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Genesys Engage On-Premises Use Cases

Genesys SMS & Email Notifications (CE12) for Genesys Engage on premises

7/27/2024

Use SMS and email to send personalized, timely and relevant notifications to customers.

What's the challenge?

Companies want a quick way to engage with their customers to notify them of appointment reminders, delivery notifications, fraud alerts, coupons, loyalty program information, surveys and much more. Repeated handling of unnecessary outbound calls and preventable inbound follow-up drives up costs and can damage customer and employee satisfaction.

What's the solution?

Communicate important information simply and efficiently using Genesys SMS / Email Notifications. Customers experience a more satisfying and engaging experience with businesses. And companies reduce operational costs while ensuring important and time-sensitive digital alerts are delivered to customers wherever they are.

Other offerings:

Genesys Cloud

Contents

- 1 What's the challenge?
- 2 What's the solution?
- 3 Use Case Overview
  - 3.1 Story and Business Context
  - 3.2 Use Case Benefits*
  - 3.3 Summary
- 4 Use Case Definition
  - 4.1 Business Flow
  - 4.2 Business and Distribution Logic
- 5 User Interface & Reporting
  - 5.1 Agent UI
  - 5.2 Reporting

- 6 Customer-facing Considerations
  - 6.1 Interdependencies
  - 6.2 Document Version

Use Case Overview

Story and Business Context

Consumers want businesses to send them proactive notifications when that information is personalized, timely, and relevant. The text messaging channel is an efficient, quick way to notify customers of appointment reminders, delivery notifications, fraud alerts, coupons, loyalty program information, surveys and much more. Many companies struggle with adding the SMS channel to their outbound notification strategy for marketing, care, or collections. This use case describes the ability to configure and execute outbound SMS campaigns based on customer-provided contact lists.

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 Conversion Rates	Conversion rates, close rates, cross-sells and up-sell rates will improve through the ability to automatically generate outbound calls and empowering agents with single searchable desktop application that shows customer context.
Improved Customer Experience	Improve NPS by proactively notifying customers through SMS.
Improved Employee Utilization	Reduce agent-assisted outbound calls by automatically sending communications through SMS.
Reduced Volume of Interactions	Decrease inbound interactions by proactively sending communications through SMS.

Summary

This use case enables companies to proactively send customers notifications using SMS for marketing, care, or collections. 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, mobile phone number, and contact reason. Delivery results are recorded in the system to feed into reports.

Outbound SMS notification examples include:

Financial Services	Telecom	Healthcare	Utilitie
• New customer engagement • Replenish prepaid card	• Going over plan alerts • Payment reminders	• Appointment reminders • Wellness updates	• Service call conf • Planned downtir

Financial Services	Telecom	Healthcare	Utilitie
reminders • Payment reminders • Fraud alerts	• Upgrade eligibility • Customer win back	• Refill prescriptions • Claim status updates	• Outage status • Payment remind
Retail	**Insurance**	**Collection Agencies**	**Travel and Ho**
• Sales alerts • Order confirmations • Product recalls • Loyalty program activity	• Quote follow-up • Payment reminders • Claims status updates • Renewal notice	• Payment reminders • Late payment alters • Payment confirmations	• Booking confirm • Upselling servic • Payment remind • Travel updates • Loyalty program

