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Genesys Engage On-Premises Use Cases

Genesys Omnichannel Notifications (CE13) for Genesys Engage on premises

Use multiple channels to notify customers

What's the challenge?

Providing proactive service updates or reaching a prospect at the right time with a personalized message using a customer's preferred channel such as SMS, email, or voice can be a difficult business objective to achieve. Relying on manually sent notifications is inefficient and error-prone, and doesn't provide the tools necessary to stay within industry regulations and compliance standards.

What's the solution?

Genesys Omnichannel Notification empowers customers to personalize the information they receive — and define when, where, and how they receive it. As a result, customer satisfaction and loyalty increase because the customer stays informed, while operational costs go down as low-value inbound interactions decrease. Companies are able to develop multi-wave campaigns that use calls, voice messages, emails, and text messages.

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Use Case Overview

Story and Business Context

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. According to Forbes, 87% of consumers want to be proactively contacted by companies with relevant information. Many organizations struggle with keeping customers informed in a timely and personalized manner across multiple channels, which is frustrating for customers and costly for companies. Companies are not deflecting avoidable and low-value inbound calls, resulting in higher agent costs and lower customer and employee satisfaction. Channels are being managed in silos because companies don't have an integrated, multi-channel outbound platform. And companies often struggle to stay within industry regulations and manage for compliance risk as it relates to outbound communications. This use case enables companies to implement multi-channel outbound campaigns across voice, SMS, and email to improve the efficiency of their staff while increasing reach, contact rates, response rates, and revenue.

Current State Pain Points

- Inefficient dialing of outbound calls by agents. Inefficient dialing could be an overreliance on agents manually dialing customers or using limited predictive dialers that don't optimally pace outbound call volume or successfully screen out unproductive calls such as voice mails and no-answers.
- Inability to escalate outreach across multiple channels to increase successful contacts, lower costs, and improve the number of payments collected.
- Sales and lead development reps are manually dialing customers and prospects for sales and marketing purposes. Manually dialing customers is expensive and wastes time
- Companies are managing communication channels in silos and don't have an integrated, multi-channel platform
- All companies must follow industry regulations and manage for compliance risk
- Organizations are challenged to proactively contact customers over multiple channels with payment reminders and past-due notifications that results in fewer payments being collected.

Ideal State

- Improved effectiveness and return on investment of outbound sales and marketing campaigns (such as telemarketing; upsell/cross-sell; customer win-back; loyalty/promotions) through increased contact rates, response rates, and close-rates.
- Leads are routed to sales agents within seconds (not minutes, hours, or days). "Speed to lead" follow-up is crucial in many sales environments and it drives lead contact rates and conversion rates while decreasing call abandonment rates.
- Sales departments are using 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 increases agent productivity
- Bill pay reminders using multiple preferred outbound channels collects more payments from customers, reduces the cost-to-collect and drives high-value inbound calls into the contact center (prompt

customers to call with questions or to pay).

Happier Agents

- Automated channels are 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 close business and meet their sales quotas

Happier Legal Team

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

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 Employee Utilization	An omnichannel outbound engine improves the number of productive contacts per agent (occupancy) and reduces cost expenditure from under-utilized outbound resources.
Increased Revenue	Close rates, cross-sells and up-sell rates will improve by generating outbound contact through voice, SMS or email and empowering agents with single searchable desktop application that shows customer context across all channels
Reduced Penalties and Fines	Automatic application of business and compliance rules for outbound communications reduces the risk of penalties and fines.
Reduced Volume of Interactions	Contacting customers proactively via SMS, Email or voice message will reduce the volume of inbound interactions handled by agents

Summary

The Genesys system supports agent-assisted and automated outbound communications across channels including Dialer, Outbound IVR, SMS, and Email. Customers tell Genesys which consumers they want to contact through which channels. Companies can blend contact strategies (cloud only) and escalate outreach attempts from automated to agent-assisted calls. Dialer calls can be made in predictive, progressive, preview, or manual mode. The company contacts the customers based a provided list provided to Genesys. The list contains information on the requested channels and collections rules, that are used to decide how to contact the customer. The customer is offered the option to switch channels based on their need, specific moment, location, etc. 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, phone number or email, and contact reason. Delivery results are recorded in the system to feed into reports.

