Logic
- 5 User Interface & Reporting?
  - 5.1 Agent UI
  - 5.2 Reporting
- 6 Customer-facing Considerations
  - 6.1 Interdependencies
  - 6.2 Document Version
Use Case Overview

Story and Business Context

This use case focuses on operational efficiency and employee empowerment through enabling the employee shift bidding process. In this process, planners build employee profiles rather than individual employee schedules. Once schedules are created, the employees are asked to populate their individual profiles with their preferred shift combinations.

Contrary to the use of rotating patterns and agent shift preferences, Workforce Management Schedule Bidding allows supervisors to build schedules based on the best coverage available within the pre-defined business rules, constraints, and labor laws. The supervisor controls which agents can bid on schedules and the dates available for bidding, allowing for complete operational control.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Employee Satisfaction</td>
<td>Empower employees by allowing them to self-manage their schedules against pre-determined profiles that correspond with their contractual and shift obligations. Allow employees to select profile schedules based on their personal preferences</td>
</tr>
<tr>
<td>Reduced Administration Costs</td>
<td>Allow workforce planners to build employee profiles based on operational requirements to assist with overall scheduling needs. Reduce operational planning time by decreasing effort associated with approval and management of schedule requests</td>
</tr>
<tr>
<td>Reduced Penalties and Fines</td>
<td>Generate ideal schedules whilst adhering to business rules and labor laws</td>
</tr>
</tbody>
</table>

Summary

Provides the capability for workforce planning teams to generate schedules based on profiles of their configured employees. Once generated, these profiles can be pushed to the employee for preference selection.
Use Case Definition

Business Flow

The following diagram shows the business flow of the use case:
Business Flow Description

1. Base Configuration Complete (Use Case EE01).
2. Supervisor creates Profiles in the WFM Contracts.
3. Supervisor assigns skills to the profiles related to real agent skill sets/WFM activities.
4. Supervisor creates a Bidding schedule scenario selecting Profile Agents.
5. Supervisor builds schedule containing Profile Agents for optimum coverage.
6. Supervisor selects which agents can bid on the schedule and enters open/close times for the Bidding period.
7. The Profile Schedules are now available for agents to bid on.
8. Agents enter values associated with the schedules they most / least want to work.
9. The Bidding time expires, and agents can no longer bid on the schedule.
10. Supervisor can optionally assign a real agent to a profile schedule.
11. Supervisor auto-assigns agents to schedules.
12. Supervisor can optionally activate Seniority and/or Rank.
Business and Distribution Logic

Business Logic

The ability to create profiles relies on the underlying contract and shift configuration configured for each business unit, site, team, and employee.

Bidding is available for one-week schedules, allowing agents to select a group of shifts over a given period.

The supervisor user role has the following access:

- WFM Policies > Contracts > Profiles
- WFM Configuration > Agents > Activities & Skills
- WFM Schedules > full access

Contract Profiles are created with the appropriate skill assigned to provide optimum coverage and relation to real agents.

Distribution Logic

N/A

User Interface & Reporting?

Agent UI

Agents access the WFM Web Agent UI with a supported browser. There is no Java in this UI. See Supported Operating Environment Guide for specific browser support.

Reporting

Real-time Reporting

N/A

Historical Reporting

The Genesys Workforce Management product contains a number of out-of-the-box historical reporting elements. Details can be found in the Workforce Management Administrator Guide.
Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required</th>
<th>At least one of the following required</th>
<th>Optional</th>
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</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>Workforce Engagement</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>

- Genesys Workforce Scheduling for Voice (EE01)
- Genesys Omnichannel Workforce Scheduling (EE02)
- Genesys Back-office Scheduling (EE26)

General Assumptions

Assumptions for PureConnect customers running Genesys Workforce Management

PureConnect Platform Assumptions:

The dependency use case covers the PureConnect Platform-specific assumptions.

Please be advised that Genesys Back office Scheduling (EE26) is currently not a dependency for this use case for PureConnect. The prerequisites for this use case on PureConnect are Genesys Workforce Management for Voice (EE01) and Genesys Omnichannel Workforce Scheduling (EE02)

- PureConnect GWFM Connector is required to utilize Genesys WFM on PureConnect

Other Assumptions

The customer has the requirement or desire to use this element of advanced WFM. The Inbound Voice use case is a pre-requisite of the base WFM package, including the definition of Queues, Stats, Agents & Skills. Because the WFM Web Supervisor uses Java, both JRE and Tomcat are requirements. See Supported Operating Environment Guide for specific versions.

- WFM Application settings enabled for Bidding: WFM Web > AgentBidding\AllowAccess=true.
- Supervisor builds profile schedules.
- Agents enter bids using Web Agent application.
Supervisor controls the bidding process using seniority, rank, or both.

Customer Responsibilities

Base WFM configuration completed for skills and profiles.

Document Version

- Version v 1.1.2 last updated July 12, 2021
Genesys Training and Activity Scheduling (EE12) for Genesys Engage on premises

Important
The benefits highlighted in this use case are typically tracked and measured by processes and systems outside of the Genesys solution. While our customers have realized benefits in these areas by using our solution, the measurements are not part of the standard offering of this use case.

Manage training, coaching and offline activities scheduling across the workforce

What's the challenge?
Scheduling agents for online versus offline tasks requires a delicate balance and coordination with back-end resources. While you want your agents to be servicing customers, you also want to provide them with appropriate training and coaching. When these processes are disparate, it makes scheduling challenging.

What's the solution?
Optimize and automate your scheduling process. Break away from manual spreadsheets and ease supervisor burdens by integrating offline tasks. Use operational insights on your agent competency to target effective training. Empower and trust agents to manage their individual schedules while reducing costs.

Other offerings:
Genesys Engage cloud

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
6.2 Document Version
Use Case Overview

Story and Business Context

Optimizing offline scheduling tasks allows a business to streamline operational processes between departments such as resource planning/forecasting, training, and contact center operations. Scheduling offline tasks is typically a very manual process occupying up to 30% of organizational Manpower planning and training resources.

Scheduling offline activities such as meetings, training, and coaching, can often be a time-consuming and disparate process. Consequently, scheduling teams have to juggle the optimum time for each session based on the business requirements and targets with room, manager and trainer availability. Due to the different business areas and systems involved, many in-house spreadsheets are developed to help record, track, and communicate the progress of the activities, all adding time and complexity to the process.

Training Manager helps remove these challenges, promoting a more collaborative working practice while managing the end-to-end process as a single entity. Managers and trainers can request and schedule their own ad-hoc meetings and training via the Training Manager Web Portal.

Through integrations with Workforce Management and Exchange, Training Manager can show:

- The best time to schedule an activity for business and agent availability.
- When managers and trainers are available
- When rooms are available

This integration allows for the creation of an optimized schedule for activities in minutes. Once finalized, the schedule can automatically be pushed to the following systems:

- WFM
  - Update agent, manager, and trainer schedules and work exceptions
- Exchange
  - Update room calendars
- Training Manager Portal
  - Update agent, manager, and trainer calendars
  - Create training attendance registers
- Email
  - Send participants and facilitators notification and calendar invites to their scheduled sessions

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:
<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Employee Satisfaction</td>
<td>Improve speed to competency through scheduled targeted training interventions set against Performance DNA results or by skill level; also limits training shrinkage. Improve visibility of training completion status through the Operational Dashboard to deliver improved training completion.</td>
</tr>
<tr>
<td>Reduced Administration Costs</td>
<td>Improve offline scheduling enables tasks between resource planning, training, and operations all to be done in minutes, not days or even hours. This in turn delivers operational efficiency with a reduction or reallocation of resources of approximately 30%. Improve management of room bookings through Outlook integration reduces scheduling and planning by optimizing the end-to-end training process. Improve scheduling of team meetings and one-on-one meetings between supervisors and employees. Empower managers to schedule their own meetings through the portal (within set parameters) means less workload for resource planners.</td>
</tr>
</tbody>
</table>

**Summary**

Deliver a set of capabilities to workforce planners that allow them to plan and execute offline scheduling of activities in the most efficient & effective manner.

**Use Case Definition**

**Business Flow**

(1) The following diagrams show the business flow of the use case.

The business flow described below requires the base configuration of Training Manager and WFM to be completed by Genesys Professional Services with future schedule and forecast data built and Training Manager configuration.
Business Flow Description  Ad-hoc meetings

1. Scheduler builds the Training Manager environment:
   - Defines Meeting Types.
   - Defines Locations and Rooms.
   - Optimizes Search parameters.
   - Maps Parameters to Meeting Types.
   - Enables auto-scheduling of requests.

2. Scheduler verifies that there is a current / future forecast and schedule.

3. Team Manager creates meeting request via the web portal:
   - Selects Meeting Type.
   - Specifies date range and times of day.
   - Selects the Manager to facilitate the meeting.
   - Selects the Location where the meeting should take place.
   - Selects the Attendees for the meeting based on the WFM hierarchy.

4. Submits the Meeting to the Automated queue.

The queued request is processed on a first-come-first-served basis and automatically triggers the search algorithm, which:

1. Collects staffing Requirements, Staffing Levels, Agent Availability, and Manager Availability from WFM.
   - Collects Room Availability from Exchange.
   - Schedules the meeting(s) at an optimized time to suit the business, Manager, and Attendees.
   - Adds failed requests to a work queue for a Scheduler to review manually.

2. Automated processes:
   - Write Work Exceptions to WFM.
   - Create room bookings in Exchange calendars.
   - Email the facilitating Manager and Attendees with the details of the meeting.
- Update product Manager and Agent calendars.
- Notify the person making the request of its progress.

Business Flow

(2) Recurring Meetings
Business Flow Description Recurring Meetings

1. Scheduler builds the Training Manager environment:
   - Defines Meeting Types.
   - Defines Locations and Rooms.
   - Optimizes Search parameters.
   - Maps Parameters to Meeting Types.
   - Enables auto-scheduling of requests.

2. Scheduler verifies that there is a current / future forecast and schedule.

3. Scheduler creates the Meeting Template:
   - Selects Meeting Type.
   - Specifies date range and times of day.
   - Selects the Manager to facilitate the meeting.
   - Selects the Location where the meeting should take place.
   - Configures recurrence rules.
     - Daily / Weekly / Monthly recurrence
     - Recurrence frequency, every X days, weeks, months
     - Minimum number of days between meetings, to prevent monthly one-to-one meetings happening in the same week, such as the 30th of one month and the 4th of the next.
   - Selects the Attendees for the meeting based on the WFM hierarchy.

4. Scheduler selects the meeting and runs an Optimized Search. The search algorithm:
   - Collects staffing requirements, staffing levels, agent availability and manager availability from WFM.
   - Collects room availability from Exchange.
   - Schedules the meetings at an optimized time to suit the business, manager, and attendees.
   - Adds failed requests to a work queue for a scheduler to review manually.

5. Automated processes:
Genesys Training and Activity Scheduling (EE12) for Genesys Engage on premises

- Write Work Exceptions to WFM.
- Create room bookings in Exchange calendars.
- Email the facilitating manager and attendees with the details of the meeting.

6. Updates appear in the manager and agent calendars.

Business Flow

(3) Training Requests

For each schedule run / creation, update the date range and run a new optimized search. The user is notified of any team changes that have taken place since the last meeting was scheduled.
Business Flow Description  Training Requests

1. Scheduler builds the Training Manager environment:
   - Defines Meeting Types.
   - Defines Locations and Rooms.
   - Optimizes Search parameters.
   - Maps Parameters to Meeting Types.
   - Enables auto-scheduling of requests.

2. Scheduler verifies that there is a current / future forecast and schedule.

3. Learning and Development creates a Training Template:
   - Selects a Training Type.
   - Specifies date range and times of day.
   - Selects the Trainer to facilitate the Training.
   - Selects the Location where the Training should take place.
   - Select the Attendees for the Training based on the WFM hierarchy.

4. Submit the training to the automated queue.

The queued request is processed on a first-come-first-served basis and automatically triggers the search algorithm, which:

1. Collects staffing requirements, staffing levels, agent availability and manager availability from WFM.
   - Collects room availability from Exchange.
   - Schedules the training at an optimized time to suit the business, manager, and attendees.
   - Adds failed requests to a work queue for a scheduler to review manually.

2. Automated processes:
   - Write Work Exceptions to WFM.
   - Create room bookings in Exchange calendars.
   - Email the facilitating Trainer and Attendees with the details of the Training.
• Update in product Trainer and Agent calendars.

• Notify the person making the request of its progress.

When used in conjunction with Performance DNA the Learning and Development team can target specific agent learning or levels of learning based on:

• Performance trends across the organization.

• Individual performance trends.

• Results from previous training / learning / coaching sessions.

• WFM skill.

• Correlation analysis: other agents that performed well in a specific training went on to improve in a skill. For example, agents that performed well in the "understanding customer needs" training went on to improve their NPS score.

**Business and Distribution Logic**

**Business Logic**

The business user needs to predefine, in the underlying workforce management system, the offline activities that are valid for scheduling.

