PureConnect Use Cases

Genesys Work and Lead Distribution (BO02) for PureConnect

9/16/2025

Optimizing work distribution across the enterprise to deliver all promises on time

What's the challenge?

You need a better way of distributing & managing work stored in disparate enterprise systems. You need your team to get more conversions in less time. When work or leads are not automatically distributed to the best available skilled resource, the result is a negative impact to customer promises, workloads, SLAs, churn, and sales conversions.

What's the solution?

Automate the distribution of work and leads to improve productivity and enhance the overall interaction experience. Genesys pulls work from multiple systems to create a single list, then automatically categorize, prioritizes, and routes work and captured leads to the best qualified employee anywhere in your company. Eliminate “cherry-picking” and misrouting to process work and leads faster and more efficiently for better resource planning, equitable work assignment, and conversion rates.

Other offerings:

Genesys Engage on-premises

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Use Case Overview

Story and Business Context

The work distribution system is designed to capture, prioritize, and effectively distribute tasks across multiple departments to the best-suited employee, based on employees, skills, and availability. This is achieved when the system is integrated with one or multiple task source systems (like CRM, BPM, and Workflow systems) where tasks related to customers are created and stored.

To determine the individual tasks' priority, the work distribution system is configured to ensure the timely completion of all tasks for all customers.

The work distribution system understands the real-time status, readiness, and skills of the employees that handle tasks, and uses rules to identify how the distribution should be handled in the most effective way.

Once the organization has a list of tasks that need to be handled by employees (coming from different source systems), the tasks are captured by the work distribution system and automatically distributed to employees based on their skills, capacity, and real-time presence. Prioritization rules for the tasks ensure that all tasks are distributed on time to the best fit resource. The system provides functionality for near-real-time monitoring and historical reports on operational performance and on major business KPIs.

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	Deliver all committed tasks on time to customers. Automation of lead follow-up ensures faster responses to prospects, improving their experience. Rigorously applying skills-based routing to match segmented leads with the best-skilled employee.
Improved Employee Utilization	Remove cherry picking by pushing the tasks to the right agents. Increase throughput, utilization, and efficiency in agents' work, by delivering the tasks to the agents’ universal desktops in push mode via screen pop together with interaction context and history in blending mode
Increased Revenue	Value-based prioritization speeds up response times for important leads, increasing conversion rates and revenue. Prioritizing and re-prioritizing leads based on various business values at that moment in time.
Reduced Administration Costs	Reduce manual distribution and task monitoring by supervisors via automation, including scheduling

Use Case Benefits	Explanation
	and reporting through intelligent task distribution. Add visibility into employee and group performance.
Reduced Employee Attrition	Offer fair distribution of workload across the available resources.

Summary

A customer journey initiates different process steps that may require manual intervention. The corresponding work items / tasks are created in CRM/BPM/Workflow systems, which play the role of source systems for tasks, but often distribute these tasks to separate queues.

The Genesys work distribution system captures tasks created in the source systems, then places them into the queue and prioritizes the tasks based on configuration. The Genesys work distribution system can distribute all interactions (voice / non-voice) to the best-skilled agent just in time, as they become due based upon their priorities. Through blending with other media types, this use case enables Front Office-Back Office integration.

Use Case Definition

Business Flow

(1) Part 1 - Capture and Distribution

The following flows describe the capture of tasks and their distribution to employees, followed by the task handling process the employee follows.