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- Maximize agent productivity / efficiency
 - Automate dialing phone numbers, screen out unproductive calls, and optimize the volume of outbound calls based on predicted agent availability
 - Contact results are captured in the CRM system / collection system to add context to future interactions
 - Simplify compliance
 - Self-service rules builder (cloud only) that enables business users to adhere with requirements
 - Compliance and business rules are taken into accounts and accurately maintained
 - Customer opt-in program (cloud only)
 - Improve the customer experience
 - Timely, relevant, and context-aware outreach over multiple channels
 - Personalized messages to individual customers with option to self-pay
 - Balance the need to collect payments from customers while protecting the ongoing customer relationship
 - Transparent conversation throughout multiple channels when negotiating with debtor, drive a better conversion

Use Case Definition

Business Flow

(1) The following shows the main flow:

Business Flow

(2) The following diagram shows the Dialer option of the flow:

Business Flow

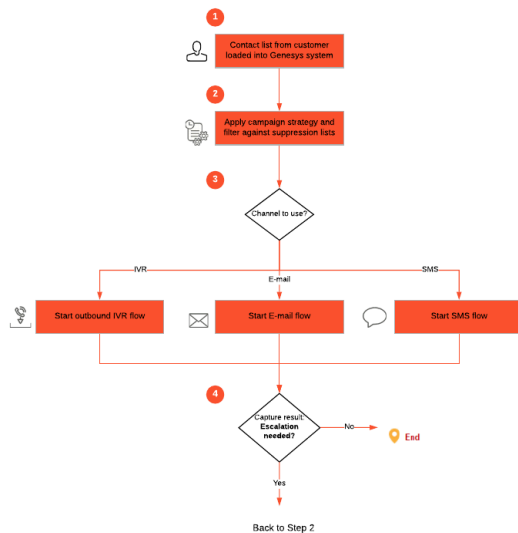
(3) The following diagram shows the Outbound IVR option of the flow:

Business Flow

(4) The following shows the SMS option of the flow:

Business Flow

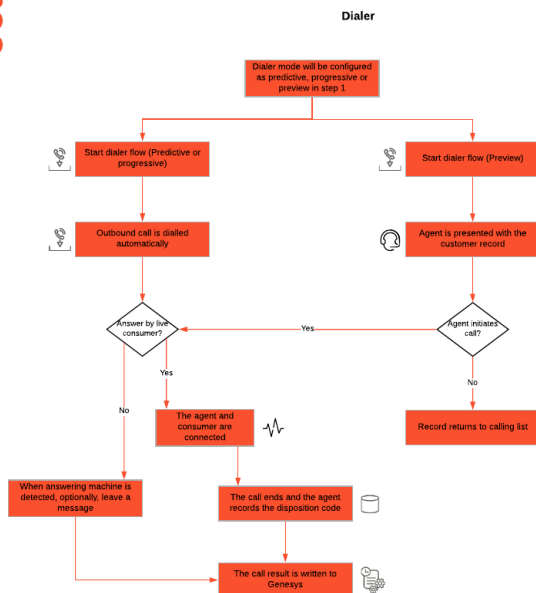
(5) The following shows the e-mail option of the flow:



Business Flow Description

1. An Admin (or Genesys PS) configures the campaign strategy and settings in the Genesys System.
2. The organization either prepares a contact list from a third-party system (such as CRM or Collections) or configures their system to utilize the Genesys REST API to insert contact records based on events, using a list or API format defined by Genesys:
 - The contacts are loaded within Genesys by the system administrator.
 - Batch uploads can be manual, via S/FTP or API.
3. The campaign begins contacting consumers based on the campaign strategy set in step 1. The Genesys system checks each contact/record against the relevant Do Not Call and suppression lists to filter out consumers who should not be contacted.
4. Based on the result of the call/message, more contact attempts may be undertaken, either:
 - in the same channel
 - in another channel

Contact attempts are configured in the campaign settings in step 1.



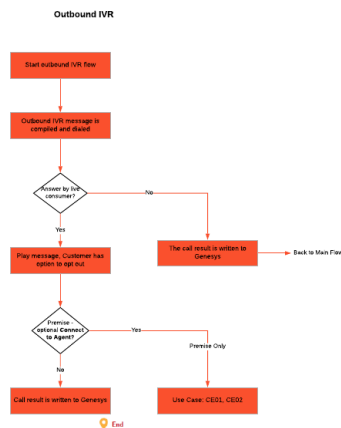
Business Flow Description For Dialer, the dialing mode is configured as Preview, Progressive, or Predictive.

- In Preview mode, the agent receives or retrieves a record and initiates the call.
- In Progressive mode, the system automatically calls based on an agent being available for the specific campaign.
- In Predictive mode, the system automatically calls 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 leaves a message. Based on the disposition code, the call may be retried later. The result is written back to the system.
 - In Progressive and Predictive modes, the call is either disconnected or plays a message (based on the configuration chosen in step 1) and the result is written back to the system.
- **Live parties connect - the agent is connected to the consumer.**
 - The consumer can opt out. The agent records the opt-out request in the agent desktop and it is written to a suppression list.
 - The consumer can ask for a callback. The agent records the callback 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.