**Distribution Logic**

N/A

**User Interface & Reporting?**

**Agent UI**

Agents access the Workforce Management Web Agent User Interface with a supported browser. There is no Java in this UI. See **Supported Operating Environment Guide** for specific browser support.
Genesys Training and Activity Scheduling (EE12) for Genesys Engage on premises

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Reporting

Real-time Reporting

Real-time Reporting: The following figure shows the reporting flow:
Employee Engagement - WFM - Reporting

Approved and Authorised Staff
- Agents
- Supervisors
- Forecasters
- Schedulers
  Can:
  Generate
  View
  Schedule
  Distribute
  Export

In these report categories
- Configuration
- Forecast
- Performance
- Schedule
- Adherence
- Audit
Approved, authorized staff have access to generate, schedule, and distribute out-of-the-box reports in the following categories:

- Configuration
- Forecast
- Performance
- Schedule
- Adherence
- Audit

The Genesys WFM product contains a number of out-of-the-box real-time reporting elements. Details can be found in the Workforce Management Administrator Guide.

Historical Reporting

The Genesys WFM product contains a number of out-of-the-box historical reporting elements. Details can be found in the Workforce Management Administrator Guide.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
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<tbody>
<tr>
<td>None</td>
<td>Workforce Engagement</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>Genesys Workforce Scheduling for Voice (EE01)</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>Genesys Omnichannel Workforce Scheduling (EE02)</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>Genesys Back-office Scheduling (EE26)</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>
General Assumptions

• API to GWFM is available.

Training Manager is available on an Azure Standalone cloud. Training Manager would be able to connect with Genesys Engage on-premises platform and GWFM from the standalone cloud.

• The offer will be available only as a Hybrid Offer for Genesys Engage on-premises Customers. The offer consists of the following
  • Training Manager Thick client can be installed by administrators on their systems
  • Training Manager Servers will reside in Azure Standalone Cloud
  • Training Manager Portal will be hosted from the Azure Standalone cloud

Customer Responsibilities

Up-to-date schedules are configured, and access to non-WFM users such as managers/trainers is input. This use can also support NICE IEX and Teleopti Workforce Management solutions where the customer has those products available.

Document Version

• Version v 1.0.2 last updated July 12, 2021
Genesys Skills Assessment (EE13) for Genesys Engage on premises

Automate employee skills and capability assessment

What's the challenge?
To match customers with the most appropriate agents, you need an accurate assessment of employee skills. This challenging-but-necessary task can be complicated by internal processes. As you align with HR and operations to reduce costs, your reduced visibility to organizational skill sets can impact customer experience.

What's the solution?
Automate employee skills and capability assessments to measure, manage and develop individual skills. By reducing knowledge gaps in your workforce with targeted, self-paced training and clear coaching insights, you can provide a more consistent customer experience across all channels.

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 and Distribution Logic
• 5 User Interface & Reporting?
  • 5.1 Agent UI
  • 5.2 Reporting
• 6 Customer-facing Considerations
• 6.1 Interdependencies
• 6.2 Document Version
Use Case Overview

Story and Business Context

As a base functionality, Performance DNA enables organizations to measure, manage, and develop employee skills and capability. Online knowledge assessments and feedback surveys are created within the system and are used to benchmark employee core knowledge. Learning items such as audio & video files, slide decks, documents, and webpages can be attached to Performance DNA assessments to address any knowledge gaps and ultimately improve employee capability.

Data is captured and maintained electronically while in-system reports provide real-time updates on activity completion and results. Learning items can then be delivered in a targeted manner, to address skills and capability gaps identified by Performance DNA, instead of using a generic “one-size-fits-all” approach.

Performance DNA provides:

- **Clearly defined and validated skills & capability blueprint** – Performance DNA blueprints align with HR, L&D, and Operations. Employee skills and capability data are captured electronically and retained in-system.
- **Increase speed to competency** – Self-paced learning and assessment programs can be deployed for new hires or existing employees to improve their speed to competency. Blueprints identify actual skills and capability levels among employees across the organization. Learning items can be targeted at addressing gaps quickly and effectively.
- **Enterprise employee optimization journeys** – Creation of individual employee development journeys provides clear visibility of the skill levels of all employees across the enterprise.
- **Reduced L&D cost** – Targeted development reduces costs associated with a "one size fits all" learning strategy. Online learning and assessments reduce over-reliance on classroom training and manual processing of attendance and results. Classroom training can be limited to employees who fail online learning and assessments. Digitalized assessments and reports cut back on trainers’ administrative workload, allowing them to focus on their core duties.
- **Standardized employee service to customers** – Similarly skilled and capable employees are more likely to provide consistent experience to customers, maintaining similar resolution rates and handle times.
- **Record management, governance and certification** – Training and coaching data such as completion, results, and analysis are stored in a single centralized source, reducing manual processing time, omissions, and errors. System-generated reports improve governance function and align with the requirements of ISO9001 and COPC CSP Standard.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Agent Competency</td>
<td>Comprehensive management of individual skills, capabilities and learning &amp; development plans dramatically improves agent competency.</td>
</tr>
<tr>
<td>Use Case Benefits</td>
<td>Explanation</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Improved Customer Experience</td>
<td>Individualized training focused on skills and capabilities needed to deliver high performance improves the customer experience.</td>
</tr>
<tr>
<td>Improved Employee Utilization</td>
<td>Individualized development plans reduce overall training &amp; development costs and time spent in training leading to improved employee utilization.</td>
</tr>
<tr>
<td>Reduced Administration Costs</td>
<td>Online administration and management of assessments and learning &amp; development including employee self-management reduces administrative overhead, effort and cost.</td>
</tr>
<tr>
<td>Reduced Employee Attrition</td>
<td>Employees who are provided with clearly defined, personalized training plans and career paths feel more valued and are less likely to leave.</td>
</tr>
</tbody>
</table>

**Summary**

Skills and capability can be assessed by importing historical data from previous activities conducted by the business, most notably by the learning and development team. Alternatively, or additionally, Performance DNA has a built-in assessment designer that can create multimedia-rich assessments. These include knowledge test, skills verification, scenario or situational assessments, aptitude tests and feedback surveys.

Once skills and capability data has been consolidated in Performance DNA, organizations can quickly and accurate identify highly skilled and capable employees across the enterprise for any given role. Their "blueprint" can be used as a benchmark for comparing skills and capability of other employees, teams, departments, outsources, or subsidiaries.

**Use Case Definition**

**Business Flow**

The following diagram shows the business flow of the use case:
1. **Business Flow Description**

1. Performance DNA has been provisioned and configuration has been completed in the cloud.

2. Locate Employee Data from HR file extract, and or WFM, including First Name, Last Name, Employee ID, and Team Information. Configure Org Data to import HR information daily. For configuration details see the Performance DNA Admin guide.

3. Create or modify a suite of baseline assessments.

4. Agents complete a suite of baseline assessments.

5. Collate Assessment results to provide holistic knowledge and capability measurement.

6. Assign Learning Items to support agent progression:
   - Based on Knowledge results, automatically suggest or assign relevant Learning Items.
   - Manually assign a personalized learning plan.

7. Agents to complete the Assessments and Knowledge Nudges assigned to them.
   - If successful, communicate improvement to Manager and continue through the process.
   - If unsuccessful, repeat part 4, for ongoing development and feeding results into the DNA blueprint.

8. Notify the manager on the completion of the Learning Item and arrange a performance review and create ongoing development plans for the agent.
Business and Distribution Logic

Business Logic

The business user needs to pre-define the assessments to be used for the baseline agent skill and capability benchmarking.

Business rules must be set up to auto-assign the designated assessments to the targeted focus groups.

Rules must be set up to provide remedial learning if the agent scores below a certain baseline assessment target score.

Distribution Logic

N/A

User Interface & Reporting?

Agent UI

Agents and supervisors access the Performance DNA UI with a supported browser. There is no Java in this UI. See Supported Operating Environment Guide for specific browser support.

Reporting

Real-time Reporting

N/A

Historical Reporting

The Genesys PDNA product contains a number of out-of-the-box reports. See the Skills Assessor (PDNA) Administration Guide for details.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
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<tbody>
<tr>
<td>None</td>
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<td>None</td>
</tr>
</tbody>
</table>
General Assumptions

• Performance DNA solution is offered to On-Premise customers from a Standalone Cloud in a Cloud-only supporting Hybrid Architecture.

• Performance DNA required a minimum of 200 agent seats are required to deploy a local standalone (independent) instance.

• KPI/Org data availability is mandatory for setting up the Performance DNA base configuration.

Customer Responsibilities

Customer to provide HR data on each employee. The following data is required as a minimum:

• Unique identifier (Employee ID or other)

• Personal Identifiers: First and Last Name, Job Role, Induction Start Date, On-the-Job Start Date, Email address

• Hierarchy Identifiers: Training Group, Team, Department / Business Unit, Site / Center, Company

• Reporting Identifiers: Reporting Manager unique identifier, Reporting Manager Name

• Optionally, customers can provide a historical skills and capability data, by employee and *activity. Skills and Capability data must include the following:
  • Unique identifier (Employee ID or other)
  • Activity identifier: Activity title, Activity type, Category, Date assigned, Date completed
  • Results identifier: Total Score, Achieved Score
  • Breakdown of score by question and answer (if necessary)

Document Version

• Version v 1.0.3 last updated July 12, 2021
Genesys Performance Management (EE14) for Genesys Engage on premises

Identify and compare employee performance

What's the challenge?

Identifying top performing employees and business units is a challenge when this data is spread across multiple back-end systems. Not having consolidated performance data makes it difficult to reward success and target individual training to fill knowledge gaps.

What's the solution?

Create a single source of truth for understanding employee performance. By consolidating data from disparate systems, you can more easily identify performance benchmarks. This centralized view across the enterprise helps identify top performers and highlights critical KPIs to target specific individual and group training.

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 and Distribution Logic
- 5 User Interface & Reporting?
  - 5.1 Agent UI
  - 5.2 Reporting
- 6 Customer-facing Considerations
• 6.1 Interdependencies
• 6.2 Document Version
Use Case Overview

Story and Business Context

As a base functionality, Performance DNA enables organizations to answer the following questions:

• Who are my top performing employees?
• What are my program-level and employee-level performance gaps?
• Where should I focus my time and resource investments to achieve performance improvements?

Organizations measure employee performance using a variety of key performance indicators. However, organizations may struggle, or fail, to consolidate performance data from different systems in a single place. This lack of consolidation impairs organizations from engaging and developing their employees in the most efficient and effective manner, thus increasing their operating cost, risk of non-compliance, and adverse impact on customer experience.

Performance DNA provides senior executives, managers and supervisors with a holistic view of performance, enabling them to direct their focus and efforts to areas that need it the most. Insights from Performance DNA will help coaches and trainers better engage employees to maximise their capability and provide better customer experience. The solution further supports data-driven decision making and improvements to Governance, Resource Planning, HR and Continuous Improvement functions. Performance DNA provides:

• Consolidated performance data – A centralized view of individual employee performance across the enterprise with the ability to roll data up to a department, business unit, or site view.

• Improvement management decision-making and governance – Consolidated performance data and analytics enables management and stakeholders to make educated decisions around employee engagement and development initiatives. It also improves governance functions by providing visibility on performance variations across outsourcers, departments, business units, teams, or individuals.

• Improved Performance Management – Create performance blueprints, or what we refer to as DNA mapping, based on multiple key performance indicators. Mapping enables businesses to identify performance issues at the program and agent levels. These insights improve management decision-making around employee engagement and development activities.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Agent Competency</td>
<td>Provides a holistic view of individual performance, skills and capabilities as a basis for improving performance.</td>
</tr>
<tr>
<td>Improved Customer Experience</td>
<td>Aligns individual performance development plans to overall organization goals based on high performers, improving customer experience.</td>
</tr>
</tbody>
</table>
Use Case Benefits

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reduced Administration Costs</td>
<td>Centralizes and automates elements of the performance management process, reducing administrative overhead, effort and costs.</td>
</tr>
</tbody>
</table>

Summary

Recommended for new and existing customers, Performance DNA is an enterprise-wide solution for use across contact centers, back office, HR, retail, BPO, and others.

Performance DNA imports and consolidates employee performance data from multiple sources and uses that data to build DNA Strands for each job role.

Performance data can be imported from Genesys Insights (Infomart), data warehouse, and data extracts from other third-party systems (such as Oracle, Salesforce, and Cisco). By setting import service to run as a scheduled task, performance data can be updated automatically.

DNA Strands are composed of any single performance data (Component) or any combination of performance data that are grouped together (Block). Components and Blocks can be weighted to reflect the relative importance of the performance measures to the business, then allowing DNA Strands to calculate and present a single overall measure of performance.

DNA Strands provide key insights into overall employee performance and the variance between Top, Mid, and Low performers. This information is presented from a high-level organizational view down to individual employees, enabling fast and accurate comparison against the equivalent high-performing benchmarks.

Use Case Definition

Business Flow

The following diagram shows the business flow of the use case:
Business Flow Description

1. Performance DNA has been provisioned and configuration has been completed in the cloud.

2. Complete the branding of application in line with the customer’s brand, including fonts, colors, and logos.

3. Locate Employee Data information from HR file extract and/or WFM (refer to HR data requirements listed under the Customer header in the Assumptions section).

4. Configure Org Data to import Employee Data automatically on a daily basis. For configuration details see the Performance DNA admin guide.

5. Collate KPI Data from Genesys solutions and/or third-party systems (refer to performance data requirements listed under the Customer header in the Assumptions section).

6. Build a high-performer DNA blueprint using KPI data, to identify the high and low performers:
   - Build DNA blueprint in line with business objectives.
   - Use high performers’ KPI and Knowledge results to set thresholds and targets.

