PureConnect Use Cases

Genesys Outbound Dialer (CE11) for PureConnect

12/4/2025

Improve customer communications and increase sales conversion using powerful dialer capabilities

What's the challenge?

Dialing for sales outreach is a hard job that requires specialized skills. Low agent utilization due to sub-par dialers, manual dialing, lack of appropriate blending of inbound/outbound result in fewer sales conversions.

What's the solution?

Deliver coordinated outreach and create optimal engagements based on agent availability while reducing costs. Improve the ROI of outbound sales campaigns by efficiently acquiring, up-selling, and winning back customers through automated and assisted calling campaigns by using a powerful dialer for voice calls and IVR for voice messaging.

Other offerings:

Genesys Cloud Genesys Engage on-premises

Contents

Use Case Overview

Story and Business Context

A company needs to make outbound calls to initiate contact with its customers based on specific business rules for sales, marketing, care, or collections. This use case describes the ability to configure and execute outbound dialing campaigns – both automated and agent-assisted – based on customer-provided contact list(s).

Generating new business and up-selling 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.

Happier Agents

- Predictive dialing is used when appropriate to improve agent efficiency and satisfaction by removing low value calls and wasted time

- Productive and highly utilized agents will have more opportunities to serve customers, close business, and meet their sales quotas

Happier Legal Team

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

Improved Effectiveness / Higher Return on Investment

- Improved return on investment of outbound sales and marketing campaigns (e.g. telemarketing; upsell/ cross-sell; customer win-back; loyalty/promotions) and outbound campaigns.

- Leads are routed to sales agents within seconds (not minutes, hours, or days) since "speed to lead" follow-up is crucial in many sales environments. This 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. Outbound call volume is efficiently paced, which results in more sales conversations and increases agent productivity.

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, 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

Use Case Benefits	Explanation
	shows customer context.
Improved Employee Utilization	Automating dialing eliminates time spent on dialing and on unanswered calls to improve employee utilization. Enabling blending of inbound and outbound calls also improves employee utilization.
Increased Contact Rate	Automated handling of voicemail and unanswered calls improves right party contacts.
Reduced Customer Churn	Improved customer experience, and in consequence, a reduction in customer churn allows organizations to save on the costs associated with acquiring new customers plus avoids the loss of future revenue.
Reduced Volume of Interactions	Reduced volume of interactions by proactively sending communications through outbound channels.

Summary

The Genesys system supports both agent-assisted and automated outbound calling campaigns using dialer and outbound IVR channels. Companies can blend contact strategies and escalate outreach attempts from automated to agent-assisted calls. Dialer calls can be made in predictive, progressive, preview, or manual mode. 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, contact phone number, and contact reason. Delivery results are recorded in the system to feed into reports.

Sales and lead development reps are manually dialing customers and prospects for sales and marketing purposes, which is expensive and wastes time. Companies are managing communication in silos and don't have an integrated, outbound dialing campaign. All companies must follow industry regulations and manage for compliance risk.
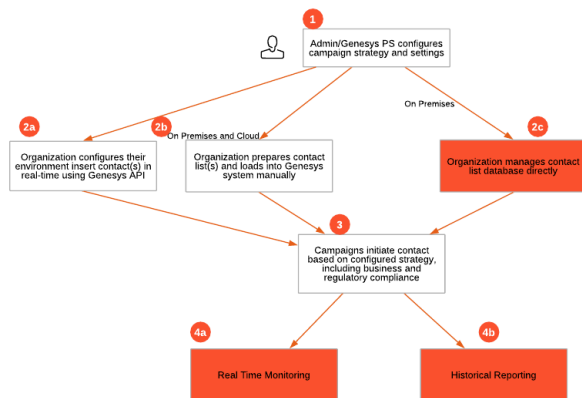
Use Case Definition

Business Flow

(1)

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

Business Flow

(2)

