PureConnect Use Cases

Genesys Personalized Routing (CE02) for PureConnect

2/24/2026

Apply personalized routing to voice interactions

What's the challenge?

When your customers call, they expect you to know who they are. If they are connected to employees who don’t have any information about them or their previous interactions — resulting in unnecessary repetition, effort and time — your customer experience scores suffer.

What's the solution?

Create an effortless experience by recognizing a repeat customer and prioritizing a connection to the same agent who previously served them. Offer expected wait times and the convenience of self-service or a call back. Genesys Personalized Routing uses context-based routing to direct calls to the best resource.

Other offerings:

Genesys Engage on-premises

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Use Case Overview

Story and Business Context

Callers expect a company to know who they are. Customer experience scores suffer when callers are connected to agents who don’t have any information about them or their previous interactions — resulting in unnecessary repetition, effort and time.

This use case connects callers with the best-fit agent based on choices within the IVR, the type of request, and customer context. Routing parameters are configurable and flexible enough to achieve a variety of desired business outcomes.

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:

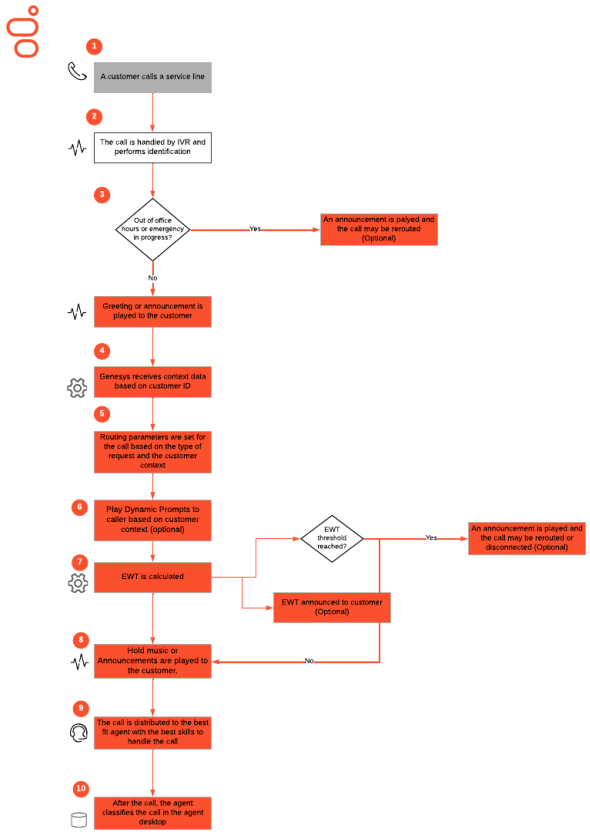
Use Case Benefits	Explanation
Improved Customer Experience	Offer better customer experience through routing to the most qualified agents based on the customer's context or through the ability to use virtualized agent pools to maximize agent resources across the entire enterprise.
Improved Employee Utilization	Improve routing to the best available agent through automated routing with context.
Increased Revenue	Route the right voice interactions to the most qualified skilled agent with better context.
Reduced Handle Time	Use enhanced context to reduce handle time.
Reduced Transfers	Improve routing of voice calls through personalized context routing.

Summary

A call is qualified within the IVR. The customer is identified and authenticated, if needed, within the IVR menu (not part of this use case). Based on the caller's choices within the IVR, the caller is routed to the best agent able to serve the request, which can potentially lead to additional services (for example, to realize up-sell potential). The logic of this use case is business rules driven and therefore flexible to changing needs and business environments.

Use Case Definition

Business Flow



Business Flow Description

1. Caller is transitioned from CE01.
2. The caller is routed to an IVR application that attempts to determine the caller's identity and service request. If explicit identification and verification are needed, CE07 provides this functionality.
3. If the call is outside of office hours or if an emergency situation is in progress, an announcement is played. The caller may then be reconnected or diverted to another number inside or outside of Genesys. If the call is within office hours, a greeting announcement is played.
4. Genesys retrieves context data about the caller based on identification.
5. If the contact center is open, the routing parameters for this call are set based on the type of request and the customer context. This enables flexible and personalized call handling.
6. Prompts may be played based upon customer context (optional)
7. The expected wait time (EWT) is calculated and announced to the caller (optional). If the EWT reaches a specific threshold, an announcement is played and the caller is disconnected or routed to another number inside or outside of Genesys (optional).
8. Hold music or additional announcements are played to the customer
9. The call is distributed to the best agent who:
    - Has the base skill(s) to handle the original request.
    - Has the supplementary skill(s) determined by the context (optional).
    - *Examples: Skills to up-sell a defined product, provide service to the customer, or specific empathy skills based on the customer segment or demographic*

10. After the conversation with the caller, the agent records the outcome of the call for reporting purposes, if they have acted on the presented lead.

Business and Distribution Logic

Business Logic

Emergency Check

Emergency mode activation is enabled at the IVR entry point for the call. Genesys runs a parallel stream to continually check if agents are logged in on the platform. If no agents are detected, then an emergency mode is automatically activated.

