



# Genesys Engage On-premises Use Cases

Genesys Outbound Dialer (CE11) for Genesys Engage on premises

10/31/2020

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# Improve customer communications and increase sales conversion using powerful dialer capabilities

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## Use Case Overview

### Story and Business Context

A company needs to make outbound calls to initiate contact with its customers based on specific business rules for sales, marketing, care, or collections. This use case describes the ability to configure and execute outbound dialing campaigns – both automated and agent-assisted – based on customer-provided contact list(s).

Generating new business and upselling existing customers is a critical part of any business. Sales and marketing organizations are challenged with improving the efficiency of their team members; increasing reach, contact rates, response rates, and revenue; and complying with industry regulations.

#### ***Happier Agents***

- Predictive dialing is used when appropriate to improve agent efficiency and satisfaction by removing low-value calls and wasted time.
- Productive and highly utilized agents have more opportunities to serve customers, close business, and meet their sales quotas.

#### ***Happier Legal Team***

- Compliance and business rules are accurately maintained to ensure enterprise-wide contact strategy adherence.

#### ***Improved Effectiveness / Higher Return on Investment***

- Improved Return on Investment of outbound sales and marketing campaigns (such as telemarketing; upsell/cross-sell; customer win-back; loyalty/promotions) and outbound campaigns.
- Leads are routed to sales agents within seconds (not minutes, hours or days) since "speed to lead" follow up is crucial in many sales environments, driving lead contact rates and conversion rates while decreasing call abandonment rates.
- Sales departments use predictive, progressive, and/or preview dialing modes instead of making manual dials, and outbound call volume is efficiently paced, which results in more sales conversations and increased agent productivity.

### Use Case Benefits\*

Use Case Benefits	Explanation
Improved Employee Occupancy	Improved agent/employee occupancy by leveraging them for outbound campaigns. Increasing the number of right parties connected through predictive dialing, optimizing the number of agent-handled calls.
Improved Net Promoter Score	Improved customer experience by proactively contacting customers and prospects with targeted or personalized offers and special promotions
Increased Revenue	Increased revenue by improving performance of outbound campaigns

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Use Case Benefits	Explanation
Reduced IT Operational Costs	Reduced IT dependency and empowering Business User management of campaigns
Reduced Volume of Interactions	Reduced volume of interactions by proactively sending communications through outbound channels

## Summary

The Genesys system supports both agent-assisted and automated outbound calling campaigns using dialer and outbound IVR channels. Dialer calls can be made in predictive, progressive, preview (Push/Pull), Outbound IVR modes (Power/Fixed, Predictive, Progressive), or manual mode. The company can use its marketing, CRM, or collections system to generate contact lists based on a one-time event, recurring events, or trigger-based events. The lists include the appropriate contact details, such as contact name, contact phone number, and contact reason. Delivery results are recorded in the system to feed into reports.

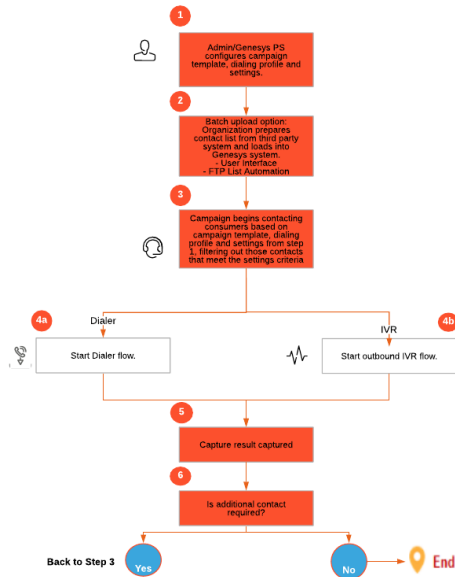
Sales and lead development reps are manually dialing customers and prospects for sales and marketing purposes, which is expensive and wastes time. Companies are managing communication in silos and don't have an integrated, outbound dialing campaign. All companies must follow industry regulations and manage for compliance risk.

