GENESYS™

2024 Contact center buyer's guide

Technology that supports customer and employee experiences of the future — and the trends driving their adoption

The future of CX starts here

During the last few years, businesses have recognized they need to prepare for the unexpected. That need can come at any time, in any shape and last for who knows how long. Those unforeseen changes are now a constant.

Fortunately, making incremental improvements with capabilities like automation, employee empowerment and digital channels have provided quick wins and more. But the long game in innovation goes beyond automation. As technology advances, these capabilities eventually move from differentiators to commodities. What will those differentiators be in five or 10 years? And do you have the foundation to respond quickly and effectively?

You don't need to take two steps back or start from the beginning of your innovation journey. Start right where you are. Start here.

This guide defines specific capabilities to create the most value for customers, employees and your business. They'll give you the foundation and agility to orchestrate experiences for long-term relevancy and resiliency.

Based on interviews with subject matter experts across the industry, as well as findings from our recent research, including "CX Horizons" and "The State of Customer Experience," we've identified five major trends that are accelerating customer and employee experience transformation now and will likely continue in the years ahead.

1. Data at every customer touchpoint is an opportunity to shape a better journey.
2. Use artificial intelligence (AI) to get more insight and understanding of customers.
3. Blend AI technologies to become more agile.
4. Build the contact center as a strategic hub of data insights.
5. Personalize employee experiences with intelligent tools.

The guidance in this ebook will help you successfully navigate these trends.

Focus on experiences and drive success in every interaction

Delivering connected, personalized experiences has become increasingly difficult and complex, and it's growing harder as AI extends its power to all areas of business. The challenge organizations face is that they often have siloed, fragmented systems and data. And if you rely on a premises-based system, innovation is slow, limited and inaccessible. Great experiences happen when an experience is contextual, personal and fast.

Orchestrating those experiences is the differentiator at the heart of an open cloud platform. It offers businesses access to the major capabilities needed to deliver end-to-end experiences at scale. It encompasses these four areas:

This guide also includes an appendix with guidance on key questions to ask vendors about their solutions in each of the four areas, and what to look for in their responses.

The cloud

A single platform to support connected experiences

Digital

All-in-one capabilities for agents and customers

AI

Embedded for out-of-the-box use cases

Trust and security

Proven resiliency with global coverage

The cloud – A single platform for endless possibilities

Every touchpoint is an opportunity. It's possible to capture them when you bring together different data sources to get a complete view of your customer in real time, across all your critical business applications.

When data is stored in multiple systems, it's almost impossible to maintain a single view of each customer that includes real-time context of every customer journey. An open cloud platform enables you to manage billions of interactions, all your customer and employee data. Whether this data is generated inside or outside of your cloud platform, it becomes available for use cases and applied for improved experiences. This could be creating a single view of the customer, predicting outcomes or redacting sensitive information before an agent accesses it. Using the same data set across all services — such as routing, schedules and forecasting — enhances machine learning models and workflows.

A cloud-based platform also enables you to easily export data to other systems and tools within your ecosystem, including your CRM system, marketing systems, data lakes and so on. Perhaps most importantly, it reduces the risks associated with multiple platforms that often introduce security, privacy and compliance issues.

All-in-one modern architecture

With one platform based on one code base, you have a foundation for orchestrating better user experiences in real time. An integrated set of native cloud capabilities can work together seamlessly to provide instant and virtually unlimited scale to support the most dynamic and demanding workloads. And in the event of a failure, look for an open cloud platform that can recover on its own without service disruption or data loss.

Innovation at speed and scale

The flexibility inherent in the cloud encourages innovation by supporting a broad range of applications and services, which can be tailored to your unique use cases. Because updates of new capabilities are easier in the cloud, you can respond quickly to changing business needs. You can also start your journey at any point. For example, you can turn on product features as existing systems age out, needs evolve or new opportunities emerge. And you'll get value faster because integrated and automated services streamline testing, provisioning and more.

Global reach and local presence

Your customers' data should be secure and compliant — no matter the location of your operations. As you compare platform options, review these three areas:

- A **shared security model** to reduce the operational responsibilities of your security team and offer higher standards of security than most organizations can achieve in-house.
- **Multiple layers of data safeguards and controls** to maintain the confidentiality, integrity and availability of your data. All customer data should be encrypted, both in transit and at rest.
- **Compliance certifications** and attestations validate the vendor's commitment to help you operate within a complex global regulatory environment.

