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# PureConnect Use Cases

## Genesys Call Routing (CE01) for PureConnect

10/19/2024

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## Route voice interactions to the best skilled resource

### What's the challenge?

When your customers or sales leads call, they want to speak with someone who can fulfill their needs quickly. If they encounter excessive wait times or do not connect to the best representative in real time, they encounter unnecessary transfers, hold time, and repetition. This experience can result in customer frustration or loss of a potential sale.

### What's the solution?

Create a unified virtual contact center by connecting customers to the representative with the best fit. Genesys call routing uses skills-based routing to direct calls to the resource best equipped to help, whether in your contact center, back office, a branch office, an outsourcer, or anywhere else in the world.

### **Other offerings:**

Genesys Engage on-premises

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## Use Case Overview

### Story and Business Context

Organizations want to provide an exceptional customer and sales service experience by reducing transfers, hold time and repetition.

To achieve this experience, they need customizable software to fit complex rules, distributed using skills-based routing while automaticity capturing each call disposition for analysis.

When companies enable call routing within their Genesys environments, benefits can include:

### 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	Shorter wait times and more accurate resolutions by connecting inbound calls or leads to the best matched representative make better customer experiences and improve Net Promoter score
Improved First Contact Resolution	Captured omni-channel data is analyzed to drive process improvements to enable a superior customer journey and allows agents to be equip with the ability to handle calls on a First Contact basis.
Increased Revenue	The ability to route a sales call to the best skilled sales representative increases sales conversions.
Reduced Handle Time	Genesys' routing is far more efficient as it takes full customer context into consideration. This advantage in routing allows for more accurate and timely routing to the best agent to reduce wait time and costly mis-routes.
Reduced Transfers	Reduce the number of transfers due to better voice call routing through Genesys routing.

### Summary

Customer wants to contact the company for a specific service or for further information around a product or offer and then calls the company. The system performs hours of operation, special day, and emergency checks, and then plays corresponding messages. The customer selects an option from a menu (prompt and collect) that maps to an agent skill expression. If no agents are available, the target expands to include an additional agent skill or skill-level before routing to an optional overflow number.

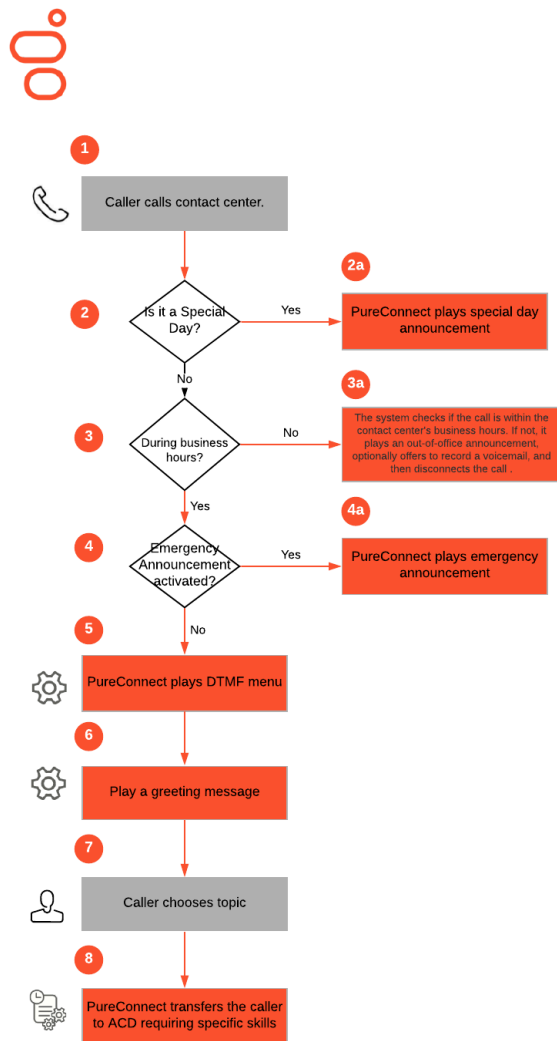
After the initial implementation, customers can enhance the service with more Genesys routing

capabilities.

