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Genesys Cloud CX Use Cases

Genesys Personalized Routing with Callback (CE43) for Genesys Cloud

5/4/2024

Important

This use case consolidates capabilities under [[UseCases/Current/GenesysCloud/CE01|]], [[UseCases/Current/GenesysCloud/CE03|]] and introduces routing personalization.

Route voice interactions to the best skilled resource with personalization and callback option

What's the challenge?

When customers call you, they want to speak with someone familiar with your company, someone who can quickly address their needs. If they encounter long wait times or connect to agents who lack the proper information, then calls can transfer more often, hold times increase, and the customer experiences unnecessary repetition. Any of these factors can result in a poor customer experience.

What's the solution?

Proactively address the needs of your customers when they call into your contact center, which helps drive a greater customer experience. Recognize repeat customers and route calls either to the last agent they spoke with, or to the best-skilled agents that can more effectively help address their needs. If no agents are available to address their needs appropriately, let them know their expected wait time, and offer a callback option.

[Link to video](#)

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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 frustration from repeated customer interaction with your company. Advanced routing capabilities improve efficiency and reduce hold times by sending interactions to the right agent using skills-based routing, preferred agent routing, and in-queue callbacks. The easy-to-deploy routing application contains flexible business logic and configuration options required to direct calls to the best-fit agent based on the type of request and customer context. 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 | Improve the customer experience by proactively addressing the needs of the caller. Find the agents most familiar with the customers needs, or someone who has worked with the customer in the past. |
| Improved Employee Utilization | Ensure that more informed agents can handle customer inquiries more quickly. This enables them to handle more calls effectively and efficiently. |
| Increased Revenue | Ensure that the best and most skilled agents handle calls matched to their strength. This increases the opportunity to close a sale or upsell other products, which can lead to increased revenue. |
| Reduced Handle Time | Reduce costs and deliver exceptional customer experience by routing customers to the most appropriately skilled agents who can handle their queries more efficiently. |
| Reduced Interaction Abandonment | Provide clear wait times and callback options to decrease abandonment. |
| Reduced Transfers | Reduce the number of transfers with context-based routing which finds the best agents first. |
| Reduced Volume of Interactions | Decrease in inbound calls from individual callers repeatedly trying to make contact. |

Summary

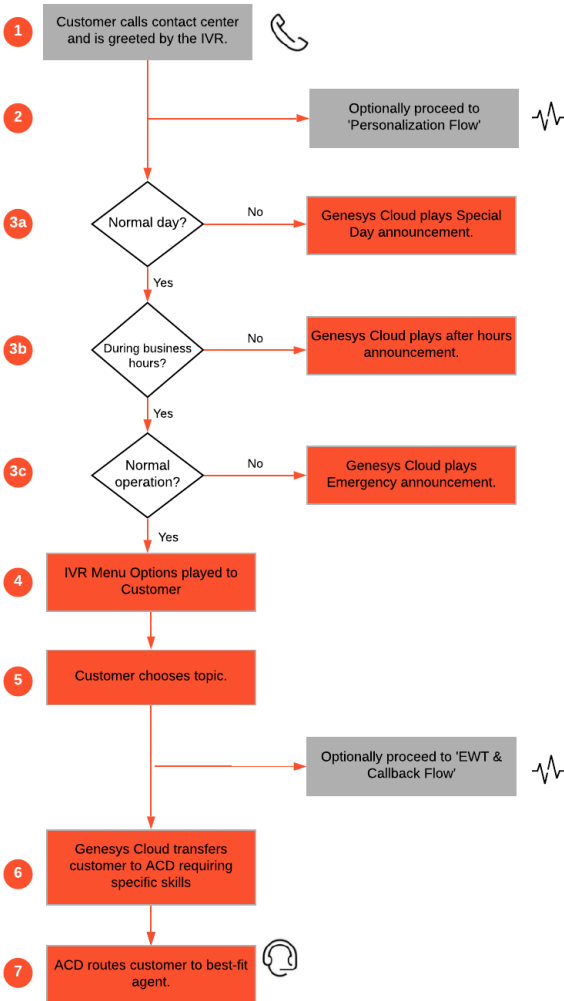
Creating a great experience for the customers and prospects that call into your contact center is paramount to creating long-lasting business relationships. The experience starts at the IVR,

presenting callers with simple options to identify or self-serve to reduce their time on the phone. Caller data retrieved from the IVR allows the system to make the best routing decision. Use the ACD routing tools to look up the caller's phone number or account number and personalize the messaging customers hear. Preferred agent routing directs callers to a single, or set, of scored agents selected ahead of other available agents. Pairing the best agent, or the agent who last spoke to the customer, with the customer reduces handle times and drive a positive customer experience.