Digital – All-in-one connections for voice, digital and workforce engagement

Consumers' increased adoption of digital technology has created a sense of urgency to ensure they're supported on more channels. While this might serve an urgent need, it's only the start of true transformation. Without a cohesive, connected strategy, you'll still have limited insights into the bigger picture of customer and employee engagement and how to act on them.

Align your digital strategy and technology around a connected, consistent experience that includes digital channels, voice and the management of employees who engage with customers. Those connections enable you to transform experiences with personalization and optimize experiences based on contextual understanding.

An all-in-one suite of digital capabilities — enhanced with bots and predictive AI — simplifies the way your agents engage customers and each other, on any digital channel. The cloud eliminates the silos between channels for streamlined customer journeys. By making the channel incidental to the journey, customers and agents have a centralized and consistent experience. With all your channels, tools and the insights captured and connected in one place, you can support and manage the entire contact center while optimizing customer and agent experiences.

Connected experiences

Do more than streamline your operations and reduce costs. By connecting all experiences, you have a single, consolidated view of customer journeys and intents — captured as they interact with bots, agents and content on all your digital channels. With that single view, you can make more impactful decisions. Viewing everything in a single workspace, agents can easily see how to best serve each customer based on insights into their current and previous visits, without searching for that information. And when knowledge is accessible by all, your customers, agents and bots will stay in sync.

Capture clues and take action

Using all available customer data lets you tailor experiences to be more relevant and meaningful, whether for existing customers or prospects. When visitors interact with your bots, agents and content, they leave clues about who they are and what they want. Linking these clues and identities across all channels presents agents with the whole picture of the customer. It also enables you to use predictive routing to automatically direct them to the agent most qualified to assist them. Or you can use predictive engagement to make an offer at exactly the right moment to increase conversions and satisfaction.

Continuously improve and optimize journeys

With connected data, real-time monitoring of activity in all channels reveals what's important to customers and identifies bottlenecks in their journeys. Use those insights and focus your resources to optimize journeys where they'll have the most impact. Decision-making based on that data means that administrators can quickly modify workflows, drive toward goals and deliver on KPIs by optimizing existing resources for future experiences.

Make it easier for employees to win

Employees want to be successful, and they want work-life balance. In fact, these are critical to reducing employee turnover.

Using the AI and automation that powers all digital interactions, you can improve productivity as you build their engagement. That includes advanced forecasting for more flexible scheduling options, assessing the quality of their work and giving employees performance feedback.

Automation also simplifies decision-making processes to achieve organizational goals. By equipping employees with tools to be successful, they'll develop new skills that grow their careers long-term.

