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PureConnect Use Cases

Genesys Chat Routing (CE18) for PureConnect

10/1/2023

Route chat interactions to the best skilled resource

What's the challenge?

When customers can't find the answers they need on your website, they want to speak with someone who answer their questions in real time. Online consumers prefer web chat over other channels of communication. Failure to offer a live chat option results in lost sales and lower customer experience scores.

What's the solution?

With just a single click, Genesys Chat Routing provides your digital customers immediate access to live help. And because Genesys Chat uses skills-based routing, chat requests can be intelligently routed to the individual best equipped to help.

Other offerings:

Genesys Cloud Genesys Engage on-premises

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Use Case Overview

Story and Business Context

The web chat channel has become an invaluable tool in communicating with and engaging with customers to provide better service for answering questions, completing orders, general guidance on company's product and features, and personalized customer support. With this solution, Genesys can improve handle time, first contact resolution, agent utilization, and customer satisfaction.

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	Make better use of employee skills by routing chats to the right resource through skills-based routing
Improved First Contact Resolution	Improved First Contact Resolution by routing interactions to an expert through skills based routing
Increased Revenue	Routing revenue-generating opportunities to best resources through skills based routing increases revenue
Reduced Handle Time	Routing chats to the right skilled agents through skills based routing reduces handle time

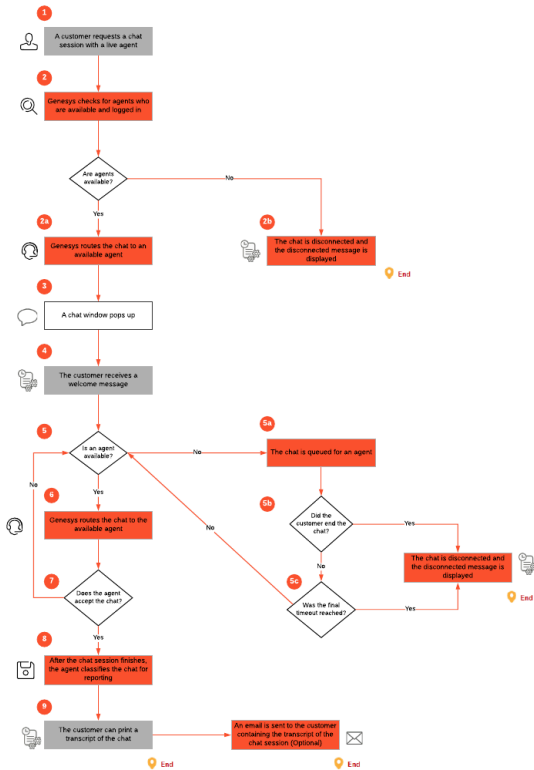
Summary

A website visitor can request a chat session with an agent from the company's website on a specific topic. The request is routed to the best available agent depending on the subject and the agent skill. The agent will be provided with the visitor's context (requested subject).

Use Case Definition

Business Flow

The following flow describes the use case from the perspective of the main actors, i.e., the customer and the contact center agent. The following diagrams shows the business flow of the use case:



Business Flow Description

1. The website visitor requests to chat with a live agent via the webpage.
2. Genesys checks if agents are available, logged in, and (through the use of Genesys APIs) is able check the wait time to make intelligent decisions as to when to offer the chat feature to website visitors.
 - If no agents are logged in, the chat is disconnected and the website visitor receives a disconnect message.
 - If agents are logged in, routing takes place.
3. The chat pop-up window opens.
4. The website visitor gets a welcome message from the Genesys system. Welcome text varies, depending on the workgroup.
5. The Genesys system searches for an available chat agent.
 - If no agent is available, the chat interaction is queued (see section “Distribution Logic,” for the queuing logic) until an agent becomes available. Wait time and the option to leave a chat voicemail can be configured to send to the website visitor during wait time.
 - If the website visitor ends the chat session, the business flow ends.
 - If the final timeout is reached, the chat is ended and the website visitor is informed. The business flow ends.
6. When the chat request is routed to an agent, the agent can either accept or ignore the chat interaction. If the agent does not accept the chat interaction, Genesys attempts to route the interaction to another agent after a specified timeout. The first agent is set to not ready (Did Not Answer).
7. If the agent accepts the chat interaction, the chat session between the agent and the website visitor is established. The agent sees the full chat session and context within the desktop. The agent can use standard responses based on the workgroup for the chat interaction.

Business and Distribution Logic

Business Logic

Business logic and rules determine the distribution of chat requests and the standard responses agents can use. Distribution depends on a combination of agent skill and availability.