7. Map employees to DNA blueprints based on job roles.
   - Compare other employees against top performers to the relevant blueprint for their role.

8. Measure Employee Performance
   - Identify gaps in individual performance.
   - Collate and review KPI data for ongoing development and improvement.
   - Optionally, send DNA blueprint/strand data for employees to Predictive Routing to aid in determining correlating factors/predictors of optimal outcomes.
Business and Distribution Logic

Business Logic

The business user decides on the Performance data that will be measured and used as the building block for the Agent DNA KPI Block.

Distribution Logic

N/A

User Interface & Reporting?

Agent UI

Agents and supervisors access the Performance DNA UI with a supported browser. There is no Java in this UI. See Supported Operating Environment Guide for specific browser support.

Reporting

Real-time Reporting

N/A

Historical Reporting

The Genesys PDNA product contains a number of out-of-the-box reports. Details can be found in the Skills Assessor (PDNA) Administration Guide.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
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<tbody>
<tr>
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<td>None</td>
</tr>
</tbody>
</table>
General Assumptions

• Performance DNA solution is offered to On-Premise customers from a Standalone cloud in a Cloud-only supporting Hybrid Architecture.
• Performance DNA requires a minimum of 200 agent seats to deploy a local standalone (independent) instance.
• KPI/Org data availability is mandatory for setting up the Performance DNA base configuration.
• Storage location for KPI data must be available to customer. Storage location for HR data must be available to customer.

Customer Responsibilities

• Customer to provide HR data on each employee. The following data is required as a minimum:
  • Unique identifier (Employee ID or other)
  • Personal Identifiers: First and Last Name, Job Role, Induction Start Date, On-the-Job Start Date, Email address
  • Hierarchy Identifiers: Training Group, Team, Department / Business Unit, Site / Center, Company
  • Reporting Identifiers: Reporting Manager unique identifier, Reporting Manager Name
• Customer to provide a minimum of three month’s historical performance data, by employee, and on either a daily or weekly basis. Performance data should include the following metrics:
  • Customer satisfaction metrics
    • For CSAT surveys – Total Surveys, Count Top Box, Count Middle Box, Count Bottom Box
    • For NPS Surveys – Total Surveys, Count Promoters, Count Passives, Count Detractors
  • Call handling metrics – Total Calls Answered, Total Handle Time, Total Talk Time, Total Hold Time, Total Wrap (After Call Work) Time
  • Call resolution metrics – Count Calls Eligible for Resolution, Count Calls Resolved (if multiple resolution metrics are used by the business, then repeat for each)
  • Call transfer or repeat metrics – Count Calls Transferred, Count Calls Repeated
  • Quality Assurance – Total Monitoring Sessions, Critical Score %, Non-Critical %
  • Sales data – Total Sales Unit, Total Sales Amount, Conversion Rates, Sales Target, Footfall (for retail)
  • Others

Note: KPI requirements vary depending on organization and type of operations and as such will be confirmed with the customer on a case-by-case basis.

Document Version

• Version v 1.0.3 last updated July 12, 2021
Genesys Proficiency Development (EE15) for Genesys Engage on premises

Automate personal development plan for employees

What's the challenge?

Companies spend a lot of time and money to attract top performing talent — only to realize this talent leaves after a short tenure. When motivating and retaining employees is a challenge, the organization can feel like a revolving door. This takes a toll on morale, resources and your customer experience.

What's the solution?

Give employees a clear view of their long-term journey within your organization. After initial onboarding, a clear personal development plan keeps employees motivated and engaged. Aligning organizational KPIs with individual objectives, gives your employees a way to track their progress against individual development plans.

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 and Distribution Logic
• 5 User Interface & Reporting?
  • 5.1 Agent UI
  • 5.2 Reporting
• 6 Customer-facing Considerations
6.1 Interdependencies
6.2 Document Version
Use Case Overview

Story and Business Context

Employees can build their own Personal Development Plans, aligning the plans to their own individual KPI measurements. Managers can review, update and approve the plans in line with company goals. The solution can be used across the enterprise. This use case leverages the benefits from Genesys Performance Management (EE14) for Genesys Engage on premises and Genesys Skills Management (EE16) for Genesys Engage on premises, and provides these added benefits:

- **Online employee development plans** – development plans can be created online, enabling the individual employee and manager to set objectives and development goals that are agreed on by both parties.

- **Continual development reviews** – continual reviews of individual development can be carried out between the individual and manager to measure performance improvements over time.

- **Alignment of objectives with KPI targets** – Key Performance Indicators can be used to set goals directly linked to individual performance.

- **Minimize employee attrition** – Providing each employee with a clear and defined personalized development plan and career progression.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Agent Competency</td>
<td>Individual development plans are aligned with overall organization goals and can be continually reviewed to align performance.</td>
</tr>
<tr>
<td>Reduced Administration Costs</td>
<td>Employees manage their development plans online, reducing administration overhead.</td>
</tr>
<tr>
<td>Reduced Employee Attrition</td>
<td>Employees with clear and defined personalized development plans feel valued and are less likely to leave.</td>
</tr>
</tbody>
</table>

Summary

Delivers the capability to the manager to build an employee journey with objectives and targets to be met and to track it across time.
Use Case Definition
Business Flow
**Business Flow Description**

1. **Base-level Configuration Completed.**
   - Employee creates Personal Development Plan with clear objectives and goals.

2. **Manager reviews Development Plan with individual and amends or adjusts as required.**
   - Measurements set against KPIs and individual goals set and agreed upon.

3. **Approval by Manager of finalized plan.**

4. **Periodic review carried out between manager and employee – comments added through the journey.**

5. **Manager completes the "recommend potential capability" of employee.**

6. **New goals and targets are set as employee progresses and improves.**
Business and Distribution Logic

Business Logic

Employees propose the objectives and how they are to be achieved, and must decide on the target types and targets associated to the objectives.

A review process meeting takes place between the Manager and employee to agree the final targets.

Business users create a Feedback Potential Capability Assessment.

Manager approve the proposed plan, review the results on a periodic basis, and complete a potential capability assessment of the employee.

Distribution Logic

N/A

User Interface & Reporting?

Agent UI

Agents access the Performance DNA Web UI with a supported browser. See Supported Operating Environment Guide for specific browser support.

Reporting

Real-time Reporting

N/A

Historical Reporting

The Genesys PDNA product contains a number of out-of-the-box reports. See the Skills Assessor (PDNA) Administration Guide for details.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.
### General Assumptions

- Performance DNA solution is offered to On-Premise customers from a Standalone Cloud in a Cloud-only supporting Hybrid Architecture.
- Performance DNA requires a minimum of 200 agent seats are required to deploy a local standalone (independent) instance.
- KPI/Org data availability is mandatory for setting up the Performance DNA base configuration.

### Document Version

- Version **v 1.0.4** last updated **July 12, 2021**
Genesys Skills Management (EE16) for Genesys Engage on premises

Align employee skills and capability with operational performance

What's the challenge?

Your frontline employees directly impact customers’ perception of your company. Yet it’s very difficult to know at any given point that your agent resources have the skills needed to drive business outcomes and are properly representing your brand.

What's the solution?

Identify skills that drive desired business results, then create models to distribute this knowledge in a consistent manner. Assess agent understanding of what you’ve provided, then target additional training if needed. Compare and track completion and effectiveness in driving your business performance metrics.

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 and Distribution Logic
• 5 User Interface & Reporting?
  • 5.1 Agent UI
  • 5.2 Reporting
• 6 Customer-facing Considerations
• 6.1 Interdependencies
• 6.2 Document Version
Use Case Overview

Story and Business Context

This extensional use case is built on foundational use cases Genesys Skills Assessment (EE13) for Genesys Engage on premises and Genesys Performance Management (EE14) for Genesys Engage on premises. It unlocks the key differentiating features of Performance DNA, enabling organizations to:

- identify skills & capabilities that drive high-performance,
- personalize employee engagement and development,
- increase coaching and training ROI, and
- help achieve better business outcomes.

This use case is applicable in the following scenarios:

- For existing customers who have deployed use case EE13 previously: Implementation of use case EE16 will be done in conjunction with use case EE14;
- For existing customers who have deployed use case EE14 previously: Implementation of use case EE16 will be done in conjunction with use case EE13.
- For new customers who are deploying use case EE13 and EE14 simultaneously: Implementation of use case EE16 will be done in conjunction with the above.

This use case addresses a number of pain points:

- **Performance management optimization** – Develop performance "blueprints" based on multiple key performance indicators and employee skills & knowledge used to improve key business metrics. Gain key insights on the skills and capability of high performers and use this as the basis for developing skills and capabilities of all other employees.

- **Targeted personal development based on KPIs** – Performance DNA blueprints help organizations identify specific skills and capability gaps of an employee when compared against a high performer in the same role. This enables targeted training and coaching based on each employee’s unique needs. Since development is based on high-performer skills and capabilities, the activities undertaken are aligned to overall business goals and targets.

- **Reduced Operating Costs** – By aligning employee skills and capabilities to actual business performance, organizations increase their returns on investment. Targeted coaching and training are more effective and reduce the overall number of sessions that need to be scheduled.

- **Consistent customer experience** - Gain actionable insights into the key skills drivers of company top performers and how these skill sets can be replicated to drive a consistent customer experience across all channels, enterprise-wide.

- **Conformance with ISO 9001 and COPC CSP Standards** – Consolidate record management across coaching, training, and operational performance functions. Reduce manual processing, omissions, and errors. Organizations pursuing or maintaining ISO9001 and/or COPC CSP certifications benefit from having high data quality (CUIKA) and system-generated reports that measure completion, results, effectiveness, trends, and sustained improvements as required by certification standards.
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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Agent Competency</td>
<td>Performance &quot;Blueprints&quot; provide insights on skills and capability of high performances as a basis for development of other employees. Individualisation of training and development needs to match high performance &quot;Blueprints&quot; aligns training with overall business goals and targets.</td>
</tr>
<tr>
<td>Improved Customer Experience</td>
<td>Developing and training to high performance &quot;Blueprints&quot; improves customer experience.</td>
</tr>
<tr>
<td>Reduced Administration Costs</td>
<td>Targeting of training and development based on individual gaps reduces overall training and administration costs. Consolidated record management reduces manual processing, errors and omissions, enabling organizations to demonstrate high quality data for certifications such as ISO 9001, COPC CSP and CUIKA.</td>
</tr>
</tbody>
</table>

Summary

Recommended for new and existing customers, Performance DNA is an enterprise-wide solution for use across contact centers, back office, HR, retail, BPO, and others.

Use case EE16 guides organizations to map employee skills and capability (from use case EE13) against employee performance (from use case EE14) in the Performance DNA solution.

The assessment framework in Performance DNA will be aligned with key performance indicators Configuration will allow specific assessments to be auto-assigned or recommended to employees when they fail to meet related KPI targets.

DNA Strands will be updated to include both skills and performance components with the actual design developed collaboratively.

Correlation analysis between skills and performance component to be enabled. Employee progress trend reports, meanwhile, will display learning outcomes and KPI results over time to help organizations measure process effectiveness.

Employees, and their managers, will be able to view skills and performance data in a single location, improving coaching flow and day-to-day conversations.
Use Case Definition

Business Flow

The following diagram shows the business flow of the use case:
Business Flow Description

1. Performance DNA has been provisioned and configuration has been completed in the cloud.

2. Complete the branding of application in line with the customer’s brand, including fonts, colors, and logos.

3. Complete use case.

4. Complete use case.

5. Correlate agent knowledge and KPI Data to identify top performers.

6. Build high-performer DNA ‘blueprint’
   - Build DNA blueprint in line with business objectives.
   - Use high performers’ KPI and Knowledge results to set thresholds and targets.

7. Compare other employees against the top performers to the relevant blueprint for their role.
   - Identify gaps in individual knowledge and performance.
   - Create personalized learning plans for each skill gap to support agent progression.

8. Assign Learning Items to support agent progression.
   - Based on Performance and Knowledge results, automatically suggest or assign relevant Learning Items.
   - Manually assign personalized learning plan.

9. Agents to complete the Assessments and Knowledge Nudges assigned to them.
   - If successful, communicate improvement to manager and continue through process.
   - If unsuccessful, repeat step 4, feeding results into performance blueprint.

10. Notify the manager on the completion of the Learning Item and arrange performance review and create ongoing development plans for the agent.

11. KPI and measurable targets are collated and reviewed, feeding back into the continuous improvement cycle.
Business and Distribution Logic

Business Logic

Business users must:

• build a consolidated Agent DNA framework using both KPI and Assessment metrics.
• set up business rules to automatically assign learning items to support identified performance or knowledge gaps.

Distribution Logic

N/A

User Interface & Reporting?

Agent UI

Agents access the Performance DNA Web UI with a supported browser. See Supported Operating Environment Guide for specific browser support.

Reporting

Real-time Reporting

N/A

Historical Reporting

The Genesys PDNA product contains a number of out-of-the-box reports. See the Skills Assessor (PDNA) Administration Guide for details.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

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<td>None</td>
</tr>
</tbody>
</table>
All of the following required: | At least one of the following required: | Optional | Exceptions
---|---|---|---
**Workforce Engagement**
- Genesys Skills Assessment (EE13)
- Genesys Performance Management (EE14)

**General Assumptions**
- Performance DNA solution is offered to On-Premise customers from a standalone cloud in a Cloud-only supporting Hybrid Architecture. A minimum of 200 agent seats is required to deploy a local standalone (independent) instance.
- KPI/Org data availability is mandatory for setting up the Performance DNA base configuration.