AI

AI for faster innovation

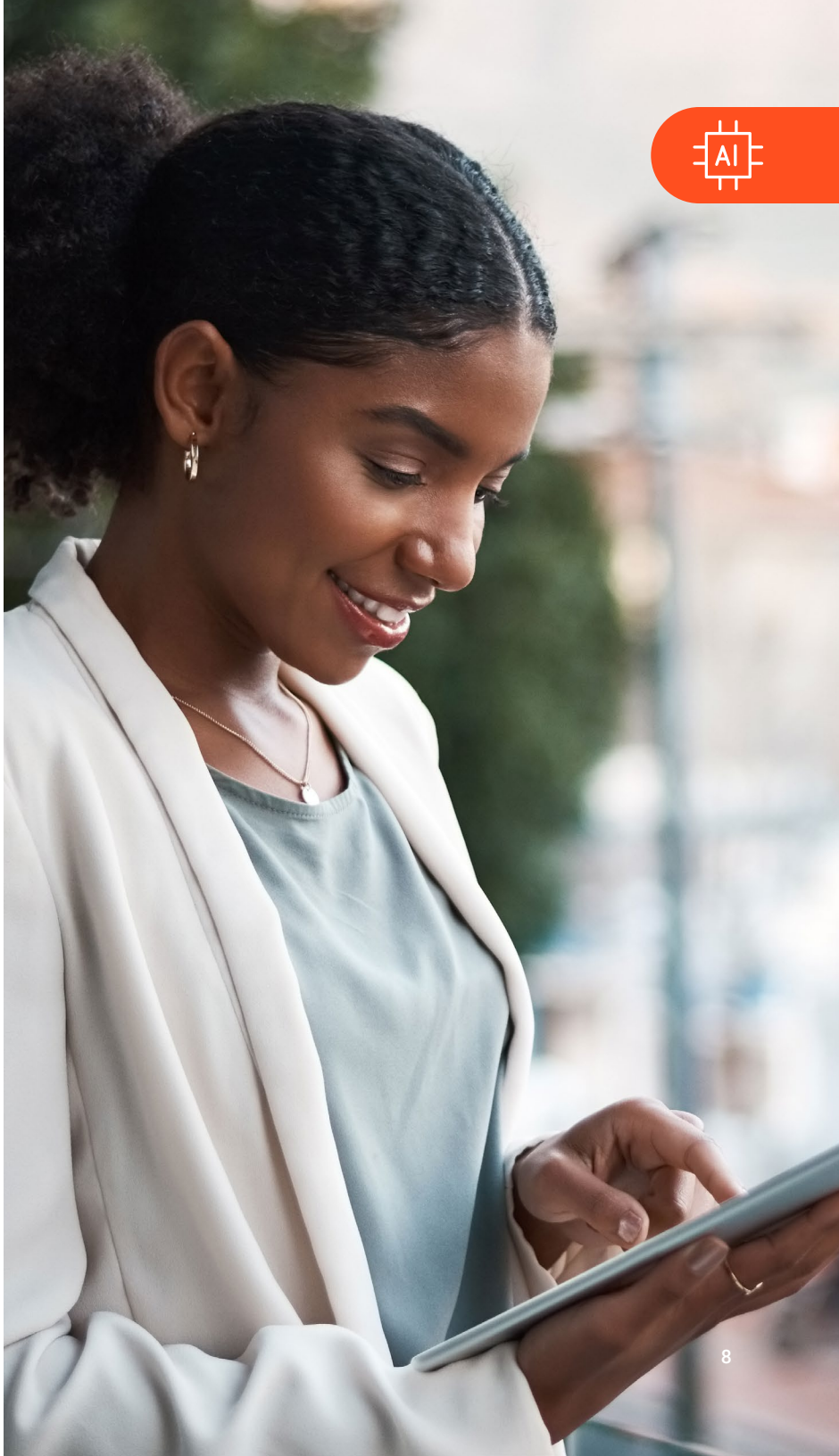
AI is transforming many industries as organizations take advantage of multiple capabilities in a single cloud platform. Using the power of data and automation, businesses can create new products and services, streamline operations, and enhance the experiences of customers and employees.

The value of AI is in the wide range of capabilities it enables that support innovation, including conversational AI services with generative AI for automation with a human touch. Predictive AI equips businesses with deeper customer insights for personalization and accurate forecasts to improve workforce planning. And because implementation and maintenance is simplified, AI reduces overall costs and complexity.

Realize AI value faster – When AI is embedded and ready out of the box, you'll minimize costs found in expensive point solutions and empower your entire team with simple user interfaces.

Build customer loyalty – Anticipate customer needs and provide personalized service that differentiates your brand across every interaction.

Elevate employees with AI – Automate tedious tasks with call summarization, forecasting and scheduling. Help employees provide the right answer with intent-based knowledge surfacing.



Personalization at scale

A modern CX platform with embedded AI capabilities can use AI-powered predictive engagement to identify customer behavior patterns to predict segments and outcomes. Those predictions can then drive automated offers and more personalized conversations.

In self-service interactions, conversational AI listens, understands and engages through natural language. With these insights and because AI also predicts intent, customers get faster resolutions. AI recognizes when human support is needed and then passes conversational history and insight to the agent.

Create a customer-focused workforce

AI-enabled workforce engagement management solutions support, motivate and empower global teams. With smart process automation and real-time support for agents, you'll streamline their experiences with customers.

The predictive power of AI equips managers with smarter workload forecasts that maximize work-life balance without jeopardizing service levels. And with speech and text analytics, you can pinpoint development needs for more personalized coaching. Gamified performance management tools and deeper customer insights keep teams engaged.

Smarter self-service and automation

Intelligent automation uses data to make intentional connections so that customers are automatically routed to agents based on KPIs that are meaningful to the business. AI also powers predictive routing to optimize operational KPIs such as average handle time, transfer rates or sales KPIs. This drives real-time action and simplifies workflows. And predictive AI is used by predictive engagement, which captures the digital journey and then enables proactive engagement. For example, sharing a coupon might encourage a customer whose buying journey has stalled.

AI ethics protects your business

Privacy, security, bias and ethical AI aren't barriers to cloud adoption when the platform is built on an ethical foundation you can trust. Following strict AI ethics guidelines safeguards your business by applying AI with a purpose; adhering to data and security best practices; and addressing bias.

Eliminating all bias is impossible. But modern tools help you understand the potential for bias in customer and employee experience applications of AI — enabling you to watch and mitigate it.