Distribution Logic

The following table shows the parameters that can be configured based on the subject:

Parameter	Description
Skill	Required agent skill for distribution of the chat message <ul style="list-style-type: none">Required minimal skill level for the first target group of Min Skill level 1 agentsRequired maximum skill level for the first target group of Max Skill level 1 agents
Idle time warning (for customer)	Idle time warning that the interaction will be disconnected after the website visitor has not communicated for a specified period of time.
Idle time disconnect Message (final time out)	This message is displayed to the website visitor when the idle time limit has been reached.
Disconnect Message (no agents)	This message is displayed to the website visitor when no agents are logged in for this service.
Welcome message	This message is displayed to the website visitor when the chat session is started.
Wait Time	This message is displayed when a website visitor first connects.
Position in Queue	This message is displayed when a website visitor first connects.
Option to Leave a Chat Voicemail	This message is displayed when a website visitor first connects.
Chat Transcript	Available as an option to print from the chat window.

- When the chat session is finished, the agent can set a disposition code to register the outcome of the chat for reporting purposes.
- The website visitor has the ability to print a transcript of the chat session. Additionally, with the optional Interaction Recorder license, visitors can receive an email with a transcript of the chat session.

Standard Responses

In the response library window, the workspace displays suggested responses to the agent based on keyword searches. Standard responses are generated by the customer for specific scenarios or steps of the chat flow.

Operational Hours

Operational hours should be configured on the customer's webpage. The chat initiation functionality should not be displayed to website visitors outside of business hours.

Additional Functionality

The following list includes additional functionality for the distribution logic:

- The distribution logic looks for agents with the requested skill and a skill level within the boundaries of minimum and maximum required skill levels.
- The skill, minimum and maximum skill levels, and timers will be configurable by subject (see section "Business Logic").
- Re-route on no answer functionality: If an agent does not accept the chat interaction, the chat interaction is automatically put back into the distribution flow after a timeout. The agent is set to Agent Not Answering.
- Blending with other media types is possible. Priority settings for chat interactions is configurable to enable proper priority ranges between different media types. Utilization rules are configured for the agents or agent groups to define which interactions can be handled in parallel (if any).

User Interface & Reporting

Agent UI

The following list includes the minimum requirements for the chat interface:

- Configuration of not-ready reason codes (Agent Not Answering, Away From Desk, Meeting, etc.)
- Configuration of disposition codes to report on business outcome (Cross Sell, Need Follow-Up, Not Right Skill, Processed, Terminated, Transferred, Up Sell)
- Access to a standard response library where customers can build their own specific response messages for specific steps of the chat flow
- Agent to agent transfer

Reporting

Real-time Reporting

Premises and Cloud

IC Business Manager is a Genesys application that offers personalized dashboards based on specific functional, geographical or organizational needs. Pulse 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, chat interaction 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 chat routing strategies.
- Create widgets from scratch or user-defined templates for a fast and easy text or graphical presentation of selected or user-defined object statistics.
- Monitor operational chat activity through the Chat Queue Activity views.
- Monitor agent resource activity through the Chat Agent Activity views.
- Monitor tenant service level through the Chat Service Level views.

Historical Reporting

Premises and Cloud

IC Business Manager out-of-the-box reports are used to:

- Assess the day-to-day operations of the contact center resources for the routing and handling of interactions
- Measure the effectiveness of the routing rules and efficiency of the use case
- Calculate the conversion success rate, with Disposition/Wrap-Up codes
- Evaluate resource performance with a variety of reports for Agents and Interaction Details

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 for the relevant media type.

Queue Summary and Detail -The Queue Summary and Detail report displays summarized statistical data along with detailed statistics on Workgroup Queues. The statistics are reported, grouped, and summarized by any combination of Queue, MediaType, 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.

Agent Utilization Report - The Agent Utilization report displays time usage information by agent across all campaigns, including: talk, ACW, non-Dialer, idle, break, preview.

For more information, see [About Interaction Reporter](#).

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

- Historical reporting requires IC Business Manager.
- Interaction Desktop or Interaction Connect is used as agent desktop.
- There is no integration with third-party systems.
- If customers require advanced chat window customization, they must deploy Web Chat Server on a premises system. Basic customizations are available in the Genesys hosted chat solution.

Customer Responsibilities

- The Genesys customer handles the integration of the solution into the website.
- Customers are responsible for creating their own automated responses within Interaction Administrator.
- Checking for Agents Logged In/Availability on every subsite of a website is not recommended as excessive requests can strain the CIC server. It is recommended to cache this information and check on intervals, or to only check on the leaf/end page of a tree.

Document Version

- Version **v 1.0.2** last updated **October 1, 2023**