**Document Version**
- Version v 1.0.3 last updated **July 12, 2021**
Genesys Outsourcer Management (EE17) for Genesys Engage on premises

Manage skills and capabilities of outsourcer employees

What's the challenge?

It’s very difficult to know at any given point that your outsourced agent resources have the skills to drive business outcomes, and are properly representing your brand. Because the agents are outsourced, you have little to no visibility into what the agents know, and no control over coaching and development.

What's the solution?

Identify skills that drive desired business results, then create models to distribute this knowledge in a consistent manner. Assess outsourcer understanding of what you’ve provided, then target additional training if needed. Compare and track completion and outsourcer effectiveness in driving your business performance metrics.

Contents

• 1 What's the challenge?
• 2 What's the solution?
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  • 3.1 Story and Business Context
  • 3.2 Use Case Benefits*
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  • 5.2 Reporting
• 6 Customer-facing Considerations
6.1 Interdependencies
6.2 Document Version
Use Case Overview

Story and Business Context

This use case builds on top of use case Genesys Skills Management (EE16) for Genesys Engage on premises to enable your organization to manage outsourcer performance and commitment towards employee development and engagement. This provides a holistic view of each outsourcer's performance, skills, and capability, benchmarking them against internal performance or even other outsource centers.

This use case focuses on:

- **Real-time competency monitoring** – Introduces speed to competency certification to ensure that only employees with the required core skills are speaking to customers.
- **Visibility of partner performance** – Ability to compare the high-level capabilities of each partner, providing insights to drive strategic performance improvement strategies.
- **Individual employee capability monitoring** – Monitoring the skill levels of individual employees provides clarity around employee capability and allows for individual automated development journeys.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Agent Competency</td>
<td>Real-time competency monitoring ensures that only employees with the required skills and capability are engaging with customers. Monitoring of individual agent capabilities and skills provides a basis for automating development journeys.</td>
</tr>
<tr>
<td>Improved Customer Experience</td>
<td>Improved visibility of partner performance enables the organization to drive improvements in the experience provided to customers.</td>
</tr>
</tbody>
</table>

Summary

Delivers a set of capabilities that allow the organization to have visibility and manage the skills and capability across multiple outsourcers.
Use Case Definition

Business Flow

The following diagram shows the business flow of the use case:
Business Flow Description

1. Complete Performance DNA base configuration, including:
   - Complete use case EE16, Align Employee Skills and Capability with Operational Performance.
   - Complete branding of application in line with customer’s brand, including fonts, colors, and logos.

2. Compare current DNA performance between outsourcers and identify skill gaps.

3. Assign Assessments and remedial training to bridge knowledge gaps.

4. Employees complete the assessments and training:
   - Agent performance is tracked over time.
   - If an agent fails the assessment, additional learning can be scheduled.

5. Skills and capability data is viewed in Performance DNA, and comparison reporting is carried out between individuals, teams, centers, or outsource partners.

6. Performance of each outsourcer is measured providing a skills distribution matrix across the enterprise.
Business and Distribution Logic

Business Logic

The business user must identify the remedial training to be assigned when a specific knowledge or performance gap is identified.

Business rules must be set up to provide remedial training based on Agent DNA triggers below a certain score parameter.

Distribution Logic

N/A

User Interface & Reporting?

Agent UI

Agents access the Performance DNA Web UI with a supported browser. See Supported Operating Environment Guide for specific browser support.

Reporting

Real-time Reporting

N/A

Historical Reporting

The Genesys PDNA product contains a number of out-of-the-box reports. See the Skills Assessor (PDNA) Administration Guide for details.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
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<tbody>
<tr>
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<td>-------------------------------</td>
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<td>----------</td>
<td>------------</td>
</tr>
<tr>
<td>Workforce Engagement</td>
<td>• Genesys Skills Management (EE16)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### General Assumptions

- Performance DNA solution is offered to On-Premise customers from a standalone cloud in a Cloud-only supporting Hybrid Architecture. A minimum of 200 agent seats are required to deploy a local standalone (independent) instance.
- KPI/Org data availability is mandatory for setting up the Performance DNA base configuration.

### Document Version

- Version **v 1.2.4** last updated **July 12, 2021**
Genesys Compliance Certification (EE19) for Genesys Engage on premises

Deploy enterprise wide certification programs and fulfill regulatory compliance

What's the challenge?
Companies struggle to effectively certify employees and comply with regulatory requirements.

What's the solution?
Easily build, change, and manage employee certification, and report results across all your resources.

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 and Distribution Logic
• 5 User Interface & Reporting?
  • 5.1 Agent UI
  • 5.2 Reporting
• 6 Customer-facing Considerations
  • 6.1 Interdependencies
  • 6.2 Document Version
Use Case Overview

Story and Business Context

This use case builds on the Performance DNA base use case, Genesys Skills Assessment (EE13) for Genesys Engage on premises, to help organizations fulfill compliance regulatory requirements and build certification programs they can quickly deploy across the enterprise, including:

- **Ability to comply with regulatory requirements** – The ability to measure and report compliance to regulatory bodies with ease.
- **Building a comprehensive certification program** – The ability to easily build, change, and manage an employee certification program and track each employee’s progress.
- **Lowering operating cost for compliance** – A platform to quickly and cost-effectively deploy a compliance/certification program across the enterprise.
- **Real-time reporting** – The ability to report in real time across individuals, teams, or business units on compliance levels. Gap analysis reporting to pinpoint additional focus areas for training and coaching.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Agent Competency</td>
<td>Easily build, change, and manage a comprehensive employee certification program and track each employee’s progress</td>
</tr>
<tr>
<td>Reduced Administration Costs</td>
<td>Report on compliance to regulatory bodies easily and cost effectively.</td>
</tr>
<tr>
<td>Reduced Penalties and Fines</td>
<td>Report in real time on compliance levels to quickly identify and address gaps, reducing the risk of penalties and fines for non-compliance.</td>
</tr>
</tbody>
</table>

Summary

Provides the ability to design and implement a certification or compliance program across the enterprise, targeted at each individual employee. Real-time reporting provides detailed analysis on completion and identifies any gaps in capability.
Use Case Definition

Business Flow

The following diagram shows the business flow of the use case:
Business Flow Description

1. Complete Performance DNA base configuration, including:
   • Complete .
   • Complete branding of application in line with the customer’s brand, including fonts, colors, and logos.

2. Create or modify a suite of certification assessments, building certificates to be assigned to successful employees.

3. Agents complete a suite of certification assessments.

4. Collate Assessment results.
   • Unsuccessful attempts can be automatically reset.
   • Additional supporting learning items can be assigned.

5. Manager is notified on completion and can review results and arrange coaching or additional learning.

6. On completion, the certification report is updated with the names and dates of certified employees.
Business and Distribution Logic

Business Logic

The business user:

- Predefines the assessments to be used for the compliance or certification program.
- Sets up business rules to auto-assign the designated assessments to the agent target group.

Distribution Logic

N/A

User Interface & Reporting?

Agent UI

Agents access the Performance DNA Web UI with a supported browser. See Supported Operating Environment Guide for specific browser support.

Reporting

Real-time Reporting

N/A

Historical Reporting

The Genesys PDNA product contains a number of out-of-the-box reports. See the Skills Assessor (PDNA) Administration Guide for details.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
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<tr>
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<td>None</td>
</tr>
<tr>
<td>Workforce Engagement</td>
<td>At least one of the following required:</td>
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<tr>
<td>----------------------</td>
<td>----------------------------------------</td>
<td>----------</td>
<td>------------</td>
</tr>
<tr>
<td>Genesys Skills Assessment (EE13)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**General Assumptions**

- Performance DNA solution is offered to On-Premise customers from a standalone cloud in a Cloud-only supporting Hybrid Architecture. A minimum of 200 agent seats is required to deploy a local standalone (independent) instance.
- KPI/Org data availability is mandatory for setting up the Performance DNA base configuration.

**Document Version**

- Version v 1.0.4 last updated July 12, 2021
Genesys Employee Onboarding (EE20) for Genesys Engage on premises

Automate onboarding for improved speed to competency

What's the challenge?

Companies spend a lot of money to train new hires, only to have some leave immediately after onboarding training ends. This can result from the delay between learning a skill then putting it into practice, which can happen with longer duration onboarding.

What's the solution?

Use automation to identify ideal employees that fit your skill blueprint during the recruitment stage. Start onboarding by training on skills that can quickly be put into action, and reinforce any knowledge gaps with automated learning items.

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 and Distribution Logic
• 5 User Interface & Reporting?
  • 5.1 Agent UI
  • 5.2 Reporting
• 6 Customer-facing Considerations
• 6.1 Interdependencies
• 6.2 Document Version
Use Case Overview

Story and Business Context

This use case builds on the Performance DNA base use case, Genesys Skills Assessment (EE13) for Genesys Engage on premises, to build a Speed to Competency program to be used by new employees to:

- **Reduce employee attrition with new hires** – Provide a structured measurement of employee development at each stage of the onboarding journey. Ensure each employee is receiving the correct level of knowledge and address any knowledge gaps automatically.
- **Achieve speed to competency targets** – Building a linear measurement of individual skills and knowledge enables Learning and Development functions to address any employee skill gaps immediately, before any impact to the customer.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Agent Competency</td>
<td>Build a linear measurement of individual skills and knowledge so that Learning and Development functions can address any employee skill gaps immediately, before any impact to the customer.</td>
</tr>
<tr>
<td>Reduced Employee Attrition</td>
<td>Provide a structured measurement of employee development at each stage of the onboarding journey to ensure that each employee is receiving the correct level of knowledge and address any knowledge gaps automatically.</td>
</tr>
</tbody>
</table>

Summary

Delivers the capability to conduct onboarding programs efficiently and track their progress across time, as well ensuring that agents are competent in the most time-effective manner.

Use Case Definition

Business Flow

The following diagram shows the business flow of the use case:
Business Flow Description

1. Complete Performance DNA base configuration:
   - Completed use case.
   - Complete branding of application in line with the customer’s brand, including fonts, colors, and logos.

2. Create knowledge assessments specifically in line with onboarding program requirements, utilizing onboarding learning programs and subject matter experts to identify core learning content.

3. Employees are trained and relevant assessments are completed at the end of each training day. Organizations can configure a linear approach where assessments must be completed in order and in line with the learning delivered.

4. The trainer uses real-time reporting to identify any gaps and individual knowledge.

5. The trainer addresses learning gaps with each individual.

6. Employee completes end-of-learning assessments to ensure all core knowledge has been understood. Knowledge assessment questions from the mid-week knowledge assessments above can be reused, allowing for clear comparison of knowledge improvements.
   - Certificates can be provided to the employee upon completion of the knowledge assessment.
   - Employees failing end-of-block knowledge assessments can be retrained in the specific gaps identified. Employees may not be allowed to progress to the next stage until a minimum standard has been achieved.
Business and Distribution Logic

Business Logic

The business user:

• Predefines the assessments according to the Onboarding or Speed to Competency Program.
• Sets up business rules to auto-assign the onboarding assessments to all new employees.

Distribution Logic

N/A

User Interface & Reporting?

Agent UI

Agents access the Performance DNA Web UI with a supported browser. See Supported Operating Environment Guide for specific browser support.

Reporting

Real-time Reporting

N/A

Historical Reporting

The Genesys PDNA product contains a number of out-of-the-box reports. See the Skills Assessor (PDNA) Administration Guide for details.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
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<tbody>
<tr>
<td>None</td>
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<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>
### All of the following required:

<table>
<thead>
<tr>
<th>Workforce Engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Genesys Skills Assessment (EE13)</td>
</tr>
</tbody>
</table>

### At least one of the following required:

### Optional

### Exceptions

### General Assumptions

- Performance DNA solution is offered to On-Premise customers from a standalone cloud in a Cloud-only supporting Hybrid Architecture. A minimum of 200 agent seats is required to deploy a local standalone (independent) instance.
- KPI/Org data availability is mandatory for setting up the Performance DNA base configuration.

### Document Version

- Version v 1.0.4 last updated July 12, 2021
Genesys IVR Recording (EE21) for Genesys Engage on premises

Record the entire IVR interaction

What's the challenge?

Incomplete information makes it much harder to monitor and coach your teams. End-to-end recordings should include IVR and multiple handoffs across layers and locations to understand the whole interaction.

What's the solution?

Genesys IVR Recording provides end-to-end digital recordings stored either on-premise or in the cloud. Recordings are key records that can be used for monitoring and reports, or can be used to drive insights in other systems such as WFO or AI transcriptions.

Other offerings:
Genesys Engage cloud

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 and Distribution Logic
• 5 User Interface & Reporting?
  • 5.1 Agent UI
• 5.2 Reporting

• 6 Customer-facing Considerations
  • 6.1 Interdependencies
  • 6.2 Document Version
Use Case Overview

Story and Business Context

Genesys Interaction Recording is a compliance and control platform based on Genesys SIP, the T-Lib protocol, and the Genesys proprietary event model. Fully integrated to the CIM platform, Genesys Interaction Recording provides economies and powerful recording control via a host of integrations across the suite.