Trust and security

Trust and transparency: The foundation of long-term relationships

As you deploy AI tools, your top concern should be your customers' data and privacy. Establishing trust is vital in ensuring that customers have confidence in AI systems to operate reliably, accurately and ethically. When customers see the benefits of sharing their data in the form of more personalized experiences, it will build trust and loyalty. This also makes it unappealing for them to switch to brands that don't use their data to personalize experiences.

This trust is built through transparency. For example, making the details of AI algorithms both explainable and understandable to stakeholders fosters confidence in the decision-making processes of you and your customers. Transparency should include access to information about data sources, how models are trained and awareness of potential biases that are checked. This approach gives you the ability to address and mitigate concerns about fairness and accountability up front.

Transparency into how algorithms are applied equips your team to understand the impact on your operation and maintain control over the outcomes. Implementing ethical AI practices, robust data governance and comprehensive frameworks you can explain fosters trust among users, encouraging widespread acceptance and the responsible use of AI technologies.

Reputation

Consider the companies that are using the platform. Are they brands you recognize and respect? That reputation might apply only to your industry, or it could be a global brand. Secure, reliable services are most important.

Full transparency

Expect maximum uptime, backed by an aggressive SLA with up to a 100% credit guarantee. Metrics on system availability and SLA terms should be fully transparent and publicly accessible — not locked behind a login. You'll want this information before you make any commitment.

Resiliency

In the event of a failure, a cloud platform should be able to recover on its own without service disruption or data loss. Look for multiple availability zones that are geographically separate to significantly reduce the risk of a single event impacting service. This gives you out-of-the box regional resiliency.

Connected services

Services should be available in most developed nations with many globally distributed regions. Consider how these regions are connected. For example, the best data fabric architectures will optimize media paths to minimize latency and improve service quality. This enables call recordings to be stored in-region for data residency compliance.

Compliance

Your vendor's approach to compliance should be aligned with industry best practices, international standards and, where applicable, national legislation. Verify any global certification information.

Conclusion

Focusing on customer experience as your top-level differentiator for the short and long term is a smart approach. But contact center leaders need more than technical capabilities. It's having a cloud foundation powered by AI that enables the innovative practices of leading businesses.

It's more than automation to minimize costs. Transformation is about innovation that serves customers in a way that builds loyalty. It's possible to deliver empathetic and personalized experiences at scale.

No matter where customer conversations start or end, the Genesys Cloud™ platform helps you orchestrate every step of every experience through a full suite of omnichannel options, built-in employee experience capabilities, turnkey AI and end-to-end journey optimization.

See how the Genesys Cloud platform can power your business now and in the future.

Learn more about it

Appendix

Key questions to ask vendors about their solutions, and what to look for in their responses

The cloud (platform)

ASK THESE QUESTIONS	AND LOOK FOR THIS IN THE RESPONSES
Is there a requirement for centralized administration?	• Web-based UI allows for administration of all components, displayed by modules. • Within the admin UI, modules include account settings, directory, routing, documents and more available for licensing. • Admin roles are available to administer different parts of the solution based on role assignments and permissions. • Flexibility in provisioning services enables centralized management UI for all elements of the contact center: queues, agents, campaigns, skills, phones, endpoints and telephony.
What is the scalability plan for the organization, including scalability on demand and for future growth?	• There is unlimited scalability across the platform. • Architecture resides within Amazon Web Services (AWS) due to its scale and sophistication. • The solution can handle a virtually unlimited number of users and events — and it can increase capacity on the fly, as needed. This “bursting” capability also separates an AWS-based cloud service from others.
What deployment models do you offer?	• Three models offer maximum flexibility: cloud delivery with voice; Bring Your Own Carrier on-premises with Edge appliances; and Bring Your Own Carrier Cloud. • By taking full advantage of the distributed nature of the cloud, you’ll have rapid deployment, industry-leading reliability, and unlimited scalability to connect customers and employees.
Provide an overview of the technical architecture and its key dependencies.	• The solution uses a microservices architecture. • Core components are separated into self-contained, loosely coupled services deployed within an AWS infrastructure.

ASK THESE QUESTIONS	AND LOOK FOR THIS IN THE RESPONSES
What is the data storage and retention period expected from the solution?	• Data can be kept on the platform for the term of the agreement. • Reporting data is available live from the API and user applications for up to five years. Data older than five years is held in an archive state. • Look for the application of a fair use policy for data storage, and tools that track actual storage and the ability to adjust your retention policy.
Is there support for knowledge base and any tools that facilitate just-in-time and on-the-job learning for the agent?	• Supports a document library for personal, team and contact center media storage (can be a personalized resource library and FAQ repository). • Supports context-aware online help within the UI, links to user groups, training videos, and a broader in-app Resource Center. • For existing knowledge bases and web-based applications providing access to knowledge resources, the solution incorporates web apps easily into the user experience. • For custom integrations to external knowledge bases, an API may be required, or a partner-developed integration.

