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Genesys Engage On-Premises Use Cases

Genesys Call Routing (CE01) for Genesys Engage on premises

10/1/2023

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:

PureConnect

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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 automaticity 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:

Use Case Benefits	Explanation
Improved Customer Experience	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
Improved First Contact Resolution	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.
Increased Revenue	The ability to route a sales calls to the best skilled sales representative increases sales conversions.
Reduced Handle Time	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.
Reduced Transfers	Reduce the number of transfers due to better voice call routing through Genesys routing.

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 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

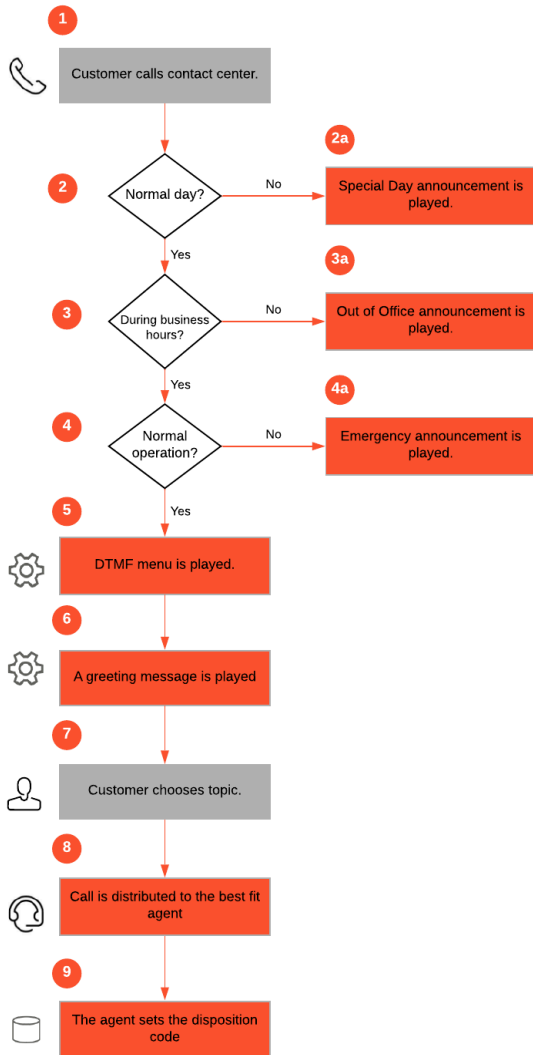
The following parameters can be configured by service line:

Name	Description
Business hours	Sets the hours that you are open and accepting calls
Special day	A list of exceptions to the regular open hours, for a holiday or other reason
Emergency declared	Activates the emergency announcement (i.e. power outage, general closure)

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



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.

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.

Name	Description
Primary Target	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.
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.

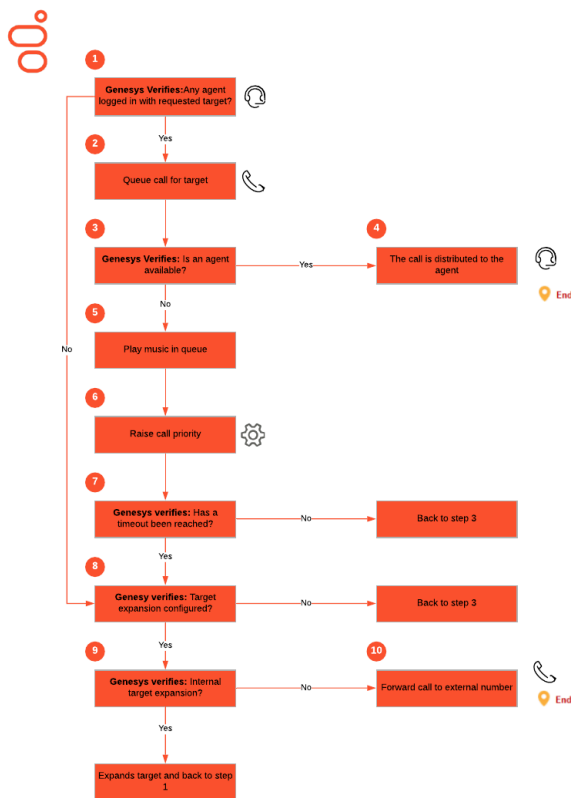
Name	Description
Department	Business organization used as a category for reporting
Flow	A business flow used as a category in reporting
Intent Category	Business categories typically used as the top level of the call steering menu choices

Audio Resources

The following audio resources are configurable by service line:

Name	Example
Business Hours	A message announcing office closure and inviting to call again at opening time
Please Wait on Hold	A message inviting to wait
Welcome	A Greeting message
Emergency	An emergency message
Special Day	A message announcing office closure due to special day (i.e. a bank holiday)
Music waiting in queue	Music
Main DTMF Menu Message	The main Call Steering menu announcement
Sub-DTMF Menu Messages (multiple messages)	The sub-menu messages for the Call Steering as required.

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 Workspace 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 use 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 consults interactions that are processed within the contact center for a range of days that you specify, and illustrates the percentage of interactions accepted by agents.
- **Queue Outline Report** and **Queue Summary Report** — Collect detailed counts related to customer interactions and consult interactions, showing how the number of interactions/consultations that entered a particular queue or queue group 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.

All of the following required:	At least one of the following required:	Optional	Exceptions
None	None	None	None

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.
- 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 workspace.
- 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 Workspace

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

- [Agent Workspace 9 Help](#)
- [How Agent Workspace Works](#)

Workspace Desktop Edition

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

- [Workspace Desktop Edition Agent Help](#)
- [Workspace Desktop Edition User's Guide](#)

Document Version

- Version **v 1.2.3** last updated **October 1, 2023**