EWT Announcements

Announcement of expected wait time to customers is handled based on predefined recordings. It is a good practice to announce expected wait times in approximate language, to not mislead caller expectations.

Busy Treatment

Messages and music are played for calls in the queue. Any number of queue messages or hold music is configurable.

Skills

Genesys routing uses skills for enhanced routing logic and personalization. Skills are defined by caller-specific context data. For example:

- A caller calls the service hotline for “Account Transactions.”
- The caller successfully identifies and authenticates in the IVR. The corresponding data is passed to Genesys.
- In this case, the call should ideally be routed to an agent with the skills “Account_Handling” and the supplementary skill “Up-Sell” to ensure that the agent can handle both the original request and successfully convert the up-sell opportunity for the caller.

Skill level

Each agent has one or more skills associated to their profile, referred to in this use case as proficiencies.

Priority Model

Different priorities are set for calls according to business value of the type of request. If priorities are set and an agent becomes available, Genesys distributes the call with the highest priority matching the agent's skills. This is specifically relevant if the agent can receive interactions for different types of request. The priority of a call is increased over time to make sure that low-priority calls are still distributed to an agent after a potentially longer waiting time (priority tuning). Priority tuning is

configured by defining the beginning priority value for the interaction.

These values are configurable at the point where the caller enters the workgroup queue.

Transfer

The agents can transfer calls to defined internal agent groups or business lines. The routing logic defined for these route points is similar to the routing logic defined above (without initial announcements). Only transfer route points are visible in the PureConnect Client.

Additional functionality

- RONA (Redirect On No Answer)-functionality: If an agent does not accept the call, the call is automatically put back into the distribution flow after a time-out. The agent is set to not ready.
- This use case can be combined with other non-voice use cases. Blending is possible. The configuration of priority values need to be synchronized with priority settings for other media types to allow an ordering of interactions within the universal queue, according to business requirements. Capacity rules are configurable for agents and agent groups to define which interactions are handled in parallel (if any).

Context Service Data

The Genesys IVR can use database dips, REST, or SOAP requests to third-party systems to gather additional information about the caller while the caller traverses the IVR. This data is usable for more advanced IVR routing and decision-making. This capability would be incremental and is not included as part of standard Professional Services delivery.

Parameters available per type of request / service

The following is a list of business parameters that are configurable by service. These are configured in Genesys Interaction Administrator and Interaction Attendant. Note that the list is not exhaustive as additional parameters for technical settings might be required. The list does not reflect the technical realization and naming conventions to be used. Also, some of the parameters are combined for ease of readability. The list is intended for business readers to give an overview of the flexibility in the configuration of the routing logic.

Name	Description
After Hours Message	Message played if the call is outside of business hours
Emergency Flag	Flag to set emergency status for the service
Emergency Message	Message played in emergency situations
Enable Profile	Flag to indicate if this Profile is enabled. If not enabled, the Default Profile is used instead
EWT Flag	Flag to determine if EWT is announced to a customer
Open Hours	Sets the open hours of the service
Schedule	Defines the dates/times when certain IVR logic should be followed *Example: Holiday scheduled*

Special Day Message	Message played if the call is on a special day

Parameters available per customer context and type of request/service

The following is a list of business parameters that are configurable by service and customer context. Default values for these parameters are configured by Genesys Interaction Administrator or Interaction Attendant. These base parameters are overwritten by parameters defined by rules using additional customer context. The list is not exhaustive as additional parameters for technical settings might be required. It also does not reflect the technical realization and naming conventions to be used. The list is intended to give business users an overview of the flexibility in the configuration of the routing logic:

Name	Description
Skill	Skill(s) required for this call
Workgroup	Primary ACD group that will receive the interaction

Reporting Parameters

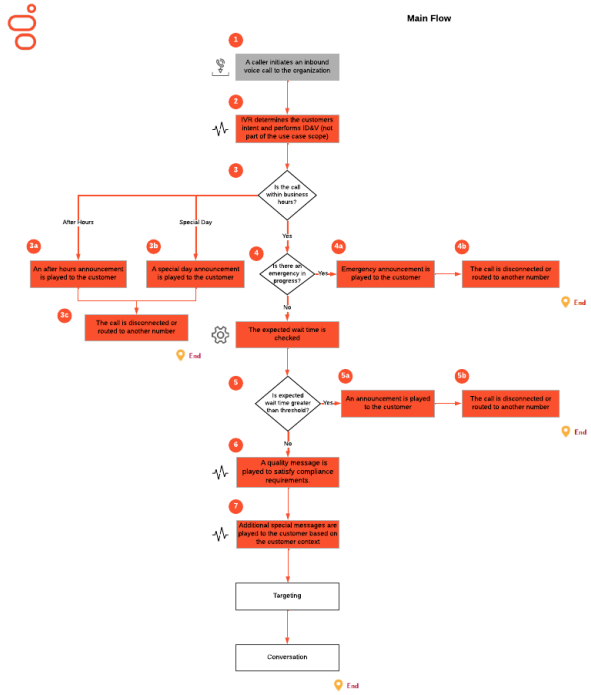
The following business parameters represent reporting categories and they are completely customizable to a company's business model. An administrator can assign different combinations of these parameters to each of the inbound and distribution parameter groups. The assignments can distinguish them in reporting and enable identification of the unique properties of the parameter group.