Digital

ASK THESE QUESTIONS	AND LOOK FOR THIS IN THE RESPONSES
What ACD type and agent process flow or routing rules do you offer?	• Architected from the start with a single routing engine that supports all channels: email, voice, web messaging, chat, SMS, direct messaging social channels (such as WhatsApp, Facebook, X and LINE). • Open messaging allows for seamless queuing and simple-to-complex routing. • CRM system data and other data can be queried for dynamic routing, personalized treatment and extensive screen-pop information. Everything from basic customer demographics to up-sell suggestions can be dynamically offered to the agent desktop. • As the customer journey moves between channels, a comprehensive interaction history is available to the agent in a single panel. • Supervisors and agents use real-time dynamic views, dashboards and reports to see contact center performance and metrics.
How are calls treated and transferred to agents?	• Agents can transfer ACD-based calls to another person, number or queue. • Calls can be transferred directly to the destination (cold transfer) or by performing a Consult Transfer (warm transfer). The Consult Transfer has multiple controls and can speak with the intended recipient before transferring the call. Agents can also place the call on hold while they engage with other customers or perform other tasks pertinent to that interaction, via the same UI. Call attributes are maintained if contact is transferred to another agent.
What is the data storage and retention period expected from the solution?	• Data can be kept on the platform for the term of the agreement. • Reporting data is available live from the API and user applications for up to five years. Data older than five years is held in an archive state. • Application of a fair use policy is used for data storage; tools track actual storage; you have the ability to adjust your retention policy.

ASK THESE QUESTIONS	AND LOOK FOR THIS IN THE RESPONSES
Describe the backend host integration for CRM, core systems and knowledge base or Agent Assist.	• Exposes its capabilities via a REST API that can be used for CTI and agent screen pop functionality. This is completely software-based without the use of additional servers. • You may choose to integrate external business systems, such as CRM solutions, to leverage dynamic data dips for routing purposes. • Native communication is through RESTful web services. • An online marketplace offers plugins, components and even entire application services built by third parties. • Data actions are used to post information to REST API systems or to middleware web services that can then pass that information to third-party systems that use other non-REST data exchange methods.
Is there support for knowledge base and any tools that facilitate just-in-time and on-the-job learning for the agent?	• The solution supports a document library for a personal, team and contact center media storage. This can be a personalized resource library and FAQ repository. • It should also support context-aware online help within the UI, links to user groups, training videos and a broader in-app resource center. • For existing knowledge bases and web-based applications that provide access to knowledge resources, the solution incorporates web apps easily into the user experience. • For custom integrations to external knowledge bases, an API may be required or a partner-developed integration might be used.
Is there secure co-browsing, whether agent or customer initiated?	• Co-browse capability is offered for agents handling chat and voice interactions. Agents can request viewer control to interact with the customer's web session using annotations and page control. • The customer must accept the request from the agent to give control. Once an agent has viewer control, the customer can view the agent's activity on the web page.

ASK THESE QUESTIONS	AND LOOK FOR THIS IN THE RESPONSES
Which chat applications do you offer?	• Web chat is treated as an interaction type; the solution handles the interaction and assigns it to an available agent who meets the selection criteria. Web chat sessions with a live agent can be routed in the same way as any other interaction. • Authenticated chat adds a layer of security to web chat connections by allowing administrators to optionally configure web chat to accept only inbound sessions from authenticated users. • As with all interaction types, recording, quality management, forecasting and scheduling is supported. • Like other interaction types, web chat has standard transfer and disconnect controls, wrap-up codes and notes. • Agents can use canned responses or dynamic scripts for rapid and consistent answers. • Agent utilization can be configured to let them handle multiple chats at a time.
What is the extent of integration with social media?	• Inbound routing is available for Facebook Messenger, X Direct Message (formerly Twitter), WhatsApp and LINE Messaging. • Messaging flows enable CRM system integration, skills-based routing and leveraging message content to inform routing. • The solution treats multiple messages as part of the same threaded conversation and routes them to the same agent with the complete conversation history. • Messaging is fully supported with quality management, analytics, real-time dashboards, forecasting, and scheduling. Canned responses, wrap-up codes, scripting, and emojis are also available. • For organizations that have multiple accounts on a single messaging platform, you can configure separate routing for each account. Bots can interact with customers via messaging channels.