## Use Case Definition

### Business Flow

The following flow describes the use case from the perspective of the main actors, that is the caller and contact center agent.



### Business Flow Description

1. The caller initiates an inbound voice call to the contact center.
2. The system checks if the day is configured as a special day. In this case a special day announcement is played and the call is disconnected.
3. The system checks if the call is within the contact center's business hours. If not, an out-of-office announcement is played, a voicemail option is provided if desired, and the call is disconnected.
4. The system checks if an emergency announcement is activated. In this case an emergency announcement is played and the call is disconnected.
5. A call steering message (DTMF menu) is played with various menu options (optional).
6. A greeting announcement is played.
7. The caller chooses a menu option using DTMF tones entered on a handset. If the caller does not choose an option or chooses a non-available option, the menu can be repeated one or more times. If the caller still does not choose a valid menu option the call will be handled with default routing parameters.
8. The ACD system distributes the call to the best fit agent for the chosen topic based on the agent's skill and skill level (see [Agent Score Calculation](#) for details).

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## Business and Distribution Logic

### Business Logic

This section describes the parameters Genesys uses to drive routing decisions and describes how these parameters are configured.

These operational parameters allow an administrator to configure a number of settings related to routing logic, including the target skills for each menu option, priority tuning, timers, and overflows.

Some parameters are only available at DNIS/Route Point level. These parameters are either needed only once at the beginning of the call flow (for example, greeting message), or they are used across the entire call flow independent of the caller's subsequent DTMF menu choices. Other parameters are available at both the DNIS/Route Point level (to be used if no call steering has been activated) and at the level of the choice of a specific touch point.

The following tables illustrate example parameters that are configurable through Genesys configuration tools.

### Parameters to configure Service Line Announcements

The following parameters are configurable by service line:

Name	Description
Business hours	Sets the hours that the business is open and accepting calls.
Special day	A list of exceptions to the regular business hours for a holiday or other reason.
Emergency declared	Activates the emergency announcement (such as a power outage or general closure).

### Parameters to define the Call Steering/DTMF Menus

This use case defines call steering options through multiple levels within the call flows. It also describes the menu options within each level. Four independent call steering flows are included: business hours, after hours, holiday, and emergency. Flows include up to two languages. Call steering for business hours flow includes a tree with 2 menu layers and up to 25 exit routing points. A caller's choice of DTMF menus and sub-options determines the service they need, and the agent skill required to best meet that need. After hours, holiday, and emergency call steering each includes a caller prompt and one exit routing point. An exit point may include items such as routing, voicemail, external transfers, or internal transfers.

### Distribution Parameters

The parameters in the following list define the behavior of the distribution logic. These parameters are configurable according to the combination of possible DTMF choices in the call steering.

Name	Description
Workgroup	Primary ACD group that will receive the interaction

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Name	Description
Skills	Secondary ACD group that will receive the interaction
Priorities	Value that defines the level of interaction importance

The skill expression that defines the target is a combination of workgroup, skill(s), and proficiencies. Best practice includes using all possible agents in the initial skill group. Agents may be configured with different proficiency levels to provide preferred assignments.

- Time in Queue: The amount of time the caller has been in queue waiting for the next available agent; this may be disabled on a workgroup basis.
- Priority: The configured priority level of the call; defaults to 50.
- Proficiency: The proficiency level configured for each agent.

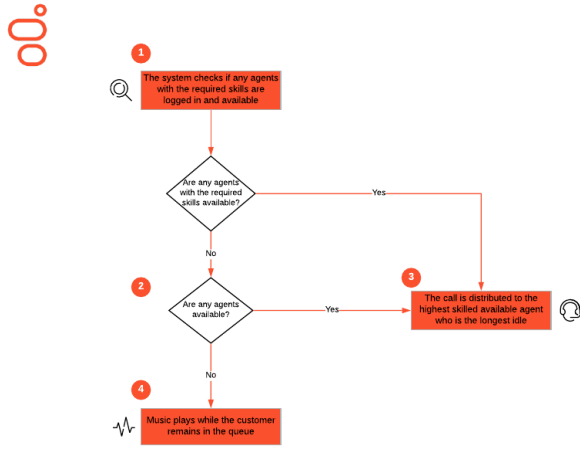
### Audio Resources

The following audio resources are configurable by service line:

Name	Example
Business Hours	A message announcing office closure and inviting to call again at opening time
Please Wait on Hold	A message inviting callers to wait
Welcome	A greeting message
Emergency	An emergency message
Special Day	A message announcing office closure due to special day (such as a public holiday)
Music waiting in queue	Music
Main DTMF Menu Message	The main Call Steering menu announcement
Sub-DTMF Menu Messages (multiple messages)	The sub-menu messages for the Call Steering menu as required

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## Distribution Flow



### Distribution Flow Description

1. The system checks whether any agents corresponding to the requested skill and skill level are logged in. If no agents with the requested skill and skill level are logged in, the flow continues with step 4.
2. The system checks whether any agents are available.
3. If agents with the required skill/skill level are available, the call is distributed to the highest skilled available agent who is idle for the longest time.
4. If no agent is available, the system plays music while the caller is in queue.



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## Distribution Logic

The distribution logic includes the following functionality:

- The workgroups, skills, and priority are configurable by (final) DTMF choice.
- Proficiencies are configurable on the agent level.
- ANA functionality: If an agent does not accept a voice interaction, the voice call is automatically put back into the distribution flow after a time-out. The agent who did not accept the call is set to agent not answering.
- Blending with other media types is possible. Priority settings for voice interactions are configurable to enable proper priority ranges between different media types. Agent utilization is configurable for agents and agent groups to define which interactions can be handled in parallel (if any).

## User Interface & Reporting

### Agent UI

- Agents can view the workgroup, DNIS, ANI, caller name, and duration when the call is presented.
- Agents can transfer calls to other individual agents and workgroups.
- Agents can transfer calls to defined route points. The routing logic defined for these route points is similar to the routing logic defined above. Only route points to transfer calls are visible to agents in their desktop.
- Agent can set their availability status to influence routing.

### Reporting

#### Real-time Reporting

- Out-of-the-box Marquee templates and IC Business Manager views are used. These include reports and widgets based on agent, agent group, and queue statistics.
  - The corresponding KPIs are available per (final) menu selection and per DNIS/Route Point (customer intent).
  - Calls deflected because of emergency condition, special day or outside of business hours are reported separately.
  - Calls transferred to an external number are reported separately.
- The availability status of each agent can be displayed.
- Alerts are configurable based on agent and workgroup statistics using upper- and lower-bound thresholds.

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## Historical Reporting

- IC Business Manager out-of-the-box reports for reporting on inbound voice calls and agents are used, including Queue Summary and User Productivity reports.
  - A report displays workgroup data broken down by the skill that was assigned on the call
    - Shows the total volume of calls that entered, were answered, or were abandoned.
    - Shows the total duration and average duration for talk, hold, and ACW.
  - The system gathers data for each agent regarding the volume of calls answered for each queue, and the duration of associated calls.

## Customer-facing Considerations

### Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

<b>All of the following required:</b>	<b>At least one of the following required:</b>	<b>Optional</b>	<b>Exceptions</b>
None	None	None	None

### General Assumptions

- Implementation of this use case is based on the corresponding Functional Requirement Specification.
- Routing parameters are configurable through Interaction Administrator, Interaction Attendant, and Interaction Connect.
- Text-to-speech and speech recognition are not included.
- All customer input is via DTMF prompt and collect.
- There are no integrations with third-party systems.
- Customers must provide all prompts and audio files in .wav (8bit, mono, mu-law, 64kbps) format. Files will not be altered, converted, or otherwise edited.
- MPLS is an optional add-on for this use case.
- All data connectivity will be over Internet (secured).

### Customer Responsibilities

N/A

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## Document Version

- Version **v 1.2.1** last updated **October 19, 2024**