Name	Description
Profile	Where caller enters IVR
Schedule	Route in Profile taken to determine system schedules
Nodes	Each configured decision point throughout the IVR

Parameters to define the Call Steering

This use case defines call steering options through the use of conditional evaluations based on customer context. At each evaluation, a followup action is carried out to personalize the IVR experience for the caller. These actions may include playing prompts, setting dynamic workgroups or skills, or taking different menu paths based on who the caller is (requires CEO1). The base use case includes up to 8 evaluations, each one including a follow-up action. The use case supports up to two languages.Additional evaluations may be included within this use case through expanded scope or Project Change Request.

Distribution Flow



Distribution Flow Description Main Distribution Flow

1. The caller calls one of the contact center numbers.
2. The IVR determines the type of request (or service) and the customer ID (out of scope for this use case).
3. Genesys performs a check if the call is within the business hours for the requested service. The call may be:
   - Within business hours
   - After hours
   - On special days (e.g. public holidays)
   - In the last two cases, a corresponding announcement is played. The caller is either disconnected or deflected to a different number inside or outside of Genesys for further processing.
4. Genesys checks if an emergency condition is activated for the call. In this case, a corresponding announcement is played and the call is either disconnected or deflected to a different number inside or outside of Genesys for further processing.
5. The expected wait time is calculated. If the expected wait time is beyond a configured threshold, a corresponding announcement is played and the call is either disconnected or deflected to a different number inside or outside of Genesys for further processing.
6. A quality message is played to satisfy compliance requirements.
7. Special messages, which depend on the type of request and the context, are played.

Conversation Flow

1. The agent handles the caller's request.
2. The caller may not have identified and verified up front, but the request may require identification and potentially verification. In this case, the agent can

handle this manually via a third-party system (outside the scope of this use case).

3. Once the caller is identified and verified, the agent can update the customer ID and verification status in Genesys. The customer context is retrieved from Genesys and displayed to the agent.
4. After the conversation, the agent can set the call outcome including the information about whether they acted on a specific lead (if part of the caller's context data). This information is used for reporting purposes.

Distribution Logic

Call Qualification and Customer Identification (outside of the scope of this use case)

As a prerequisite for this CE02 use case, call qualification and customer identification are handled by an IVR application before the start of this use case. This IVR application is outside the scope of this use case. Use case CE07, Effective Identification & Validation in IVR, can be used for this functionality.The CE02 use case assumes that Genesys receives the following information from the IVR:

- Type of Request / Service (either via DTMF, natural language recognition or IVR intelligence)
- Caller language
- Caller identification
- Information on the status of the identification:
  - Anonymous
  - Identification provided
  - Identification and verification (ID&V) provided
  - Customer ID -The customer ID might be any ID as used by the organization that identifies the caller.Alternatively, the CLI is usable for caller identification, but is less reliable.
  - This input determines the parameters for the specific call.

Remark on naming convention in this document:

“Type of request/service” is the mapping of a call to the caller's need using an IVR pre-qualification, such as a DTMF menu. Therefore, it may be more granular than a published service number for the contact center, or a department within the contact center (for example, sales or billing). The latter is sometimes also referred to as service within some organizations. However, in this use case, “service” is used interchangeably with “type of request” and refers to the more granular definition.

User Interface & Reporting

Agent UI

- The agent 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.
- The agents can transfer calls to defined route points. The routing logic defined for these route points will be similar to the routing logic defined above. Only route points to transfer calls will be visible to the agent in their desktop.
- The agent can set their availability status to influence routing.

Reporting

Real-time Reporting

- Out-of-the-box Marquee templates as well as Interaction Center Business Manager views will be used, which include reports and widgets based on Agent, Agent Group and Queue statistics.
    - The corresponding KPIs will be 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 will be reported separately.
    - Calls transferred to an external number will be reported separately
- The availability status of each agent can be displayed
- Alerts can be configured based on agent and workgroup statistics using upper and lower bound thresholds

Historical Reporting

- IC Business Manager out-of-the-box reports for reporting on inbound voice calls and agents will be used, including Queue Summary and User Productivity reports.
    - Display workgroup data broken down by the skill that was assigned on the call
        - Show the total volume of calls that entered, were answered, or were abandoned.
        - Show the total durations and average durations for talk, hold, and ACW.
    - Gather data for each agent regarding the volume of calls answered for each queue, and durations associated with them.

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
Inbound • Genesys Call Routing (CE01)	None	None	None

General Assumptions

N/A

Customer Responsibilities

- The IVR application to determine the type of request and customer ID is not part of this use case and has to be provided separately.
- All announcements are to be provided by the customer.
- Routing parameters are configured through Interaction Administrator and Interaction Attendant.
- IC Business Manager is used for historical reporting.
- Interaction Desktop or Interaction Connect is used as the agent desktop.
- IC Business Manager is used for real-time reporting.

Document Version

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