ASK THESE QUESTIONS	AND LOOK FOR THIS IN THE RESPONSES
How can you design, integrate and deploy bots?	• Various options available for voice and digital bots, such as Bring Your Own Bots, bot chaining and the use of native bots. • Other options should include bot vendor integrations, meaning you can use multiple bot vendors with ease. This includes designing or reusing a Google Dialogflow, Amazon Lex, or Nuance Mix Dialog bot and easily connect the bot to a voice or messaging flow. • You can build the bot once and then deploy it across multiple channels to easily offer consistently great service across all channels. • IVR flows and routing flows all built within one interface. Database integration lets you identify and verify customers in the IVR for easy self-serve and to provide an exceptional personalized journey in the IVR. • Being able to deploy voicebots easily in the IVR increases self-service success rates and reduces the number of calls redirected out of the IVR to a live agent. If the customer has issues, they can be pushed to an SMS channel first to continue their journey.
How do your use sentiment analysis and how does it tie into customer feedback?	• Sentiment analysis is performed on the transcript generated from each interaction. It classifies each customer phrase as a positive, negative or neutral attitude based on the language used throughout the interaction. • A sentiment score is assigned to a phrase based on the magnitude of positivity or negativity detected within that phrase. • Administrators and contact center managers can provide feedback on specific sentiment phrases marked as positive, negative or neutral to help with training. • Interaction details show if a survey was sent and the status of that survey, for example, pending, sent, in-progress, expired and the content of the survey with results.

ASK THESE QUESTIONS	AND LOOK FOR THIS IN THE RESPONSES
Can chatbot conversations be continuously improved and reclassified based on customer intent?	• AI-powered Natural Language Understanding (NLU) models should be trained by examples to classify customer intents and translate information they provide into information that can be used by machines to complete tasks – or handed off to agents. In this way, you can support customer inquiries via multiple channels including telephony, chat, SMS and messaging (e.g., Facebook Messenger, WhatsApp) • A supervised learning capability improves the accuracy of the bot and its NLU model over time, as customers interact with the bot. As the model is updated and retrained, the intent of customers can be correctly classified. • If an utterance has been predicted to correspond to an intent incorrectly, the intent associated with the phrase can be modified and the model updated accordingly to improve future accuracy.
Does the SMS system support integration to common enterprise SMS messaging systems, including compliance with integration standards.	• As a channel, SMS can use multiple brokers to give you the ability to use short codes and long codes. Robust number searching options and instant number purchase and provisioning allow quick setup of SMS. • Global companies should look for SMS numbers offered in at least 30 countries, with outbound SMS support in more than 200 countries. • Messaging flows should enable skills-based routing and Interactive Text Response (ITR) routing decisions, based on data from your CRM system. • Like other interaction types, SMS has standard blind transfer and disconnect controls, canned responses, wrap-up codes, scripting capabilities and notes. • Agents should be able to see the context of previous interactions within the last 72 hours, for continuity of conversations. Messaging bots can also interact conversationally with customers via SMS and hand off to human agents, with context, when necessary.

ASK THESE QUESTIONS	AND LOOK FOR THIS IN THE RESPONSES
Which types of rich media and documents can be uploaded?	• Support should be available for a variety of rich media features for SMS and messaging apps such as WhatsApp. • Messaging apps support inline images, emojis and file transfers. Customers can also send MMS messages to agents over SMS conversations. • Customers who use web messaging can attach inbound images to their messaging conversation with their device's copy-and-paste function. This lets customers immediately attach images such as screenshots without saving to a local drive.
How are outbound campaigns supported?	• Outbound dialing campaigns contact a list of people according to a prescribed set of rules, placing calls based on information read from a contact list. • Campaigns increase agent productivity by screening out answering machines, busy signals and non-completed calls. By setting a campaign's dialing mode, administrators can ensure that agents receive only those calls that reached a live person. • Each campaign has a script that defines the agent experience. When a screen pop occurs, the script populates the agent's display with information pertaining to the call, the customer and the campaign based on the behavior defined in the script. • The contact list is updated with Information collected or modified by the agent. Outbound dialing keeps agent productivity high and idle time low.
Describe your workforce optimization (WFO) solution and whether it's traditional or analytics driven as with WEM?	• Workforce engagement management (WEM) resource management functionality simplifies the process of forecasting interactions and scheduling agents in multichannel contact centers, optimizing workforce performance to achieve operational goals. • A WEM solution enables you to configure business units and management units to organize agents, set service goal templates, create planning groups to achieve service goals, configure work plans and more.