The following diagram shows the Agentless calling mode flow:
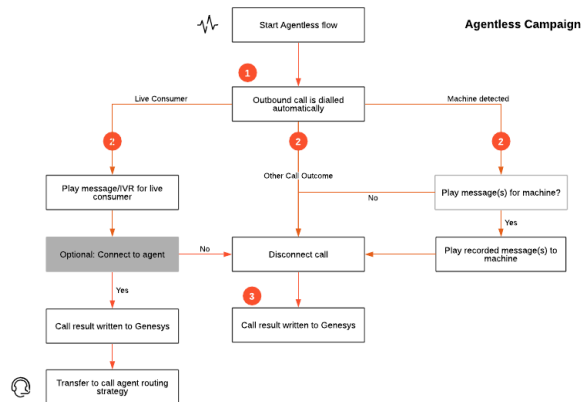
Business Flow Description

1. An admin or Genesys Professional Services 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 use a Genesys PureConnect API to insert contact records. The organization defines the schema for each list.

3. The campaign begins contacting consumers based on the campaign strategy set in step 1. The Genesys system checks each contact/record against the configured Do Not Call list to filter out consumers who should not be contacted. Each call result is recorded. See *Cloud or On Premises* and *On Premises Only* options below.

4. The organization uses the real-time monitoring tools or historical reports to evaluate campaign success.

Cloud or On Premises Options from item# 3

- Manual upload of file with Contact List Import Wizard

- Use API to insert records in real-time or batches

On Premises Only

- Organization manages the contact list database directly, inserting records using SQL (Oracle of MSSQL)
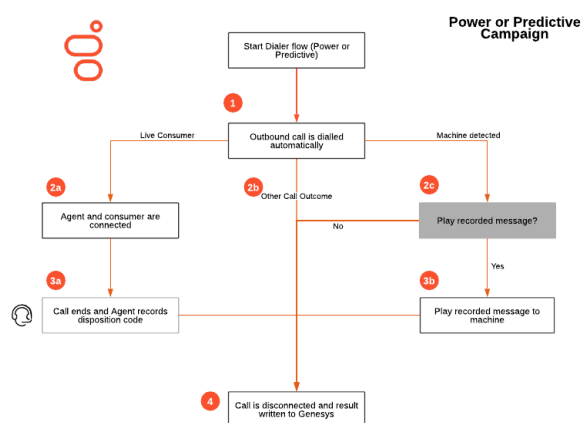
Business Flow Description For Agentless campaigns, there are multiple resulting scenarios:

1. An outbound call is dialed automatically.

2. Call Analysis Detection determines which path to take:

   - Live Party - the call either disconnects, plays a recorded message, or uses IVR tools to create a call flow to produce a tailored message, which may include:

     - Text-to-speech playback of contact data from list

     - Decision trees based on contact data to personalize the message

     - The option to opt out of future calls. This is typically done by including "Press 9 to opt out of future calls"

     - The option to connect to a live agent

     - Speech analysis to interpret consumer words instead of using touch-tone buttons, as available

     - Any other IVR-related feature, such as transferring to self-service

   - Answering Machine - the call either disconnects, plays a recorded message, or uses IVR tools to create a call flow to produce a tailored message, which may include:

     - Text-to-speech playback of contact data from list

     - Decision trees based on contact data to personalize the message

   - Other call results, such as No Answer or Bad Number, disconnects the call

3. In each case, the call is disconnected and the result is written back to the system.

Business Flow

(3)

The following diagram shows the Power and Predictive calling mode flow:

Power or Predictive Campaign

Business Flow Description

1. In Power mode, the system automatically places some number of calls based on the pacing algorithm and when the agent becomes available for the specific campaign. In Predictive mode, the system automatically places some number of calls based on the pacing algorithm and expected agent availability for the specific campaign.

2. For each call attempt, the following are the Outbound Scenarios:

   - Live Party connect - the agent is connected to the contact.

   - Other Call Outbound, that is, Bad Number or No Answer: the call disconnects and the result is written back to the system.

   - Answering Machine: the call either disconnects or plays a message (based on the chosen configuration in step 1)

3. At the end of the call, the agent selects a result code, or the system automatically assigns a result code if not handled by an agent. The following are some of the optional agent dispositions that may be configurable:

   - The contact has the option to ask for a callback. The agent selects a date and time for the campaign to place another call to that contact.

   - The contact may choose to opt out of future calls. That contact is added to a Do Not Call list for future scrubbing for this campaign.