This solution enables the modern contact center to record the entire customer interaction, enabling the contact center to meet quality or regulatory compliance requirements.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Customer Experience</td>
<td>Recording IVR interactions provides a better understanding of how customers interact with it as a basis for improving customer experience.</td>
</tr>
<tr>
<td>Reduced Penalties and Fines</td>
<td>Ensure compliance with operational and legal requirements by recording 100% of IVR interactions.</td>
</tr>
</tbody>
</table>

Summary

Delivers 100% voice recording of customer interactions within the IVR for compliance and regulatory requirements.

Use Case Definition

Business Flow

The following diagram shows the business flow of the use case:
**Business Flow Description**

Customer makes a call to one of the service lines of the company.

1. The call is routed to the IVR.
2. An announcement is played to the customer that the call is going to be recorded.
3. Genesys Interaction Recording starts the recording.
4. If needed, the customer or the system transfers the call to an agent.
5. Customer or IVR disconnects the call.
6. Genesys Interaction Recording stops and stores the recording.
7. Supervisor searches for, retrieves, and listens to a recording made by one of their agents.
8. Legal and Compliance officer checks the system for compliance and retrieves recordings for legal purposes.
9. Genesys Interaction Recording archives and purges recordings according to the rules defined in the system.
Business and Distribution Logic

Business Logic

Details of the business flow described in the previous section depend on how the system is set up for your environment. This section describes the available options and how Genesys Professional Services does the initial setup for your environment.

Metadata

Metadata are tags that are added to the recording and allow precisely targeted interaction search and selection for evaluation and analysis. What data is available depends on the distribution logic implemented in your environment.

Archiving and Purging Criteria

Recordings can be archived and/or purged from the system after a specified time. After recordings have been purged, they are no longer available for supervisors or compliance officers from the Genesys user interface. The corresponding policies are configured during setup. This use case provides one set of rules that are valid for all recorded calls. GIR does not manage archived files. It is the customer’s responsibility to set up the lifecycle policy of these archives and purge them after the lifecycle period.

Access Control

Access control to recordings is managed by user roles and associated permissions as well as by the organizational hierarchy defined for the individual agents. This use case includes a default set of roles that can be provided upon request.

Pause / Resume recording

The ability for the system to pause and resume a recording is configured as part of the VXML scripts within the IVR, based on your requirements.

Distribution Logic

N/A

User Interface & Reporting?

Agent UI

N/A
Reporting

Real-time Reporting

N/A

Historical Reporting

Historical reporting is provided by templates in the SpeechMiner UI (business interface), which is part of Genesys Interaction Recording. As this is a compliance use case, the number of calls recorded per service/business line/customer segment is not relevant. The assumption is that 100% of calls are recorded.

In addition to the historical reporting, Genesys Interaction Recording provides audit logs for recording access. These audit logs contain the following information:

- Who accessed a recording
- Which recording
- When accessed
- Deletions
- Playback requests
- Exports
- Report exports
- Customer ID
- Interaction Type
- Reason Code
- All attached metadata
- Archive and Purging logs

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
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</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>Workforce Engagement</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>
### All of the following required:

- Genesys Voice Recording (EE07)
- Genesys Voice and Screen Recording (EE08)

### At least one of the following required:

### Optional

### Exceptions

## General Assumptions

- The Record IVR Interactions – Base package supports 100% of voice recording at the IVR Extension level only (no other recording methods)
- This use case supports Genesys GVP only–no 3rd-party IVRs
- Apache is the only load balancer currently supported for GIR
- GIR MCPs are not shared with GVP

## Customer Responsibilities

- If IVR is used to collect payment information or other customer-sensitive data, then use case Genesys Selective Recording (EE30) or Genesys Compliance Recording (EE29) needs to be used as well.
- The following activities are out of scope:
  - Configuration of network at its final state: SBC, Media Gateways, VLANs, Firewalls, NAT, Trunking Services, etc.
  - Configuration or setup of additional Load Balancer software/hardware (DNS method or other)
  - Load balancing or cluster for API Servers
  - Configuration of external storage system (such as SAN / NAS)
  - Setup of lifecycle policy for archived files
  - Installation of the standard out-of-the-box Workforce Desktop Edition
  - Customization of other desktop applications to enable Dynamic Recording
  - High Availability for the Apache Load Balancer
  - Provisioning of recordings from other vendors

## Document Version

- Version v 1.0.2 last updated July 12, 2021
Genesys Speech Analytics (EE22) for Genesys Engage on premises

Important
This use case supports Genesys Engage and PureConnect as the Speech Analytics product is supported to run on both platforms.

Gain basic insight into voice interactions using speech analytics

What's the challenge?
Organizations that record all or a portion of their calls amass a significant amount of data in those recordings. The difficulty lies in sifting through thousands of hours of dialog to find what's most important - a task that's impossible without automation.

What's the solution?
It starts by automating the transcription of your calls. From there, you can discover trends such as frequency and changes in frequency of words and phrases. Use the search function if you’re looking for something specific.

Other offerings:
Genesys Engage cloud PureConnect

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 and Distribution Logic

• 5 User Interface & Reporting?
  • 5.1 Agent UI
  • 5.2 Reporting

• 6 Customer-facing Considerations
  • 6.1 Interdependencies
  • 6.2 Document Version
Use Case Overview

Story and Business Context

Organizations want to improve business performance, using the valuable information that is contained in recordings of interactions between customers and agents. It is impossible to mine even a small amount of the information contained in these recordings through manual sampling or listening.

Interaction Analytics provides organizations with the ability to mine the content of recordings for specific phrases that indicate the occurrence of key events relating to customer experience, agent performance, sales, and compliance.

This base use case introduces the Interaction Analytics technology and use of the speech-to-text engine to transcribe the content of voice interactions, search for key words and phrases, and automatically detect changes in the frequency of the occurrence of words and phrases over time and across interactions.

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:

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Improved Conversion Rates</td>
<td>Conversion rates, close rates, cross-sells and up-sell rates will improve through the ability to automatically generate outbound calls and empowering agents with single searchable desktop application that shows customer context.</td>
</tr>
<tr>
<td>Improved Customer Experience</td>
<td>Monitor conversations for changes in the use of words and phrases to identify changes in behaviour or emerging trends as an input to improving customer experience.</td>
</tr>
<tr>
<td>Improved First Contact Resolution</td>
<td>Ensures that all employees have the core skills to identify trends in calls that lead to positive sales outcomes and deal with each customer interaction.</td>
</tr>
<tr>
<td>Reduced Handle Time</td>
<td>Reveals the frequency of specific words and phrases, and the context in which they are used, reducing handle time.</td>
</tr>
<tr>
<td>Reduced Volume of Interactions</td>
<td>Optimize self-service, predict when to engage with a customer or visitor to offer the right content or options, or offer a callback or proactively communicate with a customer aids in reduced volume of interactions.</td>
</tr>
</tbody>
</table>

Summary

Enables the organization and its analytics teams to mine the content of voice recordings for specific phrases that indicate the occurrence of key events relating to customer experience, agent performance, sales, and compliance.
Use Case Definition
Genesys Speech Analytics (EE22) for Genesys Engage on premises

Business Flow
Business Flow Description

1. Interaction is recorded.
2. Audio is transcribed to text.
3. Words and phrases in transcribed texts are automatically clustered in terms of frequency and changes in frequency.
4. Users can access search functionality to search for content in interactions.
5. Users can access discovery functionality to identify emerging trends and word clusters.
6. Users can play back interactions and read contents of transcription.

Note that in GIR, recordings are automatically fed to Interaction Analytics, while 3rd-party recording solutions require call recordings to be fed using batch processes.
**Business and Distribution Logic**

**Business Logic**

See the user guide for search and discovery functionality.

**User Interface & Reporting?**

**Agent UI**

Genesys Interaction Analytics is a browser-based user interface. Access control for specific employee roles can be configured and is handled via the User Security configuration.

More information can be found within the product administration guide.

**Reporting**

**Real-time Reporting**

N/A

**Historical Reporting**

Historical reporting is provided by templates in the SpeechMiner UI (business interface), which is part of the Genesys Interaction Analytics platform. A full copy of the reports available is documented in the User Manual.

**Customer-facing Considerations**

**Interdependencies**

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Genesys Voice Recording (EE07)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
All of the following required: | At least one of the following required: | Optional | Exceptions
--- | --- | --- | ---
• Genesys Voice and Screen Recording (EE08)

General Assumptions

Assumptions for PureConnect customers running Genesys Speech Analytics

PureConnect Platform Assumptions:

Minor additional work is required to integrate 3rd-party recording and this is catered for in the use case. This has no practical impact on the performance of the system or the user experience.

Interactions must be unencrypted or, if encrypted, then provided in a form and with appropriate keys to enable decryption by Genesys.

The preferred format for recordings is WAV PCM (uncompressed). Preferred format for metadata associated with recordings is XML files with one XML file per recording.

When deployed with PureConnect, recordings are fed to Interaction Analytics via the "UConnector for PureConnect" which is a custom Professional Services asset.

The prerequisites for this use case on PureConnect are Genesys Voice Recording (EE07) and Genesys Voice and Screen Recording (EE08)

UConnector for PureConnect is required to utilize Genesys Intelligence Analytics on PureConnect

Languages

Languages currently available on Premise include: English, Spanish, German, French, Brazilian Portuguese, Italian, Korean, Japanese, Mandarin, Arabic, Turkish, Cantonese, Dutch, Canadian French, Russian.

Check with product team for specific dialects and planned dates for new languages.

Document Version

• Version v 1.2.4 last updated July 12, 2021
Genesys Advanced Text and Speech Analytics (EE23) for Genesys Engage on premises

Important
This use case supports Genesys Engage and PureConnect as the Speech and Text Analytics product is supported to run on both platforms.

Achieve deeper operational insights with speech and text Analytics

What's the challenge?
There's a lot of dialog that resides in your recorded voice calls and digital interactions. How do you make that data actionable and help improve your operational and strategic goals?

What's the solution?
Automate the transcription of your voice and digital interactions, including tools for deeper analysis and trending.

Other offerings:
Genesys Engage cloud PureConnect

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
Genesys Advanced Text and Speech Analytics (EE23) for Genesys Engage on premises

- 4.1 Business Flow
- 4.2 Business and Distribution Logic
- 5 User Interface & Reporting?
  - 5.1 Agent UI
  - 5.2 Reporting
- 6 Customer-facing Considerations
  - 6.1 Interdependencies
  - 6.2 Document Version
Use Case Overview

Story and Business Context

Contact Center managers and supervisors typically listen to 1-2% of agent calls as the basis for coaching and training. This means they have to rely on other metrics such as average handle time, call volumes, resolutions, or surveys as a basis for assessing agent performance.

Interaction Analytics enables the content of 100% of agent calls to be incorporated into assessments, training, and coaching. Managers and supervisors can search within the interactions for specific words and phrases, accurately classify call types, sentiment, agent behavior, and customer reactions, understanding contact center performance at both an aggregate and individual level across teams and regions, including both in-house and outsourced resources.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Customer Experience</td>
<td>Measure customer sentiment at both the start and end of calls to understand how factors outside the contact center affect customer experience. Increase the speed at which the need for improvements can be identified and acted upon.</td>
</tr>
<tr>
<td>Improved Employee Utilization</td>
<td>Enables efficient and comprehensive analysis of all calls of a particular type without having to listen to hours of audio.</td>
</tr>
<tr>
<td>Improved Insights and Visibility</td>
<td>Objectively correlate what happens on calls with measures of outcomes - first call resolution, call volume, handle time, customer satisfaction or Net Promoter Score.</td>
</tr>
<tr>
<td>Increased Revenue</td>
<td>Accurately assign outcomes to interactions rather than relying on manual input.</td>
</tr>
<tr>
<td>Reduced Administration Costs</td>
<td>Conduct efficient and comprehensive analysis of calls without having to listen to hours of audio.</td>
</tr>
</tbody>
</table>

Summary

Identify the differentiating behaviors that both drive and increase the speed of operational improvement in areas such as first contact resolution, call volume, repeat calls or handle time reduction, and customer satisfaction of Net Promoter Score through a thorough and comprehensive analysis of call content.
Use Case Definition
Business Flow
Business Flow Description

1. The voice interaction is recorded (GIR or 3rd-party recorder) or the digital (text) interaction is completed (Genesys eServices or 3rd-party data source).

2. During a KPI workshop, identify the business opportunity to be addressed:
   - Reduce call volume
   - Improve FCR
   - Reduce AHT
   - Improve CSAT/NPS
   - Improve agent performance

3. Identify the specific areas of measurement to support the improvement of the business opportunity.

4. During a PS discovery workshop, identify the required measurement elements (topics) to address the KPIs. A typical engagement for one business unit deploying use cases and Genesys Advanced Text and Speech Analytics (EE23) for Genesys Engage on premises is 12 weeks of PS effort, covering 30 topics.

5. Build the required measurement elements inside GIA with associated reports.

6. PS conducts user training using customer’s system and data.

7. Customer conducts analysis with GIA to determine how to improve performance.

8. Customer implements solutions within the business operation.

9. Customer tracks the resulting performance improvement.

10. Genesys Business Consulting provides business consulting through the first few projects.
Business and Distribution Logic

Business Logic

• Objectively identify and quantify the multiple reasons for the customer interaction and efficiently transcribe the contents of the interaction for analysis.