## Use Case Definition

### Business Flow

#### (1) Business Flow

The following diagram shows the main flow of the use case:



**Business Flow Description** 1. The administrator or Genesys PS configures a campaign template, dialing profile, session profile, and settings in the Genesys system.

2. The organization prepares a contact list from a third-party system (such as a CRM), then uploads the list using batch upload, the user interface, or FTP list automation capabilities.

3. The Campaign Group begins contacting consumers based on the campaign template, dialing profile, and session profile from step 1, filtering out those contacts that meet the settings criteria defined in the dialing profile.

4a. For Dialer, the dialing mode is configured as Progressive, Predictive (seizing is optional and recommended), or Preview.

- In Preview mode, the agent receives or retrieves a record and the call is initiated by the agent.
- In Progressive mode, the system automatically places the call based on an agent being available for the specific campaign. 1-to-1 is the default for progressive mode. CX Contact also supports a progressive multiplier, 1-to-many.
- In Predictive mode, the system automatically places the call based on the pacing algorithm and expected agent availability.

For each call attempt, there are multiple potential results. For example:

- Bad Number or No Answer:
  - In Preview mode, the agent hangs up, and the disposition and the result are written back to the system.
  - In Progressive and Predictive modes, the call disconnects and the result is written back to the system.
- Answering Machine:
  - In Preview mode, the agent has the option to leave a message then disposition the call. Based on the call result code the call may be retried later. The result is written back to the system.

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- In Progressive and Predictive modes, the call either disconnects, bridges to an agent, or plays a message (based on the Destination DN configured in step 1) and the result is written back to the system.
  - Live Party (Call Result = Answered) connect: the agent is connected to the consumer.
    - The consumer can opt out. The agent records this result in the agent desktop and it is written to a system DNC list. Access to this DNC list requires a Care ticket and intervention.
    - The consumer can ask for a callback. The agent records this result in the agent desktop and the callback is scheduled.
  - At the end of the call, the agent records a disposition code and the result is written back to the system.
    - Call result status and record type are written to the list.
    - Info Mart and the BI Extract are required for agent disposition results.

4b. For Outbound IVR, there are multiple potential results. For example:

- Bad Number or No Answer - the call disconnects and the result is written back to the Genesys system (Info Mart and Contact List).
- Answering Machine - the call either disconnects or plays a message (based on the configuration chosen in step 1) and the result is written back to the Genesys system.
- Live Party connect - the call plays the Outbound IVR message.
  - The consumer can opt out of future calls, typically done by including "Press 9 to opt out of future calls".
  - Optionally, the administrator may choose to offer the option to connect to a live agent, typically done by including "Press 2 to connect to a live agent".
    - If the agent is part of the Genesys environment then calls can predictively be paced to keep the agent busy. Progressive mode is also available in a default 1-to-1

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or progressive multiplier 1-to-many configuration.

- If the agent is external to the Genesys environment, connection can also be achieved by routing to a phone number provided by the company, external to Genesys. In this case pacing is managed with the number of outbound calls in predictive or progressive (recommended) modes. Pacing cannot determine the availability of agents that are not part of the Genesys environment
  - *Consideration: Outbound voice trunks have limits and sizing should be considered to enable the proper dialing rate*
  - The result is written back to the Genesys system.

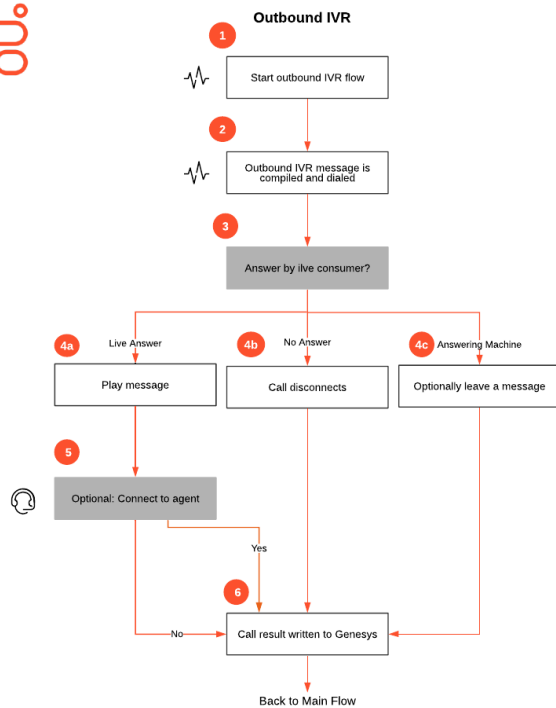
5. Call results are written back to the Genesys system and utilized to determine next actions.

