GENESYS™

Genesys Engage On-Premises Use Cases

Genesys Task Distribution-Workgroup (BO03) for Genesys Engage on premises

5/13/2026

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.

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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:

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

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:
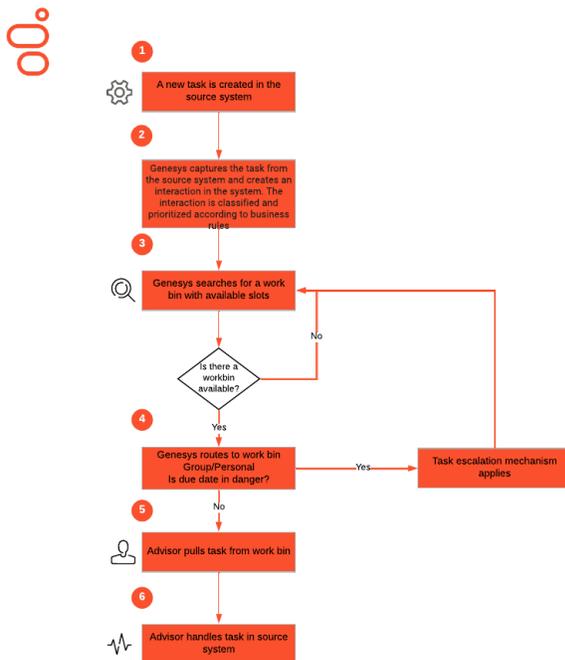
Business Flow Description

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.

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:

Workitems Escalated	Escalation Percentage
44	20%

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
Digital • Genesys Work and Lead Distribution (BO02)	None	None	None

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

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