• Enable quality assurance process improvement through setting the foundation to enable organizational specific interests and needs.

• Focus analysis on calls of a particular type or having specific outcomes, for example payment calls, complaints, calls exhibiting customer satisfaction or dissatisfaction.

• Improve First Contact Resolution, Customer Satisfaction, and Net Promoter Score.

• Provide tending and analysis of interaction content along with other key metadata to understand the key drivers of performance.

• Reduce Average Handle Time by understanding the triggers across resources and topics for extended interaction times.

• Improve Employee Performance through understanding the employee performance linked to the underlying topic and categories of the interaction and implementing coaching and training plans.

• Interaction Trending and Discovery through visibility into emerging and unknown interactions across topic, category and customer intention.

Distribution Logic

N/A

User Interface & Reporting?

Agent UI

Genesys Interaction Analytics is a browser-based user interface. Access control for specific employee roles can be configured and is handled via the User Security configuration.

More information can be found within the product administration guide.

Reporting

Real-time Reporting

N/A

Historical Reporting

Historical reporting is provided by templates in the SpeechMiner UI (business interface), which is part of Genesys Interaction Analytics platform. A full copy of the reports available is documented in the User Manual.
Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workforce Engagement</td>
<td>Genesys Speech Analytics (EE22)</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td></td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td></td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>

General Assumptions

Assumptions for PureConnect customers running Genesys Speech and Text Analytics

PureConnect Platform Assumptions:

When implemented in conjunction with Genesys Interaction Recording, caller ANI and agent hierarchy data is generally available without requiring additional professional services.

Where the use case is implemented in conjunction with a 3rd-party recording solution, additional professional services effort may be required to import ANI and agent hierarchy information.

Appending NPS or CSAT data to recordings may require additional professional services effort.

The prerequisite for this use case on PureConnect is Genesys Speech Analytics (EE22)

UConnector for PureConnect is required to utilize Genesys Intelligence Analytics on PureConnect

Document Version

Version v 1.2.3 last updated July 12, 2021
Genesys Text and Speech Analytics for Customer Service (EE24) for Genesys Engage on premises

Important

This use case supports Genesys Engage and PureConnect as the Speech and Text Analytics product is supported to run on both platforms.

Mine call recordings for insights to improve agent and customer experiences

What's the challenge?

Most customer requests and issues follow consistent patterns, but you still need people to make sense of their language to respond. Teams can still miss emerging changes in customer requests until they become bigger issues. Finally, how can you identify better issue handling to adopt for training?

What's the solution?

AI transcription of voice, combined with text interactions in all channels, identifies keywords and phrases along with customer context to improve responses. Detect changes in the occurrence of words and phrases over time and across interactions to unlock valuable insights into call outcomes.

Other offerings:

Genesys Engage cloud PureConnect

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 and Distribution Logic

• 5 User Interface & Reporting?
  • 5.1 Agent UI
  • 5.2 Reporting

• 6 Customer-facing Considerations
  • 6.1 Interdependencies
  • 6.2 Document Version
Use Case Overview

Story and Business Context

Organizations invest huge amounts of time and effort in developing and testing sales campaigns, agent sales scripts to support them, and training of agents to be effective. When it comes to understanding what makes campaigns or agents effective in sales, however, they have very limited information available.

Using Interaction Analytics enables deep insight into what does and does not work across all aspects of the campaign, including which messages are effective, which features or benefits customers best respond to, and the skills and behavior that agents need to be effective.

Rather than relying on limited sampling, anecdote, or hearsay from agents or customers, Interaction Analytics provides objective, quantifiable feedback and points directly to what is needed to drive more successful sales outcomes. It works with inbound and outbound campaigns across new sales, cross-sell/up-sell and retention scenarios, and enables the benefits of the approach to be accurately and objectively proven.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased Response Rates</td>
<td>Conduct effective and measurable A/B testing of campaigns, providing confidence to iterate more quickly and improve response rates and Objectively correlate campaign or script content with sales outcomes and use to improve response rates.</td>
</tr>
<tr>
<td>Increased Revenue</td>
<td>Differentiate between campaign or sales script resonance and agent performance as a basis for improved revenue.</td>
</tr>
</tbody>
</table>

Summary

Recordings of campaign calls are analyzed to identify effective messages, techniques, and language used by agents, correlating these to sales outcomes and using the results to improve both campaign and agent performance.
Use Case Definition
Business Flow
Business Flow Description

1. Identify sales area and campaigns on which to focus--new sales conversion, up-sell/cross-sell, retention.

2. Identify "topics" included in sales calls based on sales methodology or script steps, such as features, benefits, objection handling, asking for the sale, campaign messages, and qualifying questions.

3. Create lists of phrases or words associated with topics.

4. Classify calls based on sales outcomes (using content from within the calls, such as taking payment and confirming the order).

5. Optional: Append metadata (such as sales value, new/existing customer information, segmentation) to calls from other systems.

6. Classify agent performance as "high" or "low" based on conversion rates.

7. Compare topics included in calls by high- and low-performing sales agents.

8. Identify topics that differentiate between high and low performing agents.

9. Focus training for agents on differentiating topics using high-performing agents as a model, and reduce call duration by reducing or eliminating time spent on non-differentiating topics.

10. Compare topics included in calls with successful vs unsuccessful outcomes.

11. Identify topics that differentiate between successful and unsuccessful outcomes.

12. Refine campaign messages and scripts to focus on topics that differentiate in favor of successful outcomes, reduce emphasis, or eliminate topics that are non-differentiating.

13. Monitor effectiveness of refined campaigns and newly trained agents to quantify improvement in sales outcomes.
Business and Distribution Logic

Business Logic

See the User Manual for search and discovery functionality.

Distribution Logic

N/A

User Interface & Reporting?

Agent UI

Genesys Interaction Analytics is a browser-based user interface. Access control for specific employee roles can be configured and is handled via the User Security configuration.

More information can be found within the product administration guide.

Reporting

Real-time Reporting

N/A

Historical Reporting

Historical reporting is provided by templates in the SpeechMiner UI (business interface), which is part of the Genesys Interaction Analytics platform. A full copy of the reports available is documented in the User Manual.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

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<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>
All of the following required: | At least one of the following required: | Optional | Exceptions
---|---|---|---
• Genesys Speech Analytics (EE22)

General Assumptions

Available for Genesys Engage on-premises customers for use with Genesys Interaction Recording and 3rd-party recording solutions. Available for PureConnect Premise customers, via the "UConnector for PureConnect" which is a custom Professional Services asset.

Assumptions for PureConnect customers running Genesys Speech and Text Analytics

PureConnect Platform Assumptions:

Minor additional work is required to integrate 3rd-party recording and this is catered for in the use case. This has no practical impact on the performance of the system or the user experience.

Interactions must be unencrypted or, if encrypted, then provided in a form and with appropriate keys to enable decryption by Genesys.

The preferred format for recordings is WAV PCM (uncompressed). Preferred format for metadata associated with recordings is XML files with one XML file per recording.

When deployed with PureConnect, recordings are fed to Interaction Analytics via the "UConnector for PureConnect" which is a custom Professional Services asset.

The prerequisite for this use case on PureConnect is Genesys Speech Analytics (EE22)

UConnector for PureConnect is required to utilize Genesys Intelligence Analytics on PureConnect

Languages

Languages currently available include: English, Spanish, German, French, Brazilian Portuguese, Italian, Korean, Japanese, Mandarin, Arabic, Turkish.

Languages in development or on the roadmap include: Cantonese, Dutch, Canadian French.

Check with product team for specific dialects and planned dates for new languages.
Document Version

- Version v 1.2.3 last updated July 12, 2021
Enforce compliance and legal responsibilities with speech and text analytics

What's the challenge?

Many organizations work under strict regulatory requirements for use of data and communications. Monitoring for compliance adherence is a never-ending and stressful job. There isn’t time to check every interaction so you use sampling, but what if you miss a critical problem?

What's the solution?

Automated speech and text monitoring for comprehensive monitoring. Genesys systems check agent and organization compliance with legal, regulatory and organization obligations. Monitor 100 percent of interactions to reduce risk of compliance failures, litigation, financial impact and damage to reputation.

Other offerings:
Genesys Engage cloud PureConnect

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 and Distribution Logic

5 User Interface & Reporting?

5.1 Agent UI

5.2 Reporting

6 Customer-facing Considerations

6.1 Interdependencies

6.2 Document Version
Use Case Overview

Story and Business Context

Organizations have to comply with a wide range of legal and regulatory requirements that vary depending on the industry they operate in, the types of the interactions they are handling, the types of customers they are serving, and even the content of the interaction itself. The impact of non-compliance, even in isolated instances, can be devastating legally, financially, and to the organization’s reputation. It is therefore critical to ensure, as far as possible, complete compliance on every single interaction.

Using Interaction Analytics provides the ability to monitor 100% of interactions, check for the occurrence or non-occurrence of specific words and phrases related to a range of legal and regulatory compliance obligations, and prove the level of compliance with these obligations. This is impossible to do with sampling of recordings.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reduced Penalties and Fines</td>
<td>Measuring agent-level compliance with company and legal requirements reduces systematic risk of compliance failures and associated costs.</td>
</tr>
</tbody>
</table>

Summary

Provide comprehensive monitoring and validation of compliance with legal, regulatory and organization obligations and both individual agent and overall organizational levels to reduce risk of compliance failures, litigation, financial impacts, and damage to organization reputation or brand.
Use Case Definition
Business Flow
1. The voice interaction is recorded (GIR or 3rd-party recorder) or the digital (text) interaction is completed (Genesys eServices or 3rd-party data source).

2. Customer provides a list of compliance requirements.

3. Identify the required compliance events (topics) and the events that trigger a compliance requirement (topics and/or metadata). A typical engagement for one business unit deploying use cases and Genesys Text and Speech Analytics for Compliance (EE25) for Genesys Engage on premises is 12 weeks of PS effort, covering 20 topics.

4. Build the required measurement elements inside GIA with associated reports. (Genesys PS)

5. Conduct user training using customer’s system and data. (Genesys PS)

6. Conduct analysis with GIA to determine which compliance areas need improvement. (Customer)

7. Implement training programs within the business operation to improve agent compliance performance. (Customer)

8. Track the resulting performance improvement. (Customer)

Business consulting is provided through the first few projects.
Business and Distribution Logic

Business Logic

Business issues that an implementation might need to deal with include:

- Financial regulation, medical, payments, credit cards
- Compliance with company regulation and standards
- Differences across regions, different states or countries
- Data regulation
- Union / employment
- Discrimination
- Things agents must say
- Things agents must not say
- Things agents omit
- Points in a call at which things need to be said
- Confirmation of consent
- Triggering of what is required based on the content of the call
- Confirmation from customers

Distribution Logic

N/A

User Interface & Reporting?

Agent UI

Genesys Interaction Analytics is a browser-based user interface. Access control for specific employee roles can be configured and is handled via the User Security configuration.

More information can be found within the product administration guide.

Reporting

Real-time Reporting

N/A
Historical Reporting

Historical reporting is provided by templates in the SpeechMiner UI (business interface), which is part of the Genesys Interaction Analytics platform. A full copy of the reports available is documented in the User Manual.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

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<td>None</td>
</tr>
<tr>
<td>• Genesys Speech Analytics (EE22)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

General Assumptions

**Assumptions for PureConnect customers running Genesys Speech and Text Analytics**

PureConnect Platform Assumptions:

When implemented in conjunction with Genesys Interaction Recording, caller ANI and agent hierarchy data is generally available without requiring additional professional services.

Where the use case is implemented in conjunction with a 3rd-party recording solution, additional professional services effort may be required to import ANI and agent hierarchy information.

Appending NPS or CSAT data to recordings may require additional professional services effort.

The prerequisite for this use case on PureConnect is Genesys Speech Analytics (EE22)

UCconnector for PureConnect is required to utilize Genesys Intelligence Analytics on PureConnect
Genesys Text and Speech Analytics for Compliance (EE25) for Genesys Engage on premises

Document Version

- Version v 1.1.3 last updated July 12, 2021
Genesys Back-office Scheduling (EE26) for Genesys Engage on premises

Optimize utilization for back-office and task-based workers

What's the challenge?

Even the most consistent business has peak periods and needs that change over time. Staffing for peaks leaves some people sitting and waiting for work, but staffing for the average load means unhappy customers or incomplete work during peaks. What if you could better predict and respond to changes?

What's the solution?

Back-office scheduling tools to effectively and accurately forecast work loads, with schedule automation and manual management processes. These systems are widely used by a range of support organizations for dependable efficiencies by aligning work priorities while decreasing management overhead.