6. Depending on the call result, additional contact attempts may be undertaken. If additional contact is required, the contact treatment configured in step 1 will continue at step 3. If no additional contact is required, the contact treatment ends.

## Business Flow

### (2) Outbound IVR

The following diagram shows the Outbound IVR subflow:



**Business Flow Description** For Outbound IVR, there are multiple resulting scenarios:

- Bad Number or No Answer - the call disconnects and the result is written back to the system.
- Answering Machine - the call either disconnects or plays a message (based on the chosen configuration in step 1) and the result is written back to the system.
- Live Party connect - the call plays the Outbound IVR message.
  - The consumer has the option to opt out of future calls. This is typically done by including “Press 9 to opt out of future calls”.
  - Optionally, the Customer Admin may offer the option to connect to a live agent (based on the chosen configuration). This is typically done by including “Press 2 to connect to a live agent”. This can be achieved by routing to a phone number provided by the company.
  - The result is written back to the system.

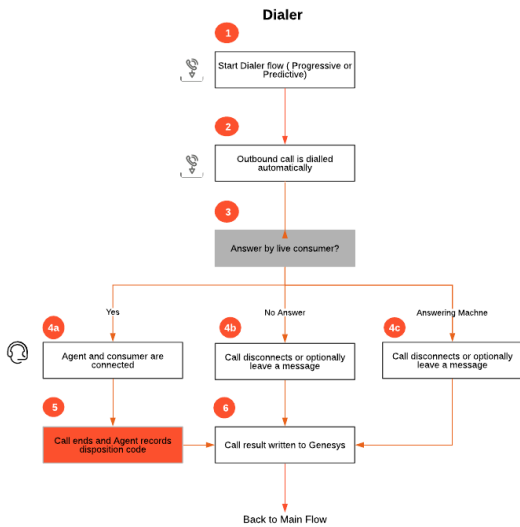


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## Business Flow

### (3) Dialer

The following diagram shows the Dialer subflow:



## Business Flow Description

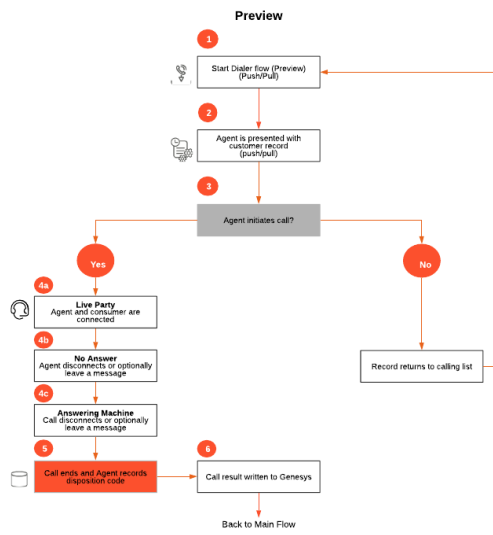
- For Dialer, the dialing mode is configured as Preview, Progressive, or Predictive.
  - In Preview mode, the agent receives or retrieves a record and initiates the call.
  - In Progressive mode, the system automatically places the call based on an agent being available for the specific campaign.
  - In Predictive mode, the system automatically places the call based on the pacing algorithm and expected agent availability
- For each call attempt, there are multiple resulting scenarios:
  - Bad Number or No Answer:
    - In Preview mode, the agent hangs up and the result is written back to the system.
    - In Progressive and Predictive modes, the call disconnects and the result is written back to the system.
  - Answering Machine:
    - In Preview mode, the agent has the option to leave a message. Based on the disposition code, the call may be re-tried later. The result is written back to the system.
    - In Progressive and Predictive modes, the call either disconnects or plays a message (based on the configuration chosen in step 1) and the result is written back to the system.
  - Live Party connect - the agent is connected to the consumer.
    - The consumer has the option to opt out. In cloud, the agent records this in the agent desktop and it is written to a suppression list or DNC list in the premise.
    - The consumer has the option to ask for a callback. The agent records this in the agent desktop and the callback is scheduled.
  - At the end of the call, the agent records a disposition code and the result is written back to the system.

