

SINGLE CUSTOMER VIEW POWERED BY IDENTITY RESOLUTION

September 2022



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WHAT IS SINGLE CUSTOMER VIEW

Single Customer View powered by Identity Resolution

associates an External Contact ID to all conversations.

stitching **conversations cross channel** throughout an organization.

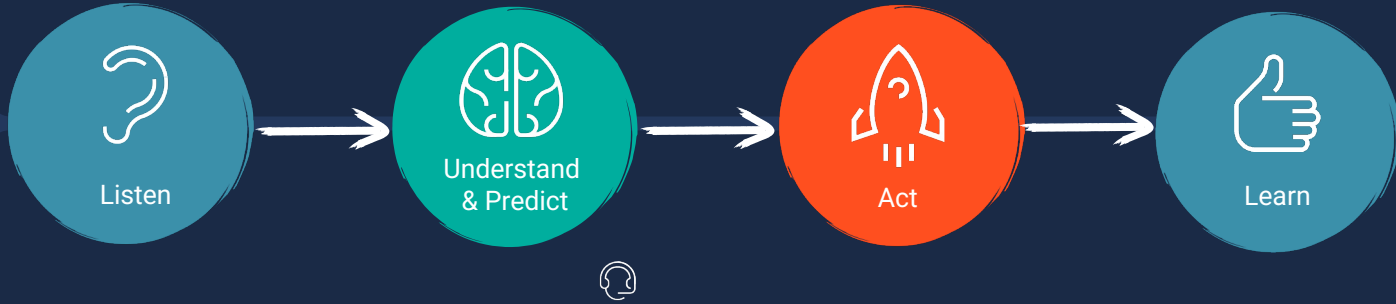
- * Moving from singular interaction to omnichannel
- * It's a feature enhancement of External Contacts that is foundational for conversations across all channels to be synced together in a unified Single Customer View.

CUSTOMER CENTRIC PLATFORM DRIVES 1-1 ENGAGEMENT

OMNICHANNEL CX



Best channel, best time, best action



Historical Behavior and Intent



Segmentation & Clustering



Outcome Prediction



Next Best Action



Chat and Voicebots



Predictive Routing



Agent Assist



Voice of the Customer and Employee



Business Results



Identity Resolution



Holistic Profile



Journey Data Management



Data Governance

SINGLE CUSTOMER VIEW

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Single View of Customer - Benefits

1

Customer-Centric Platform

Automatically creating contacts for every interaction – benefits across platform

- Call deflection
- Reduce handling time
- Increase NPS scores
- Churn prevention

2

Rich Agent Context

Agents can see who the person is and their holistic customer journey

Genesys Cloud: Omnichannel conversation history



GPE: Web sessions, segments, outcome predictions

3

Enablement

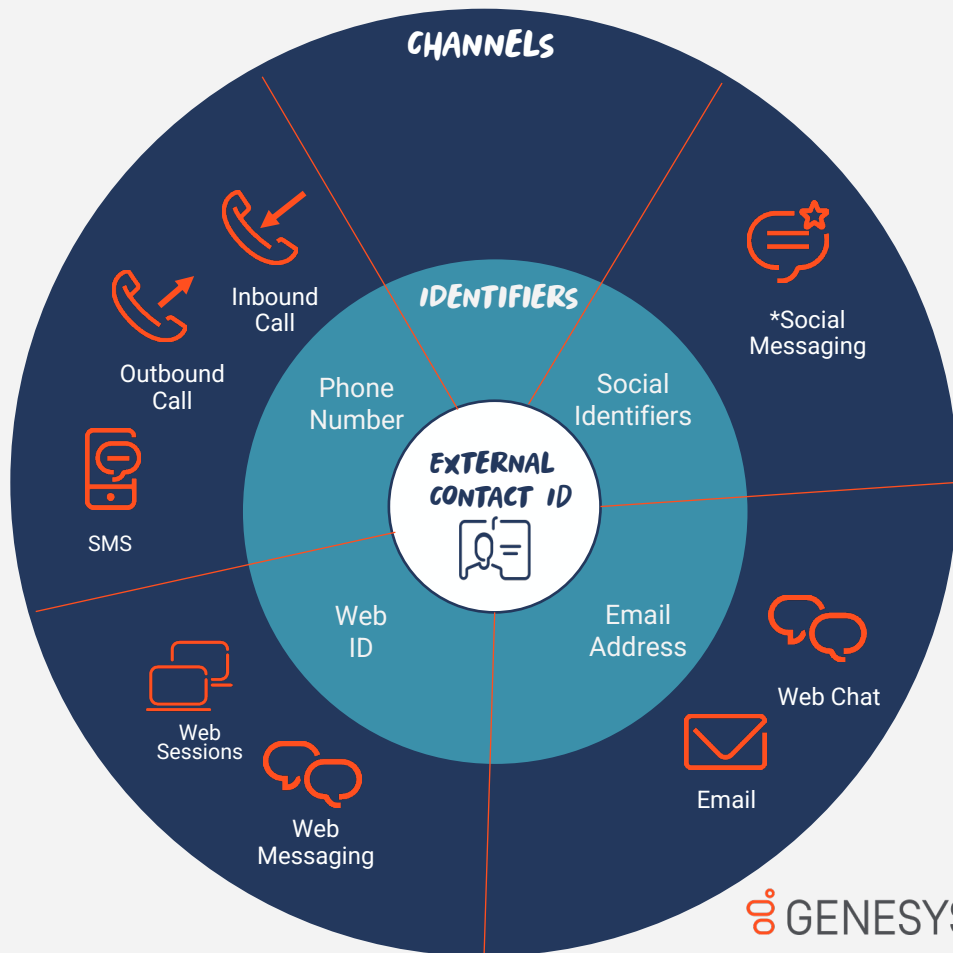
Orgs can orchestrate omnichannel personalized experiences