ASK THESE QUESTIONS	AND LOOK FOR THIS IN THE RESPONSES
What dialing rules and strategy are used?	• Rule categories (pre-call or wrap-up) determine whether rule conditions are evaluated before the call is made or after the call is disconnected. • Rule conditions are tested to determine whether to perform actions. Conditions can evaluate the value of a call analysis, contact list column, contact property, phone number, phone number type or wrap-up code. • Before the call begins, pre-call actions can set a caller ID number and name before dialing, prevent a number from being dialed, dial in preview mode or update the value of a contact column.
How is agent performance measured?	• Performance tools are designed to provide supervisors and contact center managers with a view of real-time metrics for their contact center. Views display real-time contact center metrics for agents and queues. • An agent performance summary view should display current and historical metrics and data about agents. When the view updates automatically, filters can update, too, and you can export the data in the same view.
What options does your workforce management solution offer for forecasting and scheduling?	WEM provides three methods of schedule creation to accommodate planning needs. 1. Create schedule with forecasts: These load-based schedules use the scheduling engine to determine the best way to meet the needs in the forecast. The process uses the constraints that come from work plans and the agents in those work plans. 2. Create schedule without forecast: These schedules create a blank schedule for expected shift patterns when no forecast is available. This method improves the scheduling algorithm by using the shortest, median, longest or staggered time span for the selected shift length — and the earliest, median, latest or staggered start times for flexible shifts. 3. Create a blank schedule: Blank schedules rely on the administrator to add agents, create shifts and configure schedule parameters.

ASK THESE QUESTIONS	AND LOOK FOR THIS IN THE RESPONSES
Do you have self-service on WFO?	• Agents can access their schedules from the agent dashboard, viewing schedules by week, month or year, as well as details about out-of-adherence notifications. • You can submit and manage time-off requests and view approved and pending requests as well as view time-off notifications. You can create, post, accept and manage shift trades and view the status of shift trade status in your inbox. • A mobile application enables agents to view their schedules, submit or view time-off requests, and request shift trades. Agents can also proactively report when they will be late for their next scheduled activity.
Is there integration between the learning and training tool and the WFM?	• Learning managers can create modules to deliver information and training content directly to an agent's inbox. • Administrators can automatically assign modules using business rules to effectively and efficiently onboard agents and aid their development. • Managers can make these courses available to new agents to help with onboarding and using the system. • WEM administrators can create new modules and add content relevant to their organization. And WEM administrators can add bulk events to schedules with a few clicks. You should also be able to integrate solutions from other vendors or use pre-built integrations.
Describe your system's speech and text analytics.	• Speech and text analytics provide deep insight into all customer conversations and interactions. • For voice interactions, look for automated voice transcription using a native transcription engine. It should be trained using deep learning techniques that use an adaptive language model based on configured phrases. Voice transcription occurs in near real-time, and the full transcript of a call is available immediately after that call is completed. Acoustic analyses of interactions also extract meaning from otherwise unstructured data. • For all interaction types, sentiment analysis should be based on what was said or typed by the customer. You'll gain performance improvements, such as decreased AHT and increased FCR, higher compliance and a better understanding of call reasons.

AI-powered (conversational, predictive)

ASK THESE QUESTIONS	AND LOOK FOR THIS IN THE RESPONSES
How is AI applied in your environment and processes?	The solution should use artificial intelligence (AI) capabilities in several key areas, including: • Predictive engagement uses advanced contact center AI to find, win and keep online prospects and customers by engaging them at the right moment — and with the right resources and actions. • Bot flows use AI to create better chatbots and voicebots. By orchestrating native and third-party bots along the customer journey, you can create exceptional experiences. • Workforce engagement tools analyze employee performance and identify top performers' specific skills, knowledge and behaviors. Data is used to better match employees to each customer and the situation. • Predictive routing works in real time. AI is used to match customers to the agents most likely to provide the best experience. This improves key business metrics, such as handle time and transfer rate. • Agent assist reduces the time agents spend searching for answers. It proactively provides live agents with personalized recommendations and guidance on the next-best actions in context during interactions. Agent assist also uses generative AI to summarize digital and voice interactions. • Native speech and text analytics employ natural language understanding (NLU), transcription, sentiment analysis and topic spotting to identify key events. These insights are used to improve customer experience.
Are there built-in AI-based routing (machine learning-based) capabilities focused on business outcome optimization?	• Predictive routing works in real time, using machine learning to continuously analyze hundreds of data points to identify data patterns and predict outcomes to match customers to agents most likely to deliver the best customer experiences, grow revenue, and improve contact center KPIs.