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## Business Flow

### **(4) Preview**

The following diagram shows the subflow when preview mode is used:



**Business Flow Description** Based on the result of the call, additional contact attempts may be undertaken, either:

- in the same channel, or
- in another channel (Cloud only)

This is configured in the campaign settings in step 1.

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## Business and Distribution Logic

### Business Logic

## Parameters and Business Rules

### BL1:

#### Contact Records – Batch Upload

Contact records are batch uploaded, as configured by the customer administrator or Genesys PS based on the goals of the customer and the source of the contact. There is no limit to the number of contacts.

#### Channel Type – Dialer or Automated Outbound IVR

Customers can choose which channels to use in their campaigns: Dialer (agent-assisted) or Outbound IVR (automated). Channels are configured by the Customer Admin or Genesys PS prior to the list being uploaded. The Customer identifies the message content (or message template) for automated outbound calls.

#### Campaign Settings

The customer administrator or Genesys PS can configure various campaign settings: start/stop timing, frequency of contact per consumer, contact strategy, mobile filtering treatments, answering machine delivery options, connect to agent options, and assigned agent group.

#### Dialer Mode– Predictive, Progressive, Preview

Customers can choose to run dialer campaigns using Preview, Progressive, and/or Predictive modes, configured by the customer administrator or Genesys PS.

#### Answering Machine Detection

Genesys PS can tune aspects of the configuration such as listening for speech or tones, as well as the length of silence between phrases. Customers can choose whether to disconnect or to play a message when an answering machine is detected.

### BL2

#### Personalization

For Outbound IVR, the message or script may contain personalized information from a third-party or customer database, to be provided by the customer along with the list. The audio file is also provided by the customer.

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## Distribution Logic

### DR1

#### Outbound IVR - Connect to Agent Option

To enable transfer to an agent, option 1 requires the implementation of Genesys Call Routing (CE01) for Genesys Engage.

Option 2 connects through the customer's non-Genesys contact center. Calls are routed to a phone number provided by the customer.

## User Interface & Reporting?

### Customer Interface Requirements

N/A

### Agent Desktop Requirements

- Agent Desktop is Genesys Workspace Web Edition
- The agent can add contacts to the system DNC list via his desktop
- The agent can enter a disposition code for each call (such as Cross Sell, Need Follow Up, Not Right Skill, Processed, Terminated, Transferred, Up Sell). Disposition codes are configured by the customer administrator or Genesys PS (included within the corresponding use cases).
- Ability to schedule a call back to:
  - Personal call back
  - Campaign call back

## 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 dashboards.

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The following Genesys Pulse standard reports are particularly relevant for this use case:

- Campaign Activity — Displays the activity associated with outbound campaigns.
- Campaign Callback Status — Displays the information related to campaign initiated callbacks.
- Campaign Group Activity — Displays the activity associated with outbound Campaign Groups.
- Campaign Group Status — Displays the current state and duration associated with outbound campaign group activity.

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 by analyzing historical data KPIs that track agent occupancy, routing, handling, an disposition of interactions, and analyze the effectiveness of outbound campaigns and contact lists.