- Routing – predictive routing
- Bots
- Journey – Pointillist

PHASE 1 ON CORE CHANNELS WITH CORE IDENTIFIERS

- * A contact has many identifiers.
- * An identifier is a piece of Personal Identifiable Information (PII) unique to that contact.
- * Channels are all the voice and digital channels that customers can have a conversation.
- * Each conversation on a channel can be saved to that contact.

EXTERNAL
CONTACT ID



IMPLEMENTING SINGLE CUSTOMER VIEW - PERMISSION ONLY CONFIGURATION

From when Single Customer View is enabled, every conversation will automatically have an External Contact ID attached to it.

Visual Changes:

Profile Panel Capability

Journey Tab Enablement

Action for Admin:

Enable all External Contacts permissions and the new permissions Promote and Merge on your agent's role.

Enable the External Contacts > Session > View permission and Journey Permissions (next slide)

Benefits:

Allows extra capability in the profile panel on the agent desktop to create and merge External Contacts

Journey tab appear on agent desktop showing active and historical conversations of that Contact

Merging is gated behind a separate permission and endpoint, so it's not something that will happen unless your organization explicitly chooses to grant agents permission to access it.

LIST OF ALL PERMISSIONS FOR GENESYS CLOUD NON PREDICTIVE ENGAGEMENT

External Contacts Permissions

- * To associate contact to an interaction: **Externalcontacts > Conversation > Associate**
- * To view interactions for a contact/account: **Externalcontacts > Conversation > Viewall**
- * To create a contact: **Externalcontacts > Contact > Add**
- * To view a contact: **Externalcontacts > Contact > View**
- * To update a contact: **Externalcontacts > Contact > Edit**
- * To delete a contact: **Externalcontacts > Contact > Delete**
- * To see a contact's journey: **Externalcontacts > Session > View**
- * To promote an auto-created contact to a curated contact (Add to contacts): **Externalcontacts > Identity > Promote**
- * To merge an auto-created contact to an existing curated contact: **Externalcontacts > Identity > Merge**

Journey Permissions

- * **Journey > Event > View** (core permission to view the Customer journey gadget and see the detailed view of conversation sessions)
- * **Journey > Event Type > View** (to view the conversation event details)
- * **Journey > Session > View** (to retrieve the list of conversation sessions)
- * **Journey > Session Type > View** (to retrieve only the conversation sessions)
- * **External contacts > Session > All permissions** (to allow admins to enable the journey tab)

LIST OF ALL PERMISSIONS FOR GENESYS CLOUD WITH PREDICTIVE ENGAGEMENT

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AND

- * **Journey > Outcome > View** (to see outcomes achieved and scores for a visit)
- * **Journey > OutcomeScores > View** (to see real-time predictions)
- * **Journey > Segment > View** (to see matched segments for a visit)
- * **Journey > Visit > View** (to see live tracking information about visitors on your website currently)

Identity Resolution Mechanics



IDENTITY RESOLUTION FUNDAMENTAL CONCEPTS

There is defined workflow for identity stitching of External Contacts based on their origin and the identification information available that generates three different types of contacts ensuring there is a logical process to identity resolution.

Contact Creation

Methods to generate contacts

- * API
- * Bulk import
- * Manual creation
- * Inbound/Outbound Communication

Contact Type

- * Ephemeral: no PII e.g. cookie, Web ID (Expires after 60 days)
- * Identified: some PII e.g. phone number, email address (Expires after 60 days)
- * Curated: PII - imported via API, bulk import, created manually (No expiry)

Transition

Promote

- Ephemeral and *identified* contacts change/promoted to *curated* once a user (agent/admin) or API client/integration modifies the contact e.g. adds a name

Merge

- Ephemeral and *identified* contacts can be merged with another contact.
- Curated contacts are searchable.

