



Genesys Engage on-premises Use Cases

Genesys Work Distribution (BO02) for Genesys Engage on premises

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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 from many sources to make staff more productive and enhance the employee and customer experience. Genesys Work Distribution pulls work from multiple systems and creates a single work list that automatically organizes, prioritizes, and routes work and captured leads (with context) to the best qualified rep anywhere in your company. Eliminate “cherry-picking” and misrouting, so reps can process work and leads faster and more efficiently, for better resource planning, equitable work assignment and conversion rates.

Story and Business Context

Customer journey touchpoints often represent different business processes. Some business processes still need manual intervention even through increased automation efforts. Work items and sales leads created in CRM, BPM, marketing, email, or workflow source systems have corresponding journey touchpoints. Workbins across different business units, geographical regions, systems, or resource groups cause inefficient distribution of work items and leads get stuck in disjointed.

It is challenging to distribute high volumes of work items and sales leads fairly, quickly, and in accordance to the underlying customer commitment or SLA.

While many have invested in automation of tasks or leads, these systems and applications focus on the process and not the employees who actually complete the processes.

Genesys Intelligent Workload Distribution (iWD) allows for the effective management of all enterprise work items and leads. Capturing work created in multiple source systems, placing them into a universal queue, and constantly reprioritizing them based on business needs delivers efficient distribution. Genesys distributes work items and leads at the right time to the best-skilled and available employee to complete the task or close the lead.

The ability to define and edit business logic easily drives the proper prioritization and distribution of leads between the available resources. It also prevents “cherry-picking” of work and balancing out the interactions between the available resources fairly and equally. Work items and sales leads can be segmented and prioritized based on multiple business parameters such as lead capture date, expected value, customer segment, and so on. For example, a consumer shopping online that has abandoned their shopping cart is an interaction captured by the

website and delivered to Genesys iWD as a "hot lead." The lead takes its place in the universal queue with a priority schema defined by the size of the shopping cart, the value of the product or service, or other data points about the customer. The lead reprioritizes constantly and then distributed based on business rules that define the service level.

Companies improve their throughput and lead conversion rates, while managing operational costs, enhancing customer experience, and keeping employees satisfied by using Genesys iWD.

Use Case Benefits

Use Case Benefits	Explanation
Improved Employee Attrition Rate	Offer fair distribution of workload across the available resources. Visibility into how leads are processed by employees.
Improved Employee Occupancy	Remove cherry-picking by pushing work items to the right employees. Prioritizing and presenting leads to sales reps reduces idle time, increases throughput, and improves their utilization.
Improved Employee Satisfaction	Automatic prioritization and distribution of leads prevents "cherry picking" and ensures fairer distribution of leads among team members. Dynamically matching the demand of leads with the supply of skilled resources throughout the day.
Improved Net Promoter Score	Deliver all committed work items 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.
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	Intelligently automate work item distribution, reduce manual distribution and monitoring of tasks by supervisors, improve scheduling and reporting. Add visibility into employee and group performance. Automatic lead distribution reduces time spent by supervisors and administration staff in monitoring, distributing, and reporting on leads. Providing visibility through real-time and historical metrics. Providing necessary data for workforce management and optimization.
Reduced Handle Time	Increase throughput, utilization, and efficiency in agents' work by delivering work items to the agents' universal desktops in push mode by screen pop together with interaction context and history in blending mode. Easy access to lead context speeds up familiarization and handle time for sales reps.

Summary

The design of Genesys Intelligent Workload Distribution (iWD) enables effective capture, classification, prioritization, management, and distribution of work items and high value leads. This distribution occurs across multiple departments to the best-suited employees, based on business segmentation, resource skills, and availability.

The powerful iWD Manager enables business users to define and adjust business segmentation rules and prioritization schemas, and view near real-time dashboards into operational performance and backlog. Genesys Designer gives administrators control over the routing logic once the task or lead needs to be delivered to the Genesys agent desktop.