In case, there are not enough agents to respond to callers in a timely manner, Genesys Cloud CX automatically expands the pool of available agents to answer the call more quickly and present relevant content about the caller to an agent. Genesys Cloud CX can offer a callback option for customers to save their place in line until an agent becomes available and can call them back. Please also see the Callbacks overview.

Use Case Definition

Business Flow



Business Flow Description

| | |
|---|--|
| 1 | The customer calls one of the contact center numbers. |
| 2 | If a personalized flow is configured, the customer optionally routes to it. |
| 3 | Depending on the date and time, the caller routed according to predefined announcements and schedules. These announcements are based on the customer context. For example, quality announcements or special promotions and offers for the customer, announcements for potential self-service options. Then direct the caller to: <ul style="list-style-type: none"> a. Holiday announcements and routing. b. After hours announcements and routing. c. Emergency announcements and routing. |
| 4 | The open hours messages play and the caller routes to an IVR menu. |
| 5 | The caller selects a topic or option from the IVR menu. If agents are available, they can then route |

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| | to a callback flow or Expected Wait Time (EWT) flow. |
| 6 | <p>The call is distributed to the best agent who:</p> <ul style="list-style-type: none"> • Has the base skills to handle the original request • Has the supplementary skills determined by the customer context (optional). • If the call cannot be distributed within specific timeouts, A cascading mechanism enlarges the potential agent pool by suppressing the supplementary skill and / or reducing the skill level on the base skill. |
| 7 | After the conversation with the customer, the agent records the disposition of the call for reporting purposes. |

Business and Distribution Logic

Business Logic

Using Architect, the Genesys Cloud CX flow builder, users can configure comprehensive call flows that are designed to route callers through the appropriate menus to connect them to the best agents available. Operational parameters allow you to configure routing logic such as target queues, skills assignments, interaction priority, and so on. Some parameters are only available at the DNIS or route point level. The use of operational parameters occurs either once at the beginning of the call (greeting message), or across the whole call flow independent of subsequent DTMF menu choices of the customer. Other parameters are available at both the DNIS or route point level (if no call routing has been activated) and at the level of the choice of a specific touch point.

Parameters to Configure Service Level Announcements

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

Emergency Check

- Emergency mode activation is enabled at the beginning of the call. If an emergency flag is set for an incoming call, the corresponding emergency announcement plays, and the configured action applies to the call (disconnect or transfer to another number within or external to Genesys).

Estimated Wait Time (EWT) Announcements

- Announcement of EWT to customers is handled based on predefined recordings. It is good practice to announce expected wait times to not jeopardize customer expectation.

Busy Treatment

- Messages and music play for queuing calls and can be looped until the call is answered or abandoned.

Skill Model

- Basic skills: Skills can be used to route a specific type of request or service. Genesys routing utilizes skills for enhanced routing logic and personalization, and to route callers to the most appropriate agent with the matching skill set.
- Language skills: Language skills can be used to determine the language in which a call is answered. The requested language is provided via the IVR, and if no language is provided, a default is used.

Interaction Priority

- Priority may be set on interactions as they enter and leave the IVR flow. 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 process 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 still route to an agent after a potential longer waiting time.

Transfers

- Agents can transfer calls to other agents directly, to other queues, or even to external contacts. Genesys Cloud CX supports standard blind and consult transfer functionality to help agents direct callers to the right location.

Parameters to Define Call Routing / DTMF Menus

Customers can configure up to four levels of DTMF menus, with a maximum of nine sub-options for

each level. 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.

These DTMF levels and sub-options provide the greatest flexibility to adapt the use case to specific company requirements. However, to avoid a poor customer experience, we recommend that customers use the minimum number of levels and menu choices.

Reporting Parameters

Customers use different combinations of reporting parameters to analyze the unique properties of each parameter group in reports. Reporting parameters include:

- Queue - The target agent queue to which the interaction was routed. Customers can optionally filter queue performance data based on skill requirements.
- Agent - The agent or agents who handled the interaction.
- Wrap-up code - The wrap-up, or disposition, code that the agent or agents apply to the interaction.

