GENESYS™

Genesys Engage On-Premises Use Cases

Genesys Personalized Task Distribution (BO04) for Genesys Engage on premises

7/14/2025

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

- 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:

Use Case Benefits	Explanation
Improved Agent Competency	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
Improved Customer Experience	Deliver all committed tasks on time to customers
Improved Employee Utilization	Reduce idle time and improve Average Handle Time through an additional third-party data lookup

Use Case Benefits	Explanation
	feature that enables context-based prioritization and routing
Improved First Contact Resolution	Provide more timely and complete insights through distribution of tasks with the full customer context
Reduced Administration Costs	Automate task distribution, reduce manual distribution and supervisor task-monitor; schedule and report through intelligent task distribution
Reduced Interaction Transfers	Reduce interaction transfers by analyzing the impact of distribution on task transfers

Summary

This use case builds on the use case Genesys Work and Lead Distribution (BO02) for Genesys Engage on-premises, 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 webservices 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).
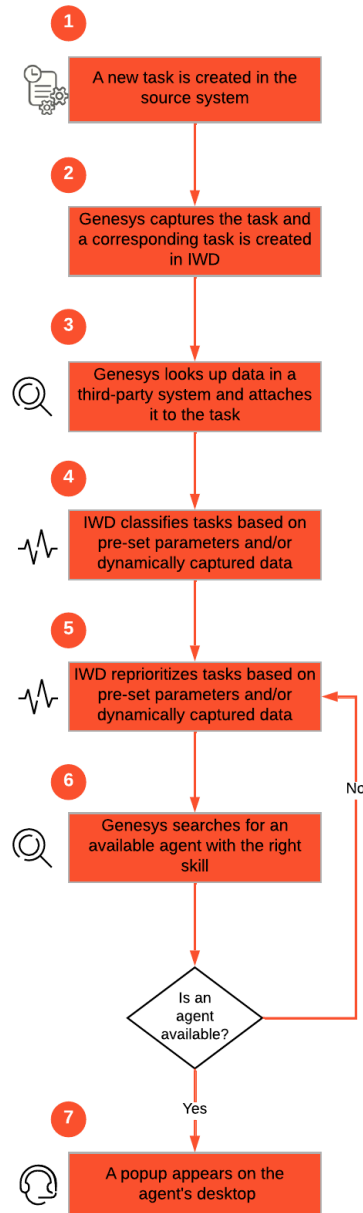
Use Case Definition

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 and Distribution Logic

Business Logic

In addition to the business logic from BO02, this use case makes the attributes from the customer

1

A new task is created in the source system

2

Genesys captures the task and a corresponding task is created in IWD

3

Genesys looks up data in a third-party system and attaches it to the task

4

IWD classifies tasks based on pre-set parameters and/or dynamically captured data

5

IWD reprioritizes tasks based on pre-set parameters and/or dynamically captured data

6

Genesys searches for an available agent with the right skill

No

Is an agent available?

Yes

7

A popup appears on the agent's desktop

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 .

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 Workspace 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 Workspace interaction views, pop-up notifications, and Contact and Interaction histories.
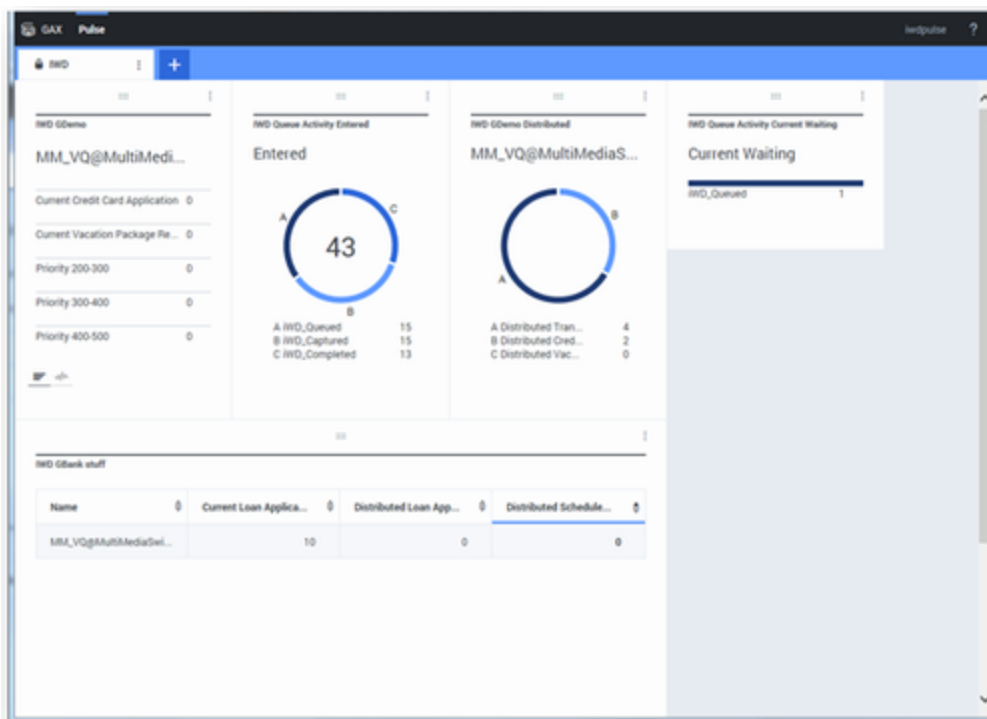
Reporting

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.

All of the following required:	At least one of the following required:	Optional	Exceptions
Digital • Genesys Work and Lead Distribution (BO02)	None	**Digital** • Genesys Task Distribution-Workgroup (BO03)	None

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 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 Workspace

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 1.2.5** last updated **July 14, 2025**