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Genesys Engage On-Premises Use Cases

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:

PureConnect

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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:

| Use Case Benefits | Explanation |
|-----------------------------------|---|
| Improved Containment Rate | Help customers service themselves quickly and easily so they don't want to speak to an agent. |
| Improved Customer Experience | Personalized menus and prompts simplify the IVR, make it more effective for customers and make them feel more valued. |
| Improved First Contact Resolution | Offering the most appropriate options to each customer increases first contact resolution. |
| Reduced Handle Time | The time required to address a customer inquiry or request is optimized. |
| Reduced Interaction Abandonment | Reduce number of callers abandoning while in queue by enabling easier to use IVR. |

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.

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- 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:

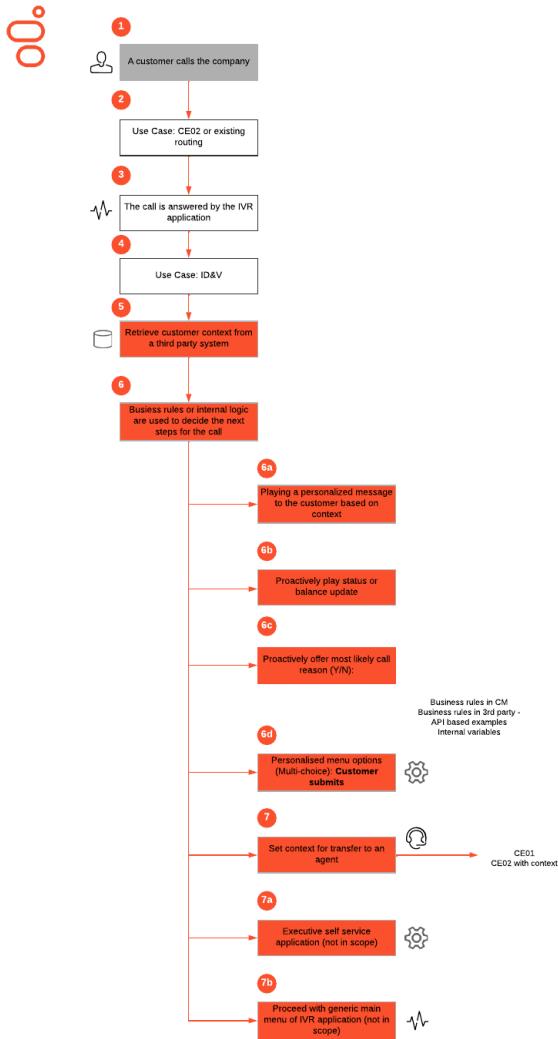
Business and Distribution Logic

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

| Name | Description |
|-----------------------|--|
| Dialed Number | The number the caller dialed. |
| CLI | Calling Line Identifier - The number the caller is dialling from (also known as Automatic Number Identification - ANI). |
| Recent Failure Flag | 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. |
| Random Percentage | 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. |
| Last Result | 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. |
| Number of Calls Today | The number of times the customer has called into this callflow today. |



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.

| | |
|---------------------------------|--|
| Number of Calls in Last Week | The number of times the customer has called into this callflow in the last week. |
| Number of Calls in Last 2 Weeks | The number of times the customer has called into this callflow in the last 2 weeks. |
| 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:

| Name | Description |
|-------------------------------|--|
| Equal to | Compare variable with a value to see if they are equal. |
| Not equal to | Compare variable with a value to see if they are not equal. |
| Containing | Compare variable with a value to see if the variable contains the value. |
| Not containing | Compare variable with a value to see if the variable doesn't contain the value. |
| Matching pattern | Compare variable with a value to see if the variable matches the pattern in the variable. |
| Not matching pattern | Compare variable with a value to see if the variable does not match the pattern in the variable. |
| Starting with | Compare variable with a value to see if the variable starts with the value. |
| Not starting with | Compare variable with a value to see if the variable doesn't start with the value. |
| Ending with | Compare variable with a value to see if the variable ends with the value. |
| Not ending with | Compare variable with a value to see if the variable ends with the value. |
| In list (comma separated) | Compare variable with a comma separated list to see if the variable is one of the values in the list. |
| Not in list (comma separated) | Compare variable with a comma separated list to see if the variable isn't one of the values in the list. |
| Between | Compare variable with two values to see if the variable is between those two values. |
| Not between | Compare variable with two values to see if the variable is not between those two values. |

| | |
|--------------------------|---|
| Greater than | Compare variable with a value to see if the variable is greater than the value. |
| Greater than or equal to | Compare variable with a value to see if the variable is greater than or equal to the value. |
| Less than | Compare variable with a value to see if the variable is less than the value. |
| Less than or equal to | Compare variable with a value to see if the variable is less than or equal to the value. |
| Blank | Check to see if variable is blank. |
| Not blank | Check to see if variable is not blank. |

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.

| All of the following required: | At least one of the following required: | Optional | Exceptions |
|---|---|----------|------------|
| Self-Service and Automation <ul style="list-style-type: none"> • Genesys Customer Authentication (CE07) | Inbound <ul style="list-style-type: none"> • Genesys Call Routing (CE01) • Genesys Personalized Routing (CE02) | None | None |

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.
- 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 1.1.4** last updated **February 6, 2026**