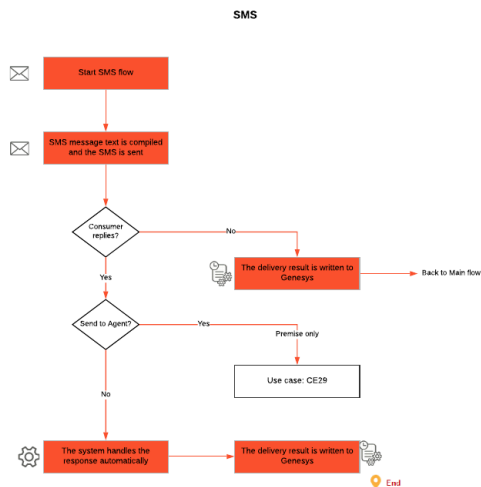
Business Flow Description For Outbound IVR, there are multiple resulting scenarios:

- Bad Number or No Answer - the call disconnects and the result is written back to the system.
- Answering Machine - the call disconnects or plays a message (based on the chosen configuration in step 1) and the result is written back to the system.
- Live parties connect - the call plays the Outbound IVR message.

The consumer can opt out of future calls. Opt-out is typically done by including “Press 9 to opt out of future calls.”

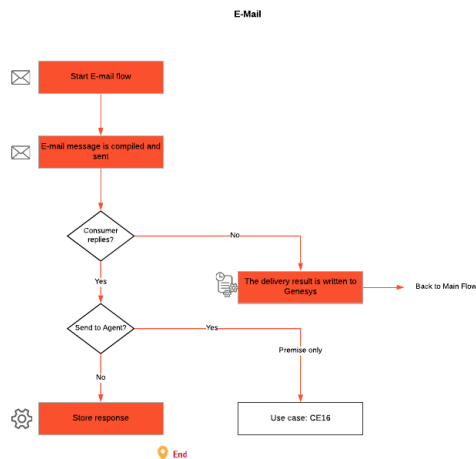
Optionally, the Customer Admin may choose to offer the option to connect to a live agent (based on the chosen configuration). Connecting to a live agent is typically done by including “Press 2 to connect to a live agent” and can be achieved by routing to a phone number provided by the company.

The result is written back to the system.



Business Flow Description For SMS, Genesys compiles the text message from a standard template for the contact list with our without personalization. Customer is responsible for following character limitations per country (Max size is 160 characters in the U.S.). Concatenation is supported for message content that is longer than a single SMS.

- Delivery result, if available, is recorded in the Genesys system
- The consumer may decide to respond to the SMS message. All replies are stored in the Genesys system together with the available metadata from the SMS message to identify the consumer.
 - For a HELP keyword, a standardized help text is sent to the consumer.
 - For a STOP keyword, a standardized text is sent to the consumer, and the mobile number is added to a suppression list. It is the organization's responsibility to process the opt-out requests and guarantee that the consumer is not included in any further contact list.
 - ADD-ON: For a pre-defined keyword, the system can either send an automated response or trigger an API push into the customer's system.
 - For an undefined keyword, the system stores the response but it does not reply. As an ADD-ON, the organization may choose to send undefined words to an agent.



Business Flow Description For Email, the consumer can take various actions after receiving the message:

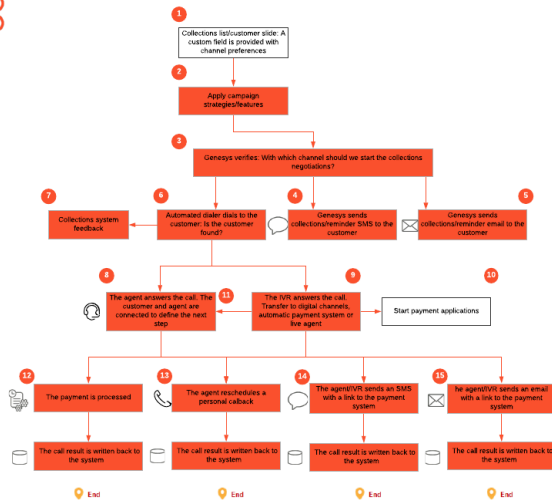
- Do nothing / delete the message.
- Click the link in the message (optional).
 - The website is hosted by the customer (websites that are hosted by Genesys are not in scope).
- To opt out, click the Unsubscribe link.
 - This action can either be configured to go into a suppression list hosted by Genesys or go to a customer-hosted website for managing subscriptions.
- Reply to the email message with a phone call.
 - Customer could include a 1-800 number to call for more information in the email. To track how many inbound calls an email campaign generates, the customer must assign a unique 1-800 number to each campaign.
- Responses to email campaign are funneled through a unique inbox.
- In all cases, the delivery result is written back to the system.