Other offerings:
Genesys Engage cloud

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
  • 6.2 Document Version
Use Case Overview

Story and Business Context

Traditionally, back-office environments have not enjoyed the advanced contact center benefits that workforce management solutions have provided due to the non-integrated nature of such environments. Using Genesys Workforce Management coexisting with a Genesys Enterprise Workload Management solution, businesses can effectively and accurately forecast and schedule back-office work items.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Employee Utilization</td>
<td>Scheduling the most skilled individuals to handle each type of work improves employee utilization. Accurate forecasting, scheduling and performance monitoring for back office staff also improves employee utilization.</td>
</tr>
<tr>
<td>Reduced Administration Costs</td>
<td>Automated scheduling for back office employees reduces administration effort and cost.</td>
</tr>
<tr>
<td>Reduced Overtime Costs</td>
<td>Improving strategic and long-term planning for back office staffing reduces overtime costs.</td>
</tr>
</tbody>
</table>

Summary

Genesys WFM, when integrated with a Genesys EWM solution, allows users to forecast and schedule for back-office work items.
Use Case Definition
Business Flow
Business Flow Description

Forecasting Flow Description

- Step 1: Validate that the historical data has been collected and stored accurately.
- Step 2: Workforce Planner or Supervisor creates or edits a forecast scenario.
  - Workforce Planner or Supervisor uses the Forecasting Build Wizard to build a volume forecast.
  - Workforce Planner or Supervisor uses the Staffing Build Wizard to determine the requirements.
- Authorized user can modify the forecast.
- Step 3: The Forecast Scenario is then published to the Master Forecast.
- Step 4: Forecaster notifies the scheduler that the Master forecast is published.

Scheduling Flow Description

- Step 5: Scheduler creates the Schedule Scenario.
- Step 6: Scheduler builds the schedule.
- Step 7: Scheduler publishes the schedule scenario to the Master Schedule.

Intraday Flow Description

- Step 8: The forecasters, schedulers, planners, or supervisors manage adds, moves, and changes to existing schedules based on their individual access rights.
- Step 9: Agents are notified of changes via email.
- Step 10: Scheduler and Forecaster evaluate accuracy of forecast to actual and adjust accordingly.
- Step 11: Supervisors can monitor the adherence of the agents in their team to the published schedule.
Business Flow

Digital and back office flow
Business Flow Description
Business and Distribution Logic

Business Logic

A prerequisite to any basic WFM deployment is a formal discovery process with resulting commensurate documentation.

Distribution Logic

N/A

User Interface & Reporting?

Agent UI

Agents access the WFM Web Agent UI with a supported browser. There is no Java in this UI. See Supported Operating Environment Guide for specific browser support.

Reporting

Real-time Reporting

The following figure shows the reporting flow:
Approved, authorized staff can generate, schedule, and distribute out-of-the-box reports in the following categories:

- Configuration
- Forecast
- Performance
- Schedule
- Adherence
- Audit

The Genesys WFM product contains a number of out-of-the-box real-time reporting elements. Details can be found in the Workforce Management Administrator Guide.

Historical Reporting

The Genesys WFM product contains a number of out-of-the-box historical reporting elements. Details can be found in the Workforce Management Administrator Guide.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workforce Engagement</td>
<td>Digital</td>
<td>Optional</td>
<td>Exceptions</td>
</tr>
<tr>
<td>• Genesys Workforce Scheduling for Voice (EE01)</td>
<td>• Genesys Work and Lead Distribution (BO02)</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>• Genesys Omnichannel Workforce Scheduling (EE02)</td>
<td>• Genesys Task Distribution-Workgroup (BO03)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Genesys Personalized Task Distribution (BO04)</td>
<td></td>
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</tr>
</tbody>
</table>
Genesys Back-office Scheduling (EE26) for Genesys Engage on premises

Document Version

- Version v 1.1.3 last updated July 12, 2021
Genesys WFM Third-Party Integration (EE27) for Genesys Engage on premises

Enable bi-directional Integration of WFM with 3rd party systems

What's the challenge?

Your organization has systems in place, like Human Resources or Payroll Management systems. The addition of a Workforce Management tool requires many of the same data elements that these systems use, which results in redundant data management. This causes frustration and unnecessary work for your IT personnel.

What's the solution?

The Genesys WFM Solution includes an API that provides bi-directional integration between the Genesys WFM Solution and your existing systems, allowing automated synchronization of the two. This eliminates the need for redundant data management, resulting in improved system performance and happier IT personnel.

Other offerings:
Genesys Engage cloud

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 and Distribution Logic
• 5 User Interface & Reporting?
Genesys WFM Third-Party Integration (EE27) for Genesys Engage on premises

- 5.1 Agent UI
- 5.2 Reporting

- 6 Customer-facing Considerations
  - 6.1 Interdependencies
  - 6.2 Document Version
Use Case Overview

Story and Business Context

Organizations often already have third-party systems that contain many of the same data elements that Genesys Workforce Management needs to perform its functions. These systems might include wage and time-off information found within a Human Resources (HR) or Payroll Management System. The Genesys WFM Solution includes an API that provides bi-directional integration between the Genesys WFM Solution and the existing systems, allowing for automated synchronization between the two and eliminating the need for redundant data management.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reduced Administration Costs</td>
<td>Real-time synchronization between WFM and payroll, CRM or HR systems eliminates data administration effort and reduces costs.</td>
</tr>
</tbody>
</table>

Summary

The Genesys WFM API provides server-side integration between the Genesys Workforce Management solution and third-party systems.
Use Case Definition
Genesys WFM Third-Party Integration (EE27) for Genesys Engage on premises

Business Flow
Business Flow Description

1. Identify the data elements that need to be synchronized.
2. Confirm the third party system provides access to the needed data element.
3. Define the most appropriate methodology for synchronizing the data elements:
   • Frequency
   • Data exchange medium
4. Create and implement integration.
Genesys WFM Third-Party Integration (EE27) for Genesys Engage on premises

Business and Distribution Logic

Business Logic
N/A

Distribution Logic
N/A

User Interface & Reporting?

Agent UI
N/A

Reporting

Real-time Reporting
N/A

Historical Reporting
N/A

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
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<tr>
<td></td>
<td>• Genesys Workforce Scheduling for Voice (EE01)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### All of the following required:
- Genesys Omnichannel Workforce Scheduling (EE02)
- Genesys Back-office Scheduling (EE26)

### At least one of the following required:
- Genesys Omnichannel Workforce Scheduling (EE02)
- Genesys Back-office Scheduling (EE26)

### Optional

### Exceptions

#### General Assumptions

**Required Development Resources (one or more of the following):**
- Genesys Professional Services developer
- Customer-provided developers
- Third-Party System Integrator developer

#### Document Version
- Version v 1.0.3 last updated July 12, 2021
Genesys Task-based Scheduling (EE28) for Genesys Engage on premises

Control the scheduling of the sequence of task agents work on

What's the challenge?
Within your contact center, you don't have the ability to optimize scheduling of certain tasks. For example, you may want your agents to do certain tasks only when they are not needed for higher priority work resulting in increased costs and decreased productivity.

What's the solution?
Task sequencing allows your administrators and management teams to utilize workforce management to create sequences of events that can be scheduled on a regular basis.

Other offerings:
Genesys Engage cloud

Contents

• 1 What’s the challenge?
• 2 What’s the solution?
• 3 Use Case Overview
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• 4 Use Case Definition
  • 4.1 Business Flow
  • 4.2 Business and Distribution Logic
• 5 User Interface & Reporting?
  • 5.1 Agent UI
5.2 Reporting

6 Customer-facing Considerations
   - 6.1 Interdependencies
   - 6.2 Document Version
Use Case Overview

Story and Business Context

Some customer experience environments need to control the scheduling and sequencing of specific tasks. For example, schedulers may wish to control which activities, channels, or tasks are worked on together or individually.

Task sequencing allows the administrators and management teams to utilize workforce management to create sequences of events that can be scheduled on a regular basis, removing the need for multiple edits to align schedules to sequencing requirements.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Customer Experience</td>
<td>Schedulers can prioritize activities by type of work so that non-customer facing tasks do not negatively impact the customer experience.</td>
</tr>
<tr>
<td>Improved Employee Utilization</td>
<td>Schedulers can ensure that certain types of tasks are incorporated into the agent's day and when those tasks are performed.</td>
</tr>
</tbody>
</table>

Summary

Task Sequences guarantee that a specific period of time is spent on specified types of work throughout the day.
Use Case Definition
Genesys Task-based Scheduling (EE28) for Genesys Engage on premises

Business Flow
**Business Flow Description**

**CONFIGURATION:**

1. Create an Activity representing the desired task in question. Repeat for each desired Task. Some commonly configured tasks include:
   - Manual outbound dialing
   - Email-box cleanup
   - Manual correspondence
   - Customer Callbacks
2. Create an Activity Set.
3. Associate an Activity Task with the set.
4. Create a Shift Rule dictating how the Agents’ schedules can be optimized.
5. Create a Task Sequence within the Shift Rule dictating what order within the day Tasks should occur.
6. Associate Shift Rule with an existing Contract or Rotating Pattern in WFM.
7. Scheduler creates the Schedule Scenario.
8. Scheduler builds the schedule.
9. Scheduler publishes the schedule scenario to the Master Schedule.
Business and Distribution Logic

**Business Logic**

- Are Task Sequences needed?
- Can they be interrupted by meals?
- What are the minimum and maximum durations for the Tasks?
- Can they be optionally used?
- What order should the tasks occur in during the day?
- Do they need to be anchored to the start or end of the shift?

**Distribution Logic**

N/A

User Interface & Reporting?

**Agent UI**

Agents access the WFM Web Agent UI with a supported browser. There is no Java in this UI. See Operating Environment Guide for specific browser support.

**Reporting**

**Real-time Reporting**

The following figure shows the reporting flow:
Approved, authorized staff can generate, schedule, and distribute out-of-the-box reports in the following categories:

- Configuration
- Forecast
- Performance
- Schedule
- Adherence
- Audit

The Genesys WFM product contains a number of out-of-the-box real-time reporting elements. Details can be found in the Workforce Management Administrator Guide.

Historical Reporting

The Genesys WFM product contains a number of out-of-the-box historical reporting elements. Details can be found in the Workforce Management Administrator Guide.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workforce Engagement</td>
<td>Genesys Workforce Scheduling for Voice (EE01)</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>Genesys Omnichannel Workforce Scheduling (EE02)</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>Genesys Back-office Scheduling (EE26)</td>
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<td>None</td>
</tr>
</tbody>
</table>
Genesys Task-based Scheduling (EE28) for Genesys Engage on premises

Document Version

• Version v 1.0.3 last updated July 12, 2021
Genesys Compliance Recording (EE29) for Genesys Engage on premises

Enable your contact center to meet quality and/or regulatory compliance requirement

What's the challenge?

Your contact center needs to meet quality and/or regulatory compliance requirements with voice and screen recording. If you don’t, you risk penalties and damaged reputation.

What's the solution?

Record 100 percent of customer conversations with an agent for compliance and regulatory requirements, including access control, encrypted communications and long-term storage.

Other offerings:
- Genesys Engage cloud

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 and Distribution Logic
- 5 User Interface & Reporting?
  - 5.1 Agent UI
• 5.2 Reporting
• 6 Customer-facing Considerations
  • 6.1 Interdependencies
  • 6.2 Document Version
Use Case Overview

Story and Business Context

Genesys Interaction Recording is a compliance and control platform based on Genesys SIP, the T-Lib protocol, and the Genesys proprietary event model. Fully integrated to the CIM platform, Genesys Interaction Recording provides economies and powerful recording control via a host of integrations across the suite. This solution enables the modern contact center to record the entire customer interaction, enabling the contact center to meet quality and/or regulatory compliance requirements.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Customer Experience</td>
<td>Provides consumer protection, trust and transparency.</td>
</tr>
<tr>
<td>Reduced Penalties and Fines</td>
<td>Recording 100% of calls with no lost calls reduces compliance risk and penalties.</td>
</tr>
</tbody>
</table>

Summary

This use case provides 100% voice recording of customer conversations with an agent for compliance and regulatory requirements, including access control, encrypted communications, and long-term storage.
Use Case Definition
Genesys Compliance Recording (EE29) for Genesys Engage on premises

Business Flow
Business Flow Description

1. Customer makes a call to one of the service lines of the company.

2. An announcement is played to the customer that the call is going to be recorded. (*Compliance step)

3. The call is handled and routed to an agent following the logic of the Inbound Voice distribution strategy that is implemented for the Service Line. This can be either the use case or .

4. Genesys Interaction Recording starts the recording.
   - The interaction is recorded with reliability. (*Compliance step)
   - The communication between components is secured. (*Compliance step)

5. Agent answers the call from any desk within the site.
   - The agent may (if enabled) pause and resume the recording manually via the standard integration with Genesys Workspace when sensitive data needs to be entered.

6. Customer or Agent disconnects the call.

7. Genesys Interaction Recording stops and stores the recording.
   - The recording is encrypted, and is stored encrypted at rest. (*Compliance step)

8. Supervisor searches for, retrieves, and listens to a recording made by one of their agents.
   - Access to the recording is controlled. (*Compliance step)
   - User access and activity is available for audit. (*Compliance step)

9. Legal and Compliance officer checks the system for compliance and retrieves recordings for legal purposes.

10. Genesys Interaction Recording archives and purges recordings according to the rules defined in the system.
Business and Distribution Logic

Business Logic

Metadata

Metadata are tags that are added to the recording and allow precisely targeted interaction search and selection for evaluation and analysis. What data is available depends on the distribution logic implemented in your environment.

Archiving and Purging Criteria

Recordings can be archived and/or purged from the system after a specified time. After recordings have been purged, they are no longer available for supervisors or compliance officers from the Genesys user interface. The corresponding policies are configured during setup. This use case provides one set of rules that are valid for all recorded calls. GIR does not manage archived files. It is the customer's responsibility to set up the lifecycle policy of these archives and purge them after the lifecycle period.

Access Control

Access control to recordings is managed by user roles and associated permissions as well as by the organizational hierarchy defined for the individual agents. This use case includes a default set of roles that can be provided upon request.