Business Flow

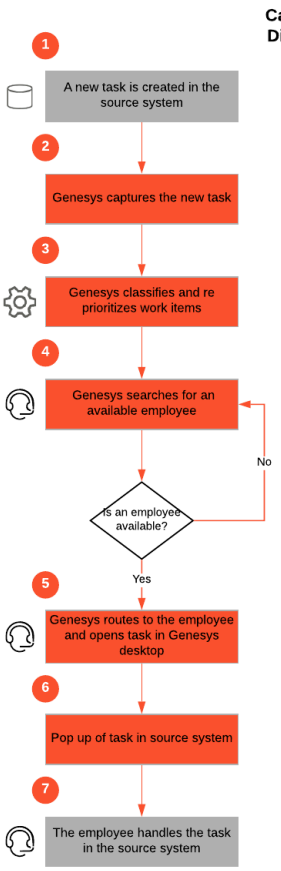
(2) Part 2 - Task Handling

Business and Distribution Logic

Business Logic

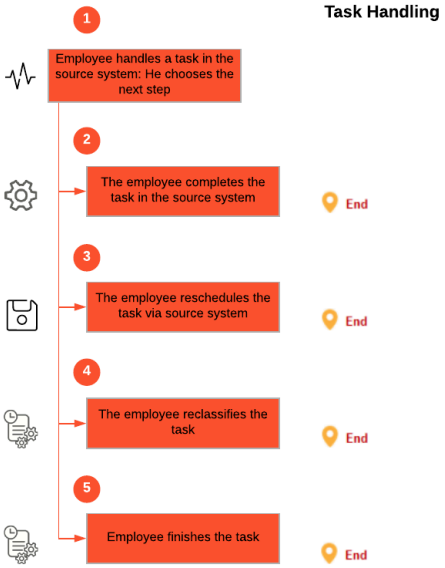
Task Classification and Prioritization

- Once a task has been created within the Genesys system, the systemassigns the priority settings for handling the task (Task Prioritization). For example, the business process defines the queues needed to handle the task. Prioritization is based on the attributes associated with tasks and on the configuration described below.



Business Flow Description Part 1 - Capture and Distribution

1. The source system (the BPM / CRM / business system storing and processing the work items associated with business processes) requires an employee to handle one of its work items. The source system uses the Genesys Generic Objects API to create a corresponding task in Genesys.
2. Genesys captures the new task and creates a new interaction in the system.
3. The interaction is prioritized according to the configuration.
4. The task is queued with all other interactions in the system. The priority of the task defines the position of the task in the queue. Once an employee with the right skill becomes available to handle the task, the task is distributed to the employee.
5. The task opens on the employee desktop.
6. The Genesys employee desktop opens the corresponding work item URL in the source system.
7. The employee handles the task in the source system.



Business Flow Description Part 2 - Task Handling

1. The employee finishes working on the task in the source system, then decides on the next step.
2. The employee may be able to complete the task so that no further action is required.
   - The employee completes the task in the source system.
   - Then the work is finished within the Genesys employee desktop (“Disconnect”).
   - The employee then selects the appropriate wrap-up code.
3. The employee may need to reschedule the task because, for example, the customer is available only on the next day. In this case, the employee reschedules the task via the source system (see Reschedule Task).
4. The employee may not be able to handle the task because it is wrongly classified. In this case, the employee reclassifies the task via the source system (see Reclassify Task).
5. The employee may coincidentally finish the task in the Genesys employee Desktop without any update in the source system (“Disconnect”). In this case, no further action is taken by Genesys.

Attributes

Task prioritization in Generic Objects is based on configuration. In order to apply the configuration within Generic Objects, a set of business attributes (parameters) needs to be passed from the source system to Generic Objects during the capture event.

The Generic Objects data model is flexible and allows the source system to submit any metadata that is relevant to the task.

Configuration

The source system configuration defines the operating principles and constraints of your organization. Example: “All tasks associated with

Department Finance and Customer Segment Gold are classified by the source system to be assigned a priority of high" or "If task attribute Department equals Credit and the Customer Segment equals Silver then the priority assigned by the source system is medium". In Generic Objects, configuration uses attributes from the captured task to submit the interaction in a particular queue and to assign it to the proper group of employees. The position of the interaction in the queue is based on the total ACD queue calculation.

Priority Rules Priority rules are applied to the task initially after being captured by setting:

- an initial value for the priority
- the initial priority remains for the duration of the interaction
    - Priority rules can be changed through a professional services engagement to meet your needs
    - In a blended environment, the priority ranges used for tasks are synchronized with the priority ranges for other media.

Task Life Cycle/Task Completion

Tasks within Genesys are completed via the source system. The logical flow is as follows:

1. The employee completes a task in the source system. After this, the employee clicks "Disconnect" in Genesys to signal that the task is complete.
2. The employee is then ready for the distribution of a new task and setting the disposition code in Genesys.