4. The call is disconnected. The result is written back to the system.

Business Flow

(4)

The following diagram shows the Preview calling mode flow:
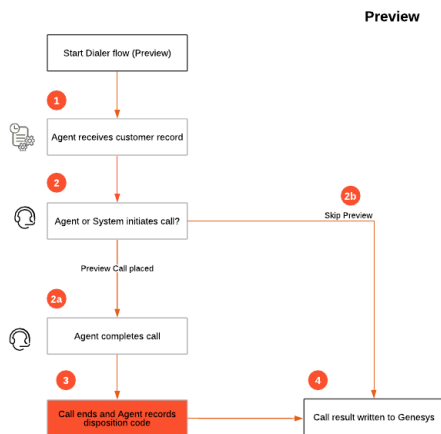
Preview

Business Flow Description

1. In Preview mode, the agent receives a record prior to the call being placed.

2. Based on configuration, either that agent initiates the call or the campaign places the call after a configurable number of seconds. There is also a separate, configurable Skip result if the agent does not place the call.

3. The agent determines the result from a provided list, whether No Answer, Bad Number, Answering Machine, or any number of live party potential outcomes.

4. The selected result is written back to the system.

Business and Distribution Logic

Business Logic

Contact Records

Contact records are either manually uploaded (Cloud and On Premises), added on-demand via API (Cloud and On Premises), or by managing a the Dialer contact database directly (On Premises only). This would be configured by the organization admin or Genesys Professional Services, based on the goals of the customer and the source of the contact. There is no limit on the number of contacts.

Campaign Settings

The organization admin or Genesys Professional Services can configure various campaign settings: start/stop timing, frequency of contact per consumer, filtering treatments, answering machine detection, opt out options, connect to agent options, agent desktop display (scripting), sorting of contacts, and assigned agent group.

Calling Mode - Predictive, Power, Preview

The organization can choose to run Dialer campaigns using Agentless, Preview, Power, and/ or Predictive modes. This mode is configured by the organization admin or Genesys Professional Services.

Scripting Settings

The organization configures scripts for agents using provided script building tools. Scripts have dispositions, text that contains verbiage for agents to read to live party or instructions, and data from the contact list displayed with labels, or embedded within the text area ("Hello *John Customer*, this is *Sally Agent* calling about *Our Product*").

Answering Machine Detection

The organization can choose whether to disconnect or to play a message when an answering machine is detected. Machine detection may be completely disabled, in which case machines are treated as live party connects.

Personalization

For Agentless campaigns, the content and flow of the message may use personalized information from the contact list database to determine which messages to play, and perhaps text-to-speech playback. The audio files are provided by the organization.

User Interface & Reporting

Agent UI

- The agent must be able to view data about the contact provided in the list of contacts assigned to a campaign.

- The agent must be able to read instructions or verbiage displayed on their screen specific to the campaign call.

- The agent must be able to enter a wrap code for each call. The code is used to define the next step in the recall strategy and is captured for historical and real-time reporting.

- Each of the above items must be configurable by an Administrator.

Reporting

Real-time Reporting

Interaction Center Business Manager

For PureConnect, Interaction Center Business Manager contains the real-time reporting features for outbound capabilities. The views are documented in PureConnect help.

The outbound views show statistics regarding campaign performance, agent performance, campaign status and activity, and outbound system health.

Historical Reporting

Outbound historical performance reports are documented in the PureConnect help.

The reports are accessible via the Interaction Reporter view of IC Business Manager. The reports provide information about campaign and agent performance over a provided time 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
None	**Inbound** • Genesys Call Routing (CE01) • Genesys Personalized Routing (CE02)	None	None

General Assumptions

- A customization is required to correlate an inbound interaction resulting from an outbound campaign. This includes updating the contact's status or adding them to a Do Not Call (DNC) list.

- Customer provides an MSSQL or Oracle database for use by Interaction Dialer.

- Automating the import of contacts to the database will be defined as provided by Genesys PS, via customer-developed usage of contact list API, or customer direct updates to the provided database.

Customer Responsibilities

NA

Document Version

- Version **ver 1.0.3** last updated **December 4, 2025**