Use Case Definition

Business Flow

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

Business and Distribution Logic

Business Logic

Contact Records

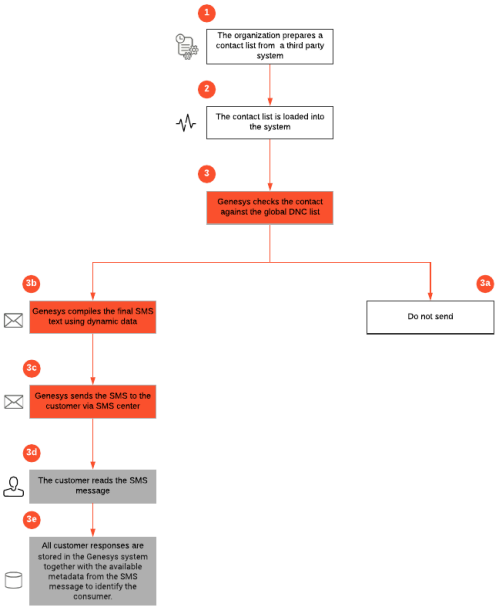
The customer is responsible for the preparation and loading of calling lists into the outbound solution via Genesys Administrator. The design, development, and usage of any custom method for uploading calling lists into the outbound solution (via API, for example) is the responsibility of the customer.

Campaign Settings

One campaign is configured within the system. Customer Admin or Genesys PS can configure campaign settings such as start/stop timing and interaction design.

Text Message Content Template

One template is used for compiling the SMS message. The wording of the SMS message can be personalized using calling list data.



Business Flow Description

1. An Admin (or Genesys PS) configures the campaign and interaction strategy in the Genesys System. The organization prepares a contact list for the campaign.
2. The campaign begins contacting consumers based on the campaign strategy set in the previous step.
3. The Genesys system checks each contact/record against the Do Not Call list to filter out consumers who should not be contacted.

   3a. All records flagged with DNC are not sent.

   3b. Genesys compiles the SMS text from a template using fields provided with the contact list for personalization. Best practice recommends adhering to character limits, though the Genesys aggregation platform supports concatenation for messages exceeding in-country limits (for example, the maximum size in the U.S. is 160 characters).

   3c. Genesys system updates contact/record result, which is recorded in the contact list.

   3d. The customer receives the message.

Distribution Logic

N/A

User Interface & Reporting

Agent UI

N/A

Reporting

Real-time Reporting

Pulse, a Genesys Administrator Extension (GAX) plug-in application, shows the campaign event, but SMS statistics do not populate.

Reporting for SMS can only be viewed through the calling list. The call_result field is populated with the value "answer", which represents the SMS being sent. There are no additional call_result values to represent an SMS being delivered or not delivered.

Historical Reporting

Similar to real-time reporting, the calling list can be exported to show the SMS records sent. There are no additional call_result values to represent an SMS being delivered or not delivered.

Reporting is very limited and it is not available in GI2 and GCXI.

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

- The default SMS gateway for sending/receiving SMS messages is the Genesys SMS Aggregation Service. Integration with a third-party SMS aggregation service is a custom implementation for which the customer is responsible.
- Chained records are not supported.
- The customer is responsible for the preparation and loading of contact lists as described in the Business Logic section.
- Pulse is used for real-time reporting.
- Genesys Infomart and Interactive Insights are used for historical reporting.
- Any real-time or historical reports beyond the standard reports listed in the document are considered additional work.
- Opt Out/Opt In is not part of the use case, but is a regulatory requirement to be handled by the customer.

Customer Responsibilities

- Customer will provide Genesys with the contact list from their own CRM, marketing, or collections database.
- Compliance is handled by the customer: the customer has a plan for securing express consent from customers (when required) before sending SMS messages, maintains an auditable list, and honors opt-out requests. The contact lists loaded into Genesys contain only customers to whom an SMS message can be sent according to local compliance rules.
- The outbound solution can be configured based on the customer's understanding and direction of compliance with local outbound calling regulations at the site of the installation. 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 that the organization is in full compliance with these regulations.
- SMS message content supports a single language only (Latin-based, no double-byte characters).
- The sender number (dedicated short code, long code, alpha sender ID, or text-enabled toll-free number) is provisioned on the Genesys system. Genesys can provision this for the customer for a fee.
- MMS is not included in the scope of this use case.
- SMS throughput is limited to 1 message per second per server when dealing with long-codes.

N/A

Document Version

- Version **v 1.2.5** last updated **July 27, 2024**