Throughout the lifecycle of the task, supervisors and managers have access to the task. This enables management to view the status and contents and to manually retrieve work items.

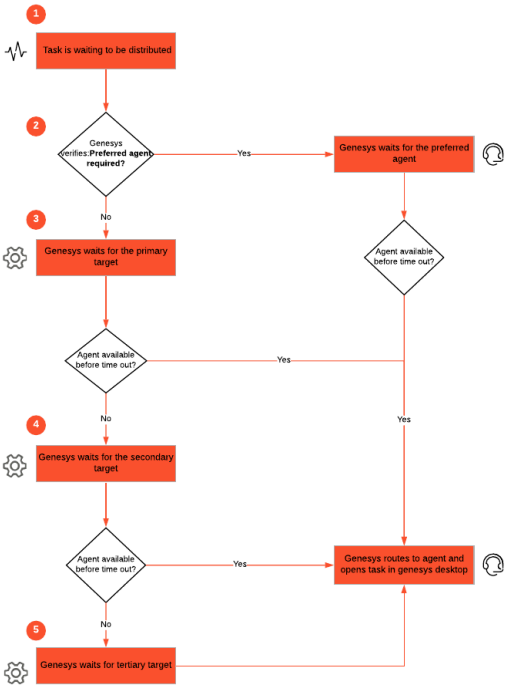
Reclassify Tasks

An employee might also need to reclassify a task. Reclassification is handled through the source system and depends on source system functionality and integration with Generic Objects. The logical flow is:

1. The employee determines that a task needs to be reclassified.
2. Either
    1. The agent reclassified the task within the source system and disconnects within Genesys.
        1. The source system completes the first task and resubmits the reclassified task.
        2. In this instance, the source system is typically used for historical reporting.
    2. The agent transfers the task to the appropriate queue in Genesys.
        1. in this instance, the Genesys reporting is typically used.

Distribution Flow

The following diagram shows the distribution flow:



Distribution Flow Description

1. A task needs to be distributed.
2. The task targets the primary agent based on the skills assigned on the task. This is typically the best-skilled employees for this task.
3. If the task cannot be distributed to the primary target within the defined period, Genesys expands distribution to the secondary target.
4. If the task cannot be distributed to the secondary target within the defined period, Genesys expands distribution to the tertiary target.
5. Genesys waits for an employee satisfying the skill and skill level requirements for the tertiary target until the task can be distributed.

Distribution Logic

Skill-based routing

This use case provides a predefined routing strategy that creates all the queues needed to assign a task to a specific employee. The routing strategy is based on distribution via skill, ensuring that a task is distributed to the best suitable employee independent of place in the organization. The required skill is defined by the Generic Objects configuration. Each employee has one or more queues associated with their profile and a skill level associated with each queue, known as proficiencies. The skill level is used to define primary, secondary, and tertiary targets within the routing logic described below. The targets are defined as follows:

- Primary target = employees with base skill level > N
- Secondary target = employees with base skill level > M
- Tertiary target = employees with base skill level > P

The values for N, M, and P are configurable based on Queue.The distribution logic supports Redirect on No Answer (RONA): if an employee does not accept a distributed task, the task is routed to another employee after a timeout. The first employee is set to not ready. This use case is combined with use cases for different media types.

In this case, blending with other media types is supported including the required configuration of capacity rules.

User Interface & Reporting

Agent UI

Task Handling-related Requirements The agent desktop provides the following functionality:

- Task processing from generic objects
- Auto vs manual answer
- Popup of the task in the source system via URL, or display of the source system ID that is used to manually open a task in the source system

General Requirements

The agent desktop has multiple not-ready statuses configured (Admin Work, Lunch, Meeting, Pause, RONA, and Training). The configuration of disposition codes to report on the business outcome (Cross Sell, Need Follow-Up, Not Right Skill, Processed, Terminated, Transferred, Up-Sell).

