Genesys Engage On-Premises Use Cases

Genesys KPI Insights (BO07) for Genesys Engage on premises

12/20/2025

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

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:

Use Case Benefits	Explanation
Improved First Contact Resolution	Provide visibility into call repetition pattern in reports
Increased Revenue	Isolate and track anomalies to facilitate root-cause analysis to remedy issues
Reduced Administration Costs	Increase visibility into training needs and skills-based routing through better reporting data. Provide readily available reports through KPI-based reporting
Reduced Interaction Transfers	Reduce transfers because of additional visibility attained through KPIs that help identify areas of training and skills-based routing optimization

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 on 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 and Distribution Logic

Business Logic

Parameters and Business Rules

BL1: Assign reports to roles within the company

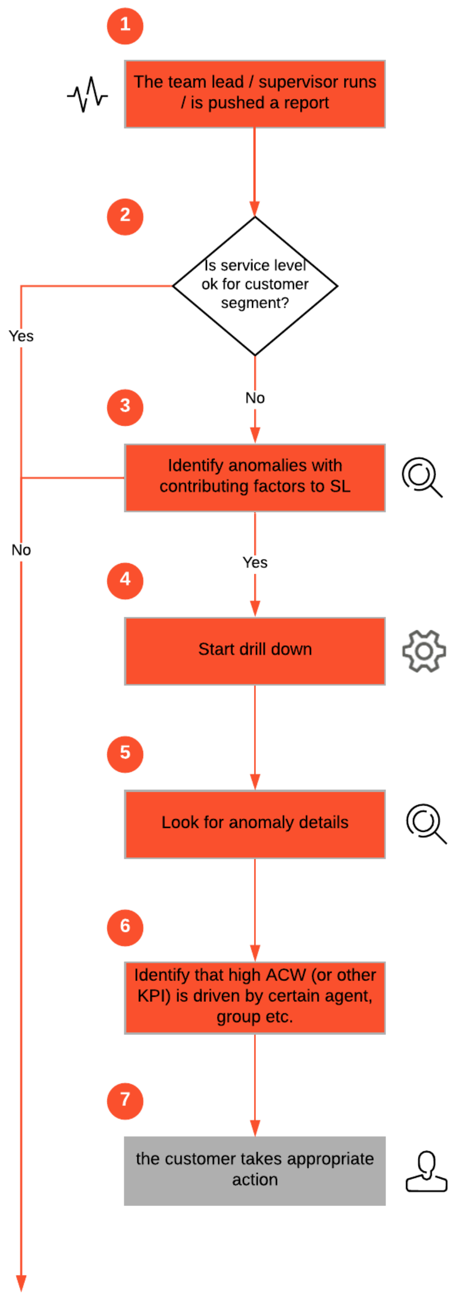
- The business decides during implementation and during operation which roles will receive reports pushed out to the users and which roles can run ad hoc analysis. In this example the team leader has the ability to receive reports via email and then perform the ad hoc analysis.
- The roles are then assigned 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.



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.

- 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 its 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, intreactioninteraction 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 agents 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.

All of the following required:	At least one of the following required:	Optional	Exceptions
None	**Digital** • Genesys Email Routing (CE16) • Genesys Chat Routing (CE18) **Inbound** • Genesys Call Routing (CE01) • Genesys Personalized Routing (CE02)	None	None

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 form 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.

Document Version

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