ASK THESE QUESTIONS	AND LOOK FOR THIS IN THE RESPONSES
Which omnichannel artificial intelligence (AI) technologies are supported?	• Should support the use of multiple bots (or virtual agents) to assist customers through different flows and channels. These bots enable the platform to interact with customers. These bot conversations become part of the customer's interaction history, traveling with the customer across channels and over time. • While customers benefit through the use of fast and effective support from bots, the customer and agent conversation also gets a boost. The agent-assist capabilities provide agents with information on caller intent and can provide support for every moment of a conversation, suggesting actions or offering up content.
Are there any virtual agent (Bot/AI) capabilities to automate intelligent responses without needing to queue to an agent?	• Integrations to many virtual assistant tools, including services that identify intent and perform entity extraction on natural language inputs. Tools might include Amazon Lex and Google Dialogflow, Botter, Aivo, Omilia, Lynn, IBM Watson and many others. • An open solution that's extensible through APIs that enables and supports any chatbot.
Are there solutions to use AI in the routing decision-making processes for interactions?	• Built-in A/B testing is a valuable capability. When activated in comparison mode, predictive routing will run one hour on and the next hour off for the duration of the testing period. • Results on a queue can be measured and filtered by the solution – used or not – giving you a measure of the target KPI when during on and off periods. This A/B testing approach provides a clear measure of the benefit obtained when the solution is on, targeting the same service line and agent group.
Does the solution provide reporting for bot intent recognition?	• Administrators and contact center managers can access bot performance metrics in detail and in summary. This enables administrators to gain insight into the number of entries, turns, durations and intents for bots that the solution supports. • Developers can use an operational bot reporting API to gain insight into operational metrics for bots that are supported. For some bot flows, the API contains additional statistics to better understand bot conclusion data.

Trust and transparency (proven, reliable, resilient)

ASK THESE QUESTIONS	AND LOOK FOR THIS IN THE RESPONSES
How does the solution comply with enterprise-grade security?	• Based on ISO certifications, your vendor will have implemented and maintained an information security program that follows generally accepted system security principles embodied in ISO standards. This program is designed to protect customer data as appropriate to the nature and scope of the services provided. Here are a few to review. • Using state-of-the-art tools in the cloud, with centralized SIEM, correlates events and alerts. • Encrypting all data connections to the solution browser, mobile and other components —- secured via HTTPS and TLS. • Encryption at rest that uses industry-standard technologies, a combination of SSE and object-level encryption. • Allows for encryption of all voice traffic using SIP signaling and IP voice. • Ability to encrypt all call recordings, faxes and instant messages. • Password hashing capabilities use cryptographic methods for extreme resilience to rainbow table attacks. • Meets AWS security and certifications.
Do you perform network vulnerability scans for the solution?	• Your vendor's team should constantly perform internal authenticated vulnerability scans on internal services. External scans by ASV should also be performed to meet PCI requirements.

ASK THESE QUESTIONS	AND LOOK FOR THIS IN THE RESPONSES
Is the architecture designed with inherent geo-redundancy with at least three data centers configured with active-active resiliency?	• Deployed in multiple AWS Availability Zones (AZs), with each zone engineered to be insulated from failures in other locations. Each AZ is isolated, but the AZs in a region are connected through low-latency links. Each AZ is designed as an independent failure zone. This means that AZs are physically separated within a typical metropolitan region and are in lower-risk flood plains (specific flood zone categorization varies by AWS region). • In addition to discrete Uninterruptible Power Supply (UPS) and onsite backup generation facilities, data centers located in different AZs are designed to be supplied by independent substations to reduce the risk of an event on the power grid impacting more than one AZ. Each AZ is redundantly connected to multiple tier-1 transit providers.

GENESYS

About Genesys

Genesys empowers more than 7,500 organizations in over 100 countries to improve loyalty and business outcomes by creating the best experiences for customers and employees. Through Genesys Cloud, the #1 AI-powered experience orchestration platform, Genesys delivers the future of CX to organizations of all sizes so they can provide empathetic, personalized experience at scale. As the trusted, all-in-one platform born in the cloud, Genesys Cloud accelerates growth for organizations by enabling them to differentiate with the right customer experience at the right time, while driving stronger workforce engagement, efficiency and operational improvements.

Visit us at **genesys.com** or call us at +1.888.436.3797.