Conversations

- Conversations regardless of channel are saved for 60 days

The foundation for gathering journey data and context

WHAT HAPPENS WITH DUPLICATE CONTACTS WITH SAME IDENTIFIERS?

- * When two contact records indicate the same person

- * Results in a master contact

— Called the "canonical contact"

- * All contacts in the tree become aliases to the canonical contact

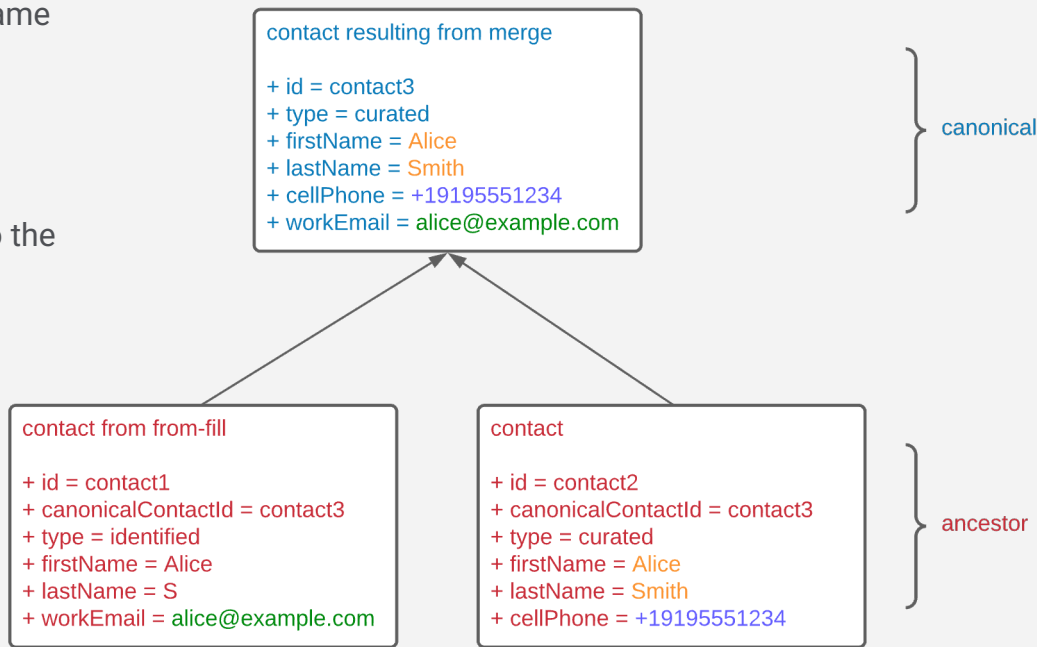
- * Join things from both contacts

— Attributes

— Identifiers / PII

— Notes

— Journeys



Agent Views



What is Changing on Agent Desktop?

Old Profile Tab View

+ Create New

Wrong contact? Search contacts

Locate and link contact

claire.murphy@genesys.com X

✓ Murphy, Contact C

✉ claire.murphy@genesys.com

1 Result

Murphy, Contact C ↗

Frequent Flyer

Details Notes

✉ Work
claire.murphy@genesys.com

✈ Frequent Flyer Information
Account Number
123
aNewField

Organization

Search Organizations

New Organization

✓ Contact Linked

Old Version:
Auto populates
in the search
box

New Version:
Agent manually
searches by
identifier in the
search box e.g.
email, contact
number.

New Profile Tab View

Profile icons and tools

Kelly, Efa ↗

Edit Contact
Unlink Contact

Details Notes

📍 Main, Street, Manhattan
New York H91596
IE
View on map

✉ Work
efakelly@example.com

Personal
efakelly@example2.com

Other
aofekelly3@example.com

📞 Mobile
+1 876 778 9680

Organization

Search Organizations

New Organization

New Profile Tab
View

New menu for
Editing and
unlinking the
conversation
from this Contact
profile

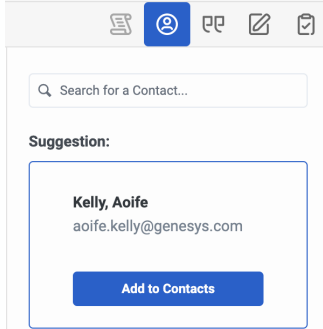
Example if Claire
rings in on Efa's
phone and the
agent knows this
from the call the
agent can unlink
the conversation
from Efa's profile.

PROFILE TAB CHANGE

Need to manually search for a contact for options to appear to add to the interaction to that contact

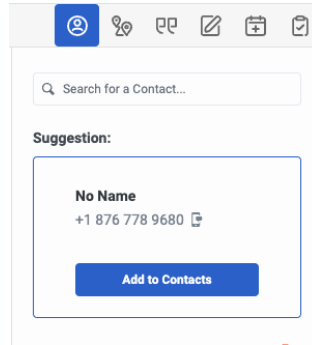
Example 1

Example of an inbound email being sent where first name and last name and email address is populated into the Suggested box



Example 2

Example of a phone call being sent where the name of the contact is unknown.