The customer can choose for this use case from either:

- Interaction Desktop or
- Interaction Connect

Premises and Cloud

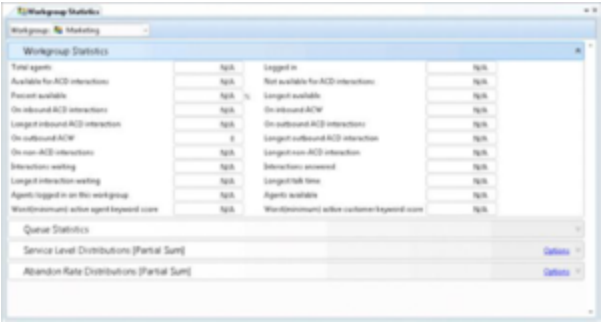
IC Business Manager is a Genesys application that offers personalized dashboards based on specific functional, geographical or organizational needs. IC Business Manager dashboards present information using graphical “widgets” that can be viewed as graphs or tables, showing information about specific key performance indicators, such as service level, generic objects handled, and the average handle time.

With IC Business Manager you can:
Monitor the current state and activity of contact center objects to help make decisions about staffing, scheduling, and generic object routing strategies.

Monitor operational activity through the Generic Objects Activity views. Monitor agent resource activity through the Generic Objects Activity views. Monitor tenant service level through the Service Level views.

Statistics Displayed on the Desktop
The required statistics to be presented on the agent desktop consist of an agent, status, and interactions statistics.
The status statistics are easily configurable by the end user.

Below is an example of Generic Object statistics that are available in Interaction Connect Business Manager for the workgroup.



Reporting

Real-time Reporting

Workgroup Queue

You can view live statistical data for a selected workgroup queue in an efficient and highly visual format. Service Level, Abandon Rate and Wait Time statistics display prominently. You can compare statistics for selected workgroup queues by displaying this view multiple times and selecting a different workgroup each time. With the appropriate license, you can select which statistics you want to view and also enable alerts for the statistics.

Agent Statistics

The Agent Statistics view summarizes the activity of a single agent in a selected workgroup. This view enables supervisors to manage agents. It shows user status, workgroup activation status, and the selected agent's specific statistics. It includes a queue view of the interactions assigned to the agent.

Historical Reporting

Queue Service Level

The Queue Service Level report provides the ability to see the summary and details of up to 12 configured service levels in an absolute or cumulative view with a percentage option.

Queue Summary and Detail

The Queue Summary and Detail report presents summarized statistical data along with detailed statistics on workgroup queues. The statistics are reported, grouped, and summarized by any combination of the queue, media type, interval, skill, or DNIS. Data for calls answered or abandons is summarized and displayed when a single service level configuration is present in the data selected but is otherwise suppressed. The report also displays a chart for interactions distributions and service level.

Wrap Up Codes

The Wrap Up Codes Report displays statistics for completed interactions, summarized by the group, including; Wrap-up code, Queue, User, or Date. The flexibility in creating this report allows the User to display the groups in any order or not include a group in the report. The report also allows the User to choose to display interaction details.

Queue Period Statistics Agent Wrap Up Code by Queue Detail Report

This report enables a supervisor to see the wrap-up codes and related detailed statistics (number of interactions, average talk time, total talk time, average ACW, total ACW, and the number of supervisor requests) for each agent in each queue. A wrap-up code of "NS" means the user did not specify a wrap-up code in the specified time period, even though wrap-up codes were enabled and offered.

Queue Period Statistics Wrap-up Code Summary Report

This report enables a supervisor to see the wrap-up codes and related summary statistics (number of interactions, average talk time, total talk time, average ACW, total ACW, and the number of supervisor requests) for each agent or each queue. A wrap-up code of "NS" means the user did not specify a wrap-up code in the specified time period, even though wrap-up codes were enabled and offered. A wrap-up code of "-" (dash) indicates a regular interaction where no wrap-up code was offered, specified, or entered.

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

There are known limitations on workforce planning for Generic Objects. For more information please contact your account team.

Customer Responsibilities

- Integration of the source system with Genesys is handled by the customer.
- Any changes within the source system that are needed for the integration with Genesys are the customer's responsibility.
- The task is managed/completed in the source application, so the agent needs to have access to the source application (BPM/CRM). To enable popup of the task in the source activation, a URL must be provided to Genesys together with the task. Otherwise the agent must pull the task manually.

Document Version

- Version **V 1.1.1** last updated **September 16, 2025**