Business Flow

(6) Outbound Collections Flow:

The actors of the business flow are:

- Collections Agent
 - Customer
 - Systems
 - Touchpoints (Dialer, Outbound IVR, Email, Text/SMS)
 - CRM / Collections System
 - Payment Processor
 - Genesys Outbound
 - Standalone Cloud
 - CX Contact, OCS, and Proactive Contact (Premise)
- Admin: Collection system management configuration, Genesys campaign configuration



Business Flow Description

1. Payments / Collections Department loads a list of relevant records to Genesys. Customer (dialer, outbound IVR, email, SMS).
 - **Minimum Mandatory Fields:** Customer Number / Client ID and Devices (phone numbers, e-mail address)
 - **Advanced Fields:** User-Defined fields that may be used for personalization or splitting criteria to assign record to the correct list and channel.
2. A Customer Admin (or Genesys PS) configures the campaign strategy in the Genesys System (see Business Logic section for more detail)
 - Create Campaign: Configure template settings
 - Choose Channel Type: Dialer, Outbound IVR, SMS, and/or Email
 - Choose Dialer Mode (if applicable): Predictive, Progressive, Preview (Push or Pull)
 - Configure Campaign Settings: start/stop timing, frequency of contact per consumer, contact pass strategy by channel, mobile vs. landline filtering treatments, answering machine detection tuning, opt out options, connect to agent options, and assigned agent group
3. Genesys determines the channel on which the customer should be contacted based on selection rule criteria during import.
4. In case the channel is SMS, the system sends an SMS with a payment link to the customer or phone number to call to talk with an agent or make a payment.
5. In case the channel is e-mail, the system sends an e-mail with a payment link to the customer.
6. In case the customer should be contacted via an outbound call, Genesys initiates an outbound call to customer telephone number provided in the contact list. There

Business and Distribution Logic

Business Logic

BL1

Contact Records – Batch Uploaded or Added On-Demand

Contact records are either batch uploaded or added on-demand via API. An API integration would be configured by the Customer Admin or Genesys PS based on the goals of the customer and the source of the contact. The integration would be completed before the list is uploaded or contacts are added on-demand. There is no limit on number of contacts.

Channel Type – Dialer, Outbound IVR, SMS, or Email

The customer can choose which channels to use in their campaigns – Dialer (agent-assisted), Outbound IVR, SMS, and/or Email. The channel configuration is done by the Customer Admin or Genesys PS before the list being uploaded. The Customer identifies the message content (or message template) per channel.

Campaign Settings

The customer Admin or Genesys PS can configure various campaign settings: start/stop timing, frequency of contact per consumer, contact pass strategy by channel, mobile vs. landline filtering treatments, answering machine detection tuning, opt-out options, connect to agent options, and assigned agent group.

Dialer Mode - Predictive, Progressive, Preview

The customer can choose to run dialer campaigns using Preview, Progressive, and/or Predictive modes. The modes are configured by the Customer Admin or Genesys PS.

Answering Machine Detection

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

are three options for this scenario:

- Immediately connect to a live agent using progressive or predictive dialing modes
- Present the record to an agent using preview dialing mode
- Connect to an automated IVR application

7. If the customer could not be reached, there are multiple response types:
 - Bad #/No Answer: the call disconnects and the result is written back to the system
 - Answering Machine: the call disconnects or plays a message (based on the chosen configuration) and the result is written back to the system. Based on the call result, the outbound campaign can decide on the next step (contact the customer on the same channel again / escalate to another channel through copy_contact treatment to move record to appropriate campaign).
8. Customer is connected to a live agent who can discuss the debt and the payment options. Agent can also send an SMS or and email (Step 8).
9. Customer is greeted by an IVR which informs the customer about the outstanding payment and offers:
 1. Transfer to an agent (step 11)
 2. Make a payment using automated system (step 10 if available)
 3. To send an SMS with payment methods (step 14)
 4. To send an email with payment methods (step 15)
10. Customer makes payment using automated IVR application. The automated payment application is not within the scope of this use case. Two options exist:
 - Use custom payment application
11. IVR connects customer to a live agent who

BL2

Personalization

For Outbound IVR, SMS, and Email, the content of the message/script may contain personalized information from a third-party or customer database provided by the customer.