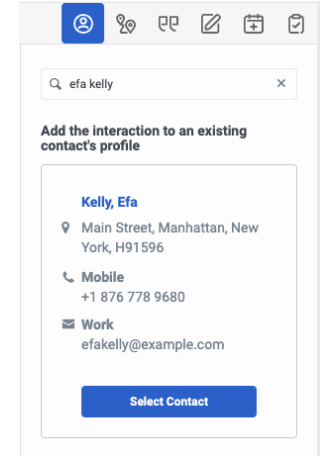
Option 1

Add to contacts i.e. create a new contact which when saved will become a Curated Contact

Option 2

Add the interaction to an existing Curated contact

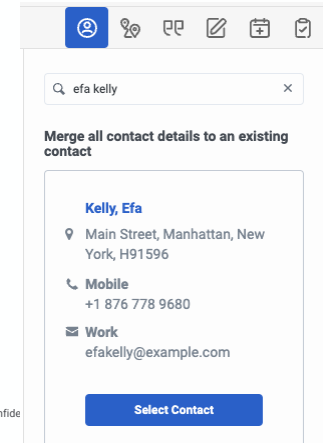
The interaction is added to Journey so interactions from the last 60 days can be seen on the journey tab.




Option 3


Merge with another identified contact that has not being saved as a curated contact by an agent, API or by admin.


Two curated contacts cannot be merged.





NON GPE JOURNEY TAB VIEW


**Activity**


External Contacts


Documents


Performance ▼

















Conversations

Reynolds, Cara

Support
Hey, could you please help with... 2 mins

Cara Reynolds

5:23

Tue, May 3, 2022 9:17 AM

Hi there, can you help me with my insurance claim please.

9:15:51 AM

Hello Cara! I hope you're keeping well. It looks like you're in the middle of the claims process. Is that correct?

9:15:51 AM

Yes that's correct. I just want to get an update on when the review process will be over.

9:15:51 AM

That's no problem Cara. I can help you with that. Give me a minute to take a look at your details.

9:15:51 AM



OKay thanks

9:15:51 AM

Okay Cara, I can see your details and can tell you that...

9:15:51 AM

Enter message...



On Queue





Live  Web message

Queue: Support

Agent: Martha West

Nov 14  Web session

Exit page: Contact us

Duration: 11 minutes

Nov 4  Outbound SMS

Queue: Support

Wrap-up: Insurance enquiry

Oct 28  Web message

Queue: Support

Wrap-up: Home insurance sale

Oct 18  Inbound call

Queue: Home insurance

Wrap-up: Insurance enquiry

Oct 14  Outbound call

Queue: Home insurance

Wrap-up: Insurance enquiry

Sep 30  Facebook

Queue: Home insurance

Wrap-up: Bill correction


rohibited.

SINGLE CUSTOMER VIEW - JOURNEY DETAILS

Standard information per interaction, regardless of channel

- ✓ queue
 - ✓ agent
 - ✓ wrap up code
 - ✓ status
 - ✓ duration
 - ✓ notes
- For asynchronous conversations, only notes for the most recent interaction will be displayed

The screenshot displays the Genesys Single Customer View - Journey Details interface. At the top, there is a dark header bar with a search icon, a bell icon, and a toggle switch labeled "Off Queue". Below the header, a navigation bar contains several icons: a list icon, a person icon, a circular icon, a blue square icon with a white star, a quote icon, a document icon, and a list icon. A "Back to journey" link is visible on the left. The main content area is divided into sections: "Web message" (Oct 28, 11:27 AM), "Notes" (Oct 28, 11:37 AM), "Martha West wrote" (Oct 28, 11:37 AM), "Chester Humphries wrote" (Oct 28, 10:21 AM), and "Henrietta Skinner wrote" (Oct 28, 9:15 AM). Each note contains the text: "Cara's looking for an update on her claim. She has been informed that her claim is under review and will be contacted within 3-4 working days." Below the notes, a "Message details" section lists the following information: Queue: Support, Agent: Dennis Burke, Wrap-up: Complaint, Status: Closed, and Duration: 20 min.

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GENESYS CLOUD + PREDICTIVE ENGAGEMENT - JOURNEY



Genesys Cloud™

Identifiers



Email Address



Phone Number



Web ID (Web Messenger)

Channel Stitching



Inbound Call



Outbound Call



Web Messaging



SMS



Email



Web Chat



Social Messaging



Genesys Predictive Engagement

Identifier



Web ID (Web Session)

Additional Channel