Encrypted Recordings

When configuring encryption, you are responsible for backup of the private key. If the private key becomes lost or corrupt, any recording encrypted using that key become unusable.

If screen recording is also used in the deployment, a screen recording certificate must also be provisioned.

Encrypted Communications

Communications between GIR components occur on a secure channel.

When configuring encrypted communications, TLS, you should follow your own company's security policies for creating and signing certificates.

Health and Alarming

Log level alarming is present for the critical components within GIR. MCP utilizes the SNMP MA for trap capture and upstream messaging.

Distribution Logic

N/A
User Interface & Reporting?

Agent UI

The agent will have the optional capability to pause/resume a recording when confidential information is passed via the call via his agent desktop.

Auditing is provided by templates in the SpeechMiner UI (business interface), which is part of Genesys Interaction Recording. Genesys Interaction Recording provides audit logs for recording access. These audit logs contain the following information:

- Who accessed a recording
- Which recording
- When accessed
- Deletions
- Playback requests
- Exports
- Report exports
- Customer ID
- Interaction Type
- Reason Code
- All attached metadata
- Archive and Purging logs

Reporting

Real-time Reporting
N/A

Historical Reporting
N/A

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.
### All of the following required:

<table>
<thead>
<tr>
<th>Workforce Engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Genesys Voice Recording (EE07)</td>
</tr>
<tr>
<td>• Genesys Voice and Screen Recording (EE08)</td>
</tr>
<tr>
<td>Optional</td>
</tr>
<tr>
<td>None</td>
</tr>
</tbody>
</table>

### Exceptions

None

---

### General Assumptions

- The Record Interactions – Base package supports 100% voice recording at the DN level only (no other recording methods).
- Apache is the only load balancer currently supported for GIR.
- GIR MCPs will not be shared with GVP.
- SNMP MA will be configured for each MCP.
- The following activities are out of scope:
  - Configuration of network at its final state: SBC, Media Gateways, VLANs, Firewalls, NAT, Trunking services, etc.
  - Configuration or setup of additional Load Balancer software/hardware (DNS method or other)
  - Load balancing or cluster for API Servers
  - Setup of lifecycle policy for archived files
  - Installation of the standard out-of-the-box WDE
  - Customization of other desktop application to enable Dynamic Recording
  - High Availability for the Apache load balancer
  - Provisioning of recordings from other vendors

---

### Document Version

- Version v 1.0.3 last updated July 12, 2021
Genesys Selective Recording (EE30) for Genesys Engage on premises

Deliver selective recording of your agents based on metadata for review purposes

What's the challenge?
You need selective recording of agents for review purposes based on metadata such as percentage-based, business-unit based, and customer type-based interactions. Without this, you can’t monitor and improve team performance.

What's the solution?
With Genesys Selective Recording, you can define recording rules to capture the interactions that matter most to you.

Other offerings:
Genesys Engage cloud

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 and Distribution Logic
5 User Interface & Reporting?
   5.1 Agent UI
• 5.2 Reporting
• 6 Customer-facing Considerations
  • 6.1 Interdependencies
  • 6.2 Document Version
Use Case Overview

Story and Business Context

Genesys Interaction Recording is a compliance and control platform based on Genesys SIP, the T-Lib protocol, and the Genesys proprietary event model. Fully integrated to the CIM platform, Genesys Interaction Recording provides economies and powerful recording control via a host of integrations across the suite.

This solution enables the modern contact center to record selective customer interaction, allowing the contact center to improve recording control and target discreet interactions for recording.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reduced Administration Costs</td>
<td>Target recording by percentage, type of call or customer according to business need.</td>
</tr>
<tr>
<td>Reduced IT Operational Costs</td>
<td>Lower hardware footprint and storage requirements than for &quot;blanket&quot; recording.</td>
</tr>
</tbody>
</table>

Summary

This use case allows for selective recording of agent for review purposes based on metadata such as percentage-based, business-unit based, and customer type-based interactions.
Use Case Definition
Genesys Selective Recording (EE30) for Genesys Engage on premises

Business Flow
Business Flow Description

1. Customer makes a call.
2. IVR announces recording.
3. Call is processed according to the inbound use case.
4. Selective recording metadata triggers are met: percentage, business unit, customer type, language.
5. Call is routed according to the inbound use case, with the recording flag set.
6. Interaction Recording starts recording.
   - Agent pauses or resumes the recording.
7. Customer or agent disconnects the call.
8. Interaction Recording stops and stores the recording.
9. Supervisor listens to the recording.
10. Interaction Recording archives and purges the recordings.
Business and Distribution Logic

Business Logic

Details of the business flow described in the previous section depend on how the system is set up for your environment. This section describes the available options and how Genesys Professional Services does the initial setup for your environment.

Metadata

Metadata are tags that are added to the recording and allow precisely targeted interaction search and selection for evaluation and analysis. What data is available depends on the distribution logic implemented in your environment.

Archiving and Purging Criteria

Recordings can be archived and/or purged from the system after a specified time. After recordings have been purged, they are no longer available for supervisors or compliance officers from the Genesys user interface. The corresponding policies are configured during setup. This use case provides one set of rules that are valid for all recorded calls. GIR does not manage archived files. It is the customer's responsibility to set up the lifecycle policy of these archives and purge them after the lifecycle period.

Access Control

Access control to recordings is managed by user roles and associated permissions as well as by the organizational hierarchy defined for the individual agents. This use case includes a default set of roles that can be provided upon request.

Pause / Resume recording

The ability for an agent to pause / resume a recording from his agent desktop is enabled or disabled based on customer requirements.

Routing Rule

The rule by which the decision to record is set. Requires a decision block within the routing strategy prior to the TRouteCall.

Configure the TRouteCall request in the routing strategy to include the key record, with the values:

• destination for agent-side recording—Recording stops when the agent transfers the call, unless recording is set up on the new routing point.

• source for customer-side recording—Recording stops when the customer leaves the call.

Attached Data

Add the following attached data key to prescribe the partitions with which the recording is to be associated.

• GRECORD_PARTITIONS
Distribution Logic

N/A

User Interface & Reporting?

Agent UI

Using Agent Desktop, the agent can pause or resume a recording when confidential information is passed via the call.

Reporting

Real-time Reporting

N/A

Historical Reporting

Historical reporting is provided by templates in the SpeechMiner UI (business interface), which is part of Genesys Interaction Recording.

In addition to the historical reporting, Genesys Interaction Recording provides audit logs for recording access. These audit logs contain the following information:

- Who accessed a recording
- Which recording
- When accessed
- Deletions
- Playback requests
- Exports
- Report exports
- Customer ID
- Interaction Type
- Reason Code
- All attached metadata
- Archive and Purging logs
Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

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<tr>
<th>All of the following required:</th>
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<tr>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

General Assumptions

• The Record Interactions – Base package supports up to 100% selective voice recording based on Recording Rules, at the DN level only (no other recording methods).
• Apache is the only load balancer currently supported for GIR.
• GIR MCPs will not be shared with GVP.
• The following activities are out of scope:
  • Configuration of network at its final state: SBC, Media Gateways, VLANs, Firewalls, NAT, Trunking services, etc.
  • Configuration or setup of additional Load Balancer software/hardware (DNS method or other)
  • Load balancing or cluster for API Servers
  • Configuration of External Storage system (such as SAN / NAS)
  • Setup of lifecycle policy for archived files
  • Installation of the standard out-of-the-box WDE
  • Customization of any other desktop application to enable Dynamic Recording
  • High Availability for the Apache load balancer
  • Provisioning of recordings from other vendors
Genesys Selective Recording (EE30) for Genesys Engage on premises

Document Version

- Version v 1.0.3 last updated July 12, 2021
Genesys Agent Assist (EE31) for Genesys Engage on premises

**Important**
PS material for this use case has not been finished. The capabilities illustrated in this case are part of the Early Adopter Program (EAP), reference the EAP announcement for details.

Monitor customer and agent conversations to provide the agent with contextually relevant suggestions.

**What's the challenge?**

Many customers prefer to use self-service options. But when they need to speak to someone, they expect that person to know all about their journey and how best to help them in real time.

**What's the solution?**

Provide live transcripts of the conversation, and relevant real-time knowledge suggestions on the agent's omnichannel desktop.

**Other offerings:**
Genesys Engage cloud

**Contents**

- 1 What's the challenge?
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- 3 Use Case Overview
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  - 3.2 Use Case Benefits*
  - 3.3 Summary
• 4 Use Case Definition
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• 5 User Interface & Reporting?
  • 5.1 Agent UI
  • 5.2 Reporting
• 6 Customer-facing Considerations
  • 6.1 Interdependencies
  • 6.2 Document Version
Use Case Overview

Story and Business Context

A positive customer experience relies on the ability of the company or provider to answer a customer's request, provide excellent service and deliver on the requested outcome. Contact centers are often the single point of contact for customers and it is critical that these interactions are properly and effectively handled. Agents need to navigate a plethora of systems and resources to find answers and resolve customer inquiries - time that could be better spent on activities that improve customer service or sales outcome.

With Agent Assist, companies can rely on the power of Artificial Intelligence to display a real-time transcription of the voice call and present relevant and timely suggestions to the agent. The agent spends time assisting the customer based on the suggested results, rather than digging for information across the various systems. An agent may provide feedback (in the form of marking the suggestion as Relevant or Irrelevant) on the suggestions returned by Google CCAI to improve the knowledge base for future use.

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:

<table>
<thead>
<tr>
<th>Use Case Benefits</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Employee Satisfaction</td>
<td>Agents tackle more complex business inquiries with AI assistance.</td>
</tr>
<tr>
<td>Improved Employee Utilization</td>
<td>Agents are trained in real time through a constantly evolving knowledge base.</td>
</tr>
<tr>
<td>Improved First Contact Resolution</td>
<td>Present relevant suggestions in real-time to help the agent resolve the customer's inquiry.</td>
</tr>
<tr>
<td>Reduced Handle Time</td>
<td>By empowering agents to more effectively provide answers, customers enjoy a quicker, more positive experience.</td>
</tr>
</tbody>
</table>

Summary

During a call between a customer and an agent, relevant, real-time suggestions are presented to the agent in their agent desktop, to assist them on the job. Contextually relevant knowledge suggestions, such as answers to frequently asked questions are presented to the agent in real time. The knowledge empowers the agent, provides the right information at the right time, and enables the agent to provide better support to a customer.
Use Case Definition

Business Flow

Proactive Knowledge Surfacing
Business Flow Description

1. Genesys connects the customer to the live agent
2. Agent sees the context (for example bot intents and slots) of the customer's journey in the agent desktop
3. Genesys Agent Assist monitors the voice conversation
4. During the voice conversation, the following happens:
   • Real-time audio of the voice interaction is streamed to Google Agent Assist service
   • Real-time transcription of the voice call is displayed in agent desktop
   • Google Agent Assist service returns real-time knowledge suggestions
   • The suggested content is displayed to the agent automatically in a live stream of suggestions during the conversation
5. The agent can do the following with the live stream of suggestions:
   • Click to expand the suggested content, or click the address to open the full knowledge article (BL1)
   • Read the suggested content directly to the customer, or use it to assist with the interaction (BL2)
   • Share the recommended content, by email, SMS, WhatsApp, or other channels*
6. Agent can rate (upvote/downvote) to improve the AI suggestions model over time. The more that Agent Assist is used and content rated by agents, the better the suggestions will be in the future. (BL3, BL4)

* Sharing content - future.
Business and Distribution Logic

Business Logic

**BL1: Review knowledge:** Agent needs to perform a high-level assessment to ensure the information returned from Agent Assist is appropriate and relevant to the current conversation.

**BL2: Leverage knowledge:** Agent communicates relevant information to the customer, or, they use the information to perform the required "back-end" actions to resolve the customer issue.

**BL3: Rate knowledge:** An agent may be presented with multiple pieces of information during the interaction. Agents should rate the information using the thumbs up / thumbs down buttons to mark as *Relevant* or *Irrelevant*. Any information not rated is checked as *Unspecified*.

**BL4: Resolve issue or continue conversation:** If the customer issue is not adequately resolved, the agent continues the conversation with the customer to trigger Agent Assist to surface additional information. If Agent Assist is unable to provide appropriate information to resolve the customer issue, Agents should follow their corporate escalation policy to ensure that customer expectations are fulfilled.

Distribution Logic

Since the customer is already speaking with an agent in real time, any subsequent call steering is likely to be manually directed by the agent.

User Interface & Reporting?

**Agent UI**

*Workspace Desktop Edition with Agent Assist plugin enabled*

**Reporting**

**Real-time Reporting**

Customers can use their existing call reporting infrastructure.

**Historical Reporting**

Customers can use their existing call reporting infrastructure.
Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<table>
<thead>
<tr>
<th>All of the following required:</th>
<th>At least one of the following required:</th>
<th>Optional</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Inbound</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>• Genesys Call Routing (CE01)</td>
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<td>None</td>
</tr>
<tr>
<td><strong>Self-Service and Automation</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>• Genesys Chatbots (CE31)</td>
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</tr>
<tr>
<td>• Genesys Voicebots (CE41)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

General Assumptions

Must be an Engage Hybrid customer with English (US-En) speaking agents.

Utilizes Agent Assist backend integration hosted in Genesys Cloud.

Document Version

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