Some of the most relevant reports include:

- [Agent Outbound Campaign Report](#) — Captures total and average durations of call-handling activities, including Handle Time, Wrap Time, Preview Time, Engage Time, and Hold Time, for agents who participate in outbound campaigns.
- [Campaign Callbacks Summary Report](#) — Displays a summary of information about callback activity, including the total number of callbacks processed by the contact center, broken down into the total number scheduled, missed, and completed for each day of the reporting period. Focuses in outbound voice-only interactions.
- [Campaign Summary Report](#) — Summarizes key metrics, such as Accepted and Not Accepted, that illustrate the disposition of contact attempts associated with Outbound campaigns.
- [Contact List Effectiveness Report](#) — Provides detailed information about the number of contact attempts that were generated by an Outbound campaign.
- [Agent Not Ready Reason Code Report](#) — Provides an analysis of the amount of the time agents spent in a NotReady state, and can help you to identify the most common reasons given, the longest durations, and the agents who spend the most or least amount of time in the NotReady state.

For more information about the Genesys CX Insights reports, see the [Genesys CX Insights 9.0 User's Guide](#). Reports most relevant to this use case are found in the [Agents](#), [Outbound Contact](#), and [Detail](#) folders.

## Assumptions

### General Assumptions

- Campaign Group are assumed to be single-mode only, no escalating between modes. Modes applicable to this use case are:
  - o Progressive/Predictive (Dialer)
  - o Push/Pull Preview (Dialer)
  - o Outbound IVR
- Opt Out/In is assumed to be handled in the following way:

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1. For Outbound IVR calls, where the customer answers, there is an option to opt out of further calls. In some cases, this is required and applicable to local regulatory requirements, and is included as an option. The opt out adds the customer to the DNC list. This opt-out announcement is a recorded audio file.
  2. For Dialer calls, where the customer answers and there is no agent available, there is an option to opt out of further calls. In some cases, this is required and applicable to local regulatory requirements, and is included as an option. The opt out adds the customer to the DNC list.
  3. While handling an outbound interaction, agents can add a customer to the DNC list through agent desktop.
- Workspace Web Edition is the agent desktop.
  - Genesys Pulse is used for real-time reporting.
  - Any real-time or historical reports beyond the standard reports listed in the document are considered additional work.
  - For this use case, the linking of subsequent inbound interactions to previous outbound interactions is not in scope.
  - Callbacks may be scheduled by the agent through Workspace Web Edition provided they are currently handling an outbound interaction. An agent cannot schedule a callback while handling an inbound interaction.
  - English-only user interface.
  - Please see Distribution Logic section for Outbound IVR - Connect to Agent Options and use case prerequisites.

## Customer Assumptions

- Customer provides Genesys with the contact list from their own CRM, marketing, or collections database through a flat file.
- Customer is responsible for recording and providing any required announcements and recordings.
- Compliance is handled by the customer: the customer has acquired proper express consent opt-in from consumers to make Sales & Marketing calls and send automated messages, maintains an auditable list, and honors opt out requests. The contact lists that are loaded into Genesys contain only customers to whom calls can be made according to the corresponding local compliance rules.
- The outbound solution can be configured based on the customer's understanding and direction of compliance with local outbound calling regulations to the location of delivered calls. The customer is responsible for compliance with laws and regulations with respect to outbound calling and automatic dialing. It is recommended that the customer's legal department confirm the organization is in full compliance with these regulations.
- Suppression lists should include customers who have opted out of previous campaigns as well as a country-specific Do-Not-Contact list (if applicable). When a consumer opts out of a campaign, they should be added to a suppression list. Customers can also upload another suppression list or add an individual to an existing suppression list. These suppression lists can then be applied to future campaigns at the campaign level or at the overall account level. They can be optional or mandatory for each future campaign, as configured by the administrator.

## 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



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All of the following required:	At least one of the following required:	Optional	Exceptions
<b>Inbound</b> <ul style="list-style-type: none"><li>• Genesys Call Routing (CE01)</li></ul>			

On-premises Assumptions

Cloud Assumptions

Related Documentation

Document Version

- 2.1.2