Genesys captures new work items or leads from multiple source systems and creates an interaction in the system. The interaction goes through a process of classification, segmentation, and prioritization within the universal queue based on the business rules created.

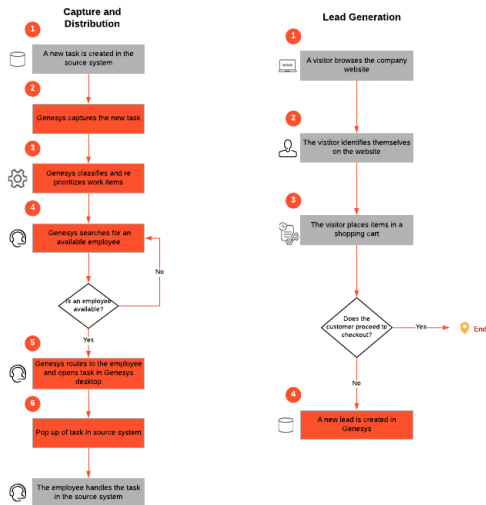
Once an employee with the right skill profile becomes available, the Genesys core routing engine is used to distribute it to the employee in the Genesys agent desktop at the right time to convert the lead or execute on the task. If it cannot be assigned to an employee within a specified period, it continues to be reprioritized.

Use Case Definition

Business Flow

(1) Part 1 - Capture and Distribution / Lead Generation

The diagrams in the following chapters show the business flow of this use case.



Business Flow Description

1. The system creates a new item in the system with all attached data necessary to process. For leads, see the "Attributes" topic. The source system requires an employee to handle a work item. The source system is the BPM, CRM, or business system that stores and processes the work items associated with said business process. Genesys intelligent Workload Distribution creates the corresponding work item via the Genesys Cloud RESTful Capture Adapter.
2. Genesys captures the new work item and handles the creation of a new interaction in the system.
3. The interaction is classified and prioritized according to specific lead rules and the business value of the lead (or) the nature of the work item. The lead and work items reprioritize continually if they fail distribution to an employee.
4. The lead/work item is queued with all other interactions in the Genesys system. The priority of these items defines the position in the global queue. Once an employee with the right skill profile becomes available to handle the work item, the item distributes to that employee. If the system cannot assign it within a specified period, it remains reprioritized.
5. The respective employee (could be lead development representative or an Agent) will be able to open the task in the Workspace Desktop to manage and/or complete the task.
6. The lead development representative could use the contact provided by the customer to contact the lead. For work items, the agent could open them with their respective CRMs to further handle the task.

Business Flow

(2) Part 2 - Work Item Handling



Business Flow Description

- The employee handles the lead/work item (either an outbound call for leads or through source system for work items). After finishing their work, they decide on the next step.
 - After the outbound call the lead representative could record the result for reporting purposes (converted, not converted) (or) the source system updates Genesys that the work item is completed and Genesys can archive the work item
 - Alternatively, the employee couple complete the task within the Workspace desktop (using the "mark done" button).
- The employee may choose not to finish their work immediately if, for example, they are waiting for a call back from the customer or a colleague. In this work item, the employee can park the work in their personal workbin.
- The employee may need to reschedule the work item if, for example, the customer is only available on the next day. They reschedule the work item via the source system.
- The employee may not be able to handle the work item because it is wrongly classified. They reclassify the work item via the source system. (not applicable for leads)
- The employee might not take any action in the source system(not applicable for leads):
 - The employee may accidentally finish the work item in the employee desktop without any update in the source system ("mark done"). ? To prevent this the mark done button can be disabled in Genesys desktop.
 - Genesys does not receive an update of the work item via the Cloud REST Capture Adapter. In this scenario the source system needs to check for these tasks and update/restart the tasks in Genesys.

Related Documentation

[Link to video](#)

For more details

For additional details, contact your Genesys Sales Representative by filling out the form or for immediate assistance call us: 1-888-Genesys.