Audio Resources

The following audio resources are configurable by service line:

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

Distribution Flow

(1) Personalization Flow

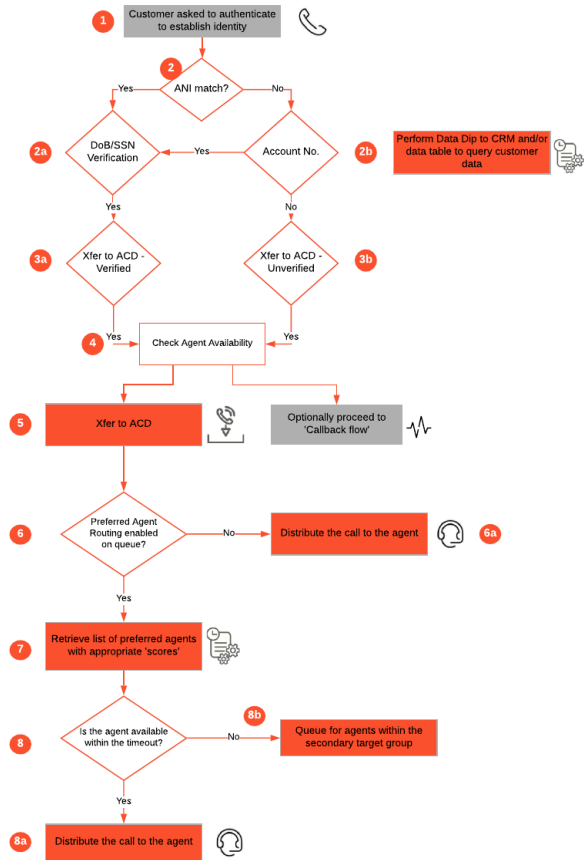
Distribution Flow

(2) Expected Wait Time Check

Distribution Logic

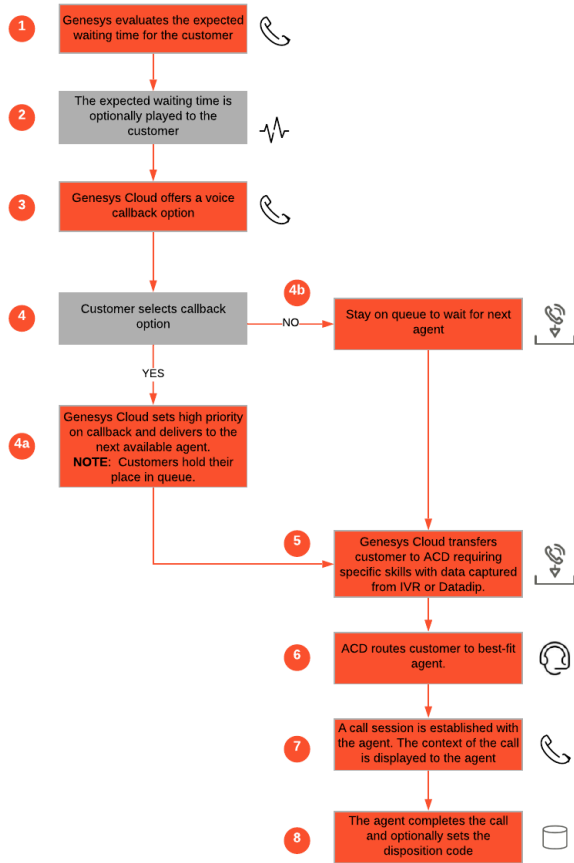
The ACD evaluation method and routing method determine distribution logic. Configuration options include:

- **All Skills Matching** - ACD considers only agents who have all the requested skills and routes the call to



Distribution Flow Description

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|----|---|
| 1 | The customer calls one of the numbers of the contact center, and is prompted to verify their identity. |
| 2 | The caller's telephone number (ANI) is identified |
| 2a | If a match is found for the ANI, the caller is prompted to enter their date of birth (DoB) or Social Security Number (SSN) for identify verification. |
| 2b | If an ANI match is not found, the system could perform a data dip or CRM integration to look up the caller's account. |
| 3a | Once the caller has been verified, they are transferred to the Verified ACD queue. |
| 3b | If the caller cannot be authenticated automatically, they are transferred to an Unverified queue where an agent would manually verify their identity. |
| 4 | Once the caller is placed into queue (either verified or unverified), the system checks to see if there are any appropriate agents available. |
| 5 | If appropriate agents are available, the caller would be connected. If no agents are available, the caller could be offered a callback option to retain their |



first available agent with the requested skills.

the

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| | place in queue. |
| 6 | If preferred agent routing is enabled, the system attempts to connect the caller to their preferred agent first. If not, the caller would be connected to the next available agent. |
| 6a | If preferred agent routing is not enabled, the caller will be routed to the next available agent. |
| 7 | The system retrieves the scores for available agents. |
| 8 | The system waits for the predefined timeout |
| 8a | If an agent is found within the timeout, the caller is connected to the appropriate agent |
| 8b | If an agent is not found within the timeout, the caller is queued to a secondary group of agents. |

Distribution Flow Description

| | |
|---|--|
| 1 | Genesys calculates the Expected Waiting Time (EWT) for the call. |
| 2 | The Expected Wait Time is announced to the customer based on predefined intervals and pre-recorded announcements. (optional) |
| 3 | Genesys Cloud CX offers a callback option to the caller. |
| 4 | The caller can choose |

- **Best Available Skills** - ACD routes interactions based on the highest average proficiency level for the requested skills. Genesys Cloud CX evaluates the first 100 agents to find the agent with the highest average proficiency rating. Genesys Cloud CX then calculates the average using the agent's proficiency rating for each of the requested skills.
- **Disregard Skills, Next Agent** - ACD routes interactions based on agent availability instead of skills. Genesys Cloud CX routes the call to the first available agent and ignores any skill requests.