Text Message Content Template

One template is used for compiling the SMS and Email messages. The template can be personalized with specific customer-defined fields (such as customer name) from a third-party or customer database provided by the customer.

can discuss the debt and the payment options.

12. The agent can process the outstanding payment. The call result is stored in the system for reporting purposes.→AD2
13. The customer may want to reschedule the call. In this case, the agent initiates a personalized callback for the customer. The callback request is written back to the campaign list, so the callback can be handled at the requested time.→AD3
14. The agent / IVR may send an SMS message with a link to a payment system to the customer.
15. The agent / IVR may send an e-mail message with a link to a payment system to the customer.

BL3

Suppression Lists

Suppression lists should include customers who have opted out of previous campaigns and 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 Admin.

BL4

Standard SMS Keywords

It is possible to configure multiple keywords to detect an opt-out (STOP) or help request. Standard keywords include STOP and HELP and variations including: END, QUIT, CANCEL, UNSUBSCRIBE, OPTOUT, NO, STOPALL, STOP ALL, HLEP, and HLP and variations including the organization's language. A list of keywords that triggers STOP or HELP scenarios is defined with the organization at the beginning of the project.

Distribution Logic

DR1

Outbound IVR – Connect to Agent Option

- Option 1 - The interaction is routed to an agent.
- Option 2 - Connect to the customer's contact center that is not running on Genesys. These calls are routed to a phone number provided by the customer.

DR2

Outbound SMS – Connect to Agent Option

Incoming SMS (MO) interactions are routed to agents through an agent desktop as needed.

User Interface & Reporting

Agent UI

- Outbound Campaign calling. The agent must be able to perform the following tasks:
 - Add contacts to the **Do Not Call** list
 - 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 Admin or Genesys PS (included within the corresponding use cases).
- Collections Requirements. The agent must be able to perform the following tasks:
 - Send an **SMS/email** during an outbound collection campaign call.
 - Access the payment system during an outbound collection campaign call.
 - Reschedule a **callback** if requested by the customer.
 - Track the Outbound call result (payment done, promise to pay, SMS/email sent, etc.).
 - Access the **contact history**.

Reporting

Real-time Reporting

Key KPIs related to this use case are:

- Delivery / Reach Rates
- Response Rates
- Number of Inbound Calls

The Genesys system provides extensive analytics and monitoring of campaign statistics, for more Information reference the [online documentation](#).

Collections: In addition to the standard real-time reporting mentioned in the Outbound Dialer Use Case, the main KPI to show are:

- Contact rate
- Payment rate

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- Preferred channel used for payment
 - Agent efficiency (as measured by talk time vs. idle time)
 - Campaign effectiveness

Historical Reporting

Key KPIs related to this use case are:

- Delivery / Reach Rates by Campaign and Trends
- Response Rates by Campaign and Trends
- Customer Satisfaction / NPS Scores
- Number of Inbound Calls

Note: Omnichannel (SMS and email) Outbound Reporting is not available in GI2 and GCXI.

Collections: In addition to the standard historical reporting mentioned in the Outbound Dialer Use Case (based to Campaigns, Calling Lists and Agents) the main KPI to show are:

- Contact rate - for specific campaign or date range
- Payment rate - for specific campaign or date range
- Preferred channel used for payment
- Agent efficiency - for specific campaign or date range, overall and per agent
- Campaign effectiveness - for specific campaign or date range

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
Outbound <ul style="list-style-type: none"> • Genesys Outbound Dialer (CE11) • Genesys SMS & Email Notifications (CE12) 	None	Digital <ul style="list-style-type: none"> • Genesys Email Routing (CE16) • Genesys SMS Routing (CE29) 	None

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

Customer Responsibilities

- The customer provides Genesys with the contact list from their own CRM, marketing, or collections database - either flat file or on-demand trickle-feed.
- The customer is responsible for recording and providing any required announcements and recordings.
- We assume that 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 which 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 at the site of the installation. The customer is responsible for compliance with laws and regulations about outbound calling and automatic dialing. It is recommended that the customer's legal department validates 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) has been provisioned on the Genesys system. Genesys can provision the sender number for the customer for a fee.
- MMS is out of scope.

Related Documentation

Workspace Web Edition

Outbound campaigns, digital media channels, and contact and interaction management.

- Outbound campaign calling

-
- Contact and interaction history
 - email interactions
 - SMS interactions
-

Workspace Desktop Edition

Outbound campaigns, digital media channels, and contact and interaction management.

- Outbound campaign calling
 - Contact and interaction history
 - email interactions
 - SMS interactions
 - Blending media into a single conversation
-

Document Version

- Version **v1.0.0** last updated **July 15, 2025**