General Distribution Functionality

- The queues, skills, and priority are configurable by (final) DTMF choice. Other targets are optional.
- Proficiencies are configurable at the agent level.
- Agent Not Responding: If an agent does not accept the voice interaction, the voice call remains in-queue and the agent is set to: "Agent not responding."
- Voice interactions can be prioritized over other media types.

Routing Methods

- Standard ACD - Genesys Cloud CX routes interactions to the next available agent. Genesys Cloud CX considers skills as specified by the evaluation method.
- Advanced Routing Options:
 - **Bullseye Routing:** Genesys Cloud CX routes interactions to a targeted subqueue of agents with specific skills. If no agents are available, Genesys Cloud CX relaxes the requested skills, based on the queue configuration, to expand the pool of agents who can receive the call.
 - **Preferred Agent Routing:** Similar to Bullseye routing, Genesys Cloud CX routes interactions to a predefined (from the call flow) set of scored agents which allows customers to connect callers with agents they have worked with in the past or from a pre-existing relationship defined in the CRM. Rather than relax skills, Preferred Agent Routing enables customers to relax score rings' thus expanding the pool of ranked agents who can receive the call. After times expire, Bullseye Routing can be implemented, or calls can route to any available agent in the queue.
 - See Advanced Routing Options for more details.

| | |
|----|--|
| | to wait in queue, or keep their place in queue by leaving a callback. |
| 4a | Genesys Cloud CX sets a high priority to the caller and delivers the callback to the next available agent. |
| 4b | If the caller declines the callback, they remain in queue until the next available agent is available. |
| 5 | The caller is placed into queue with the appropriate skills captured from the IVR and data dip. |
| 6 | ACD routes the caller to the best fit skilled agent. |
| 7 | The caller is connected to the agent once they become available. The agent has access to the callers information entered in the IVR or via data dip. |
| 8 | The agent completes the call and selects a disposition code that can be used for reporting purposes. |

User Interface & Reporting

Agent UI

Context Data

When a call gets distributed to an agent, the following data displays:

- An alert message to accept or decline the call
- The calling customer's phone number
- The duration of time that the call has been alerting
- The state of the call
- The queue name to which the call was targeted (as agents can work in multiple queues)
- Optionally, you could present scripts to agents to greet and interact with callers appropriately

Call Outcome / Wrap-up Code

After the call between the customer and agent has finished, an agent can apply a wrap-up code to capture the outcome of the call. Wrap-up codes could be used to capture a successful sale, identify a new lead, or even to collect a payment.

Reporting

Real-time Reporting

- Use various views, such as the *Queue Performance View*, to track improvements to key KPIs like Average Handle Time or Service Level.
- When using Preferred Agent Routing, route customers to agents they've worked with in the past. Use the *Interactions Detail View* to confirm which agents were targeted and who finally answered.
- Reduce abandoned calls by creating Custom Dashboards that show the number of calls in queue and set up a visual to show when wait times exceed defined thresholds.
- Improve agent productivity by using the *Agent Performance View* to confirm that agents are available and not spending too much time in after-call-work.

For more information about the existing views which are offered by the Genesys Cloud CX Platform, see [Reports, Views and Dashboards](#) in the Genesys Cloud CX Resource Center.

Historical Reporting

Genesys Cloud CX moved away from creating hard-coded historical reports in favor of the more dynamic performance views that can be created, saved, and exported on demand. For more information about these views, see [Reports, Views and Dashboards](#) in the Genesys Cloud CX Resource Center.

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 | Self-Service and Automation <ul style="list-style-type: none">Genesys Customer Authentication (CE07) | None |

General Assumptions

For basic call routing and personalization, any Genesys Cloud CX license suffices. For callback, the GC2 level or above applies.

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. Alternatively, SIP Qualification and Parking with a script controlled by routing are used if full GVP application is not required. This functionality is also not included within the use case.
- All announcements are provided by the customer.
- Set up a process to upload and update customer data within Genesys Context Services.

Related Documentation

About Callbacks

Learn more about callbacks and review frequently asked questions.

[About callbacks](#)

Document Version

- Version **V 1.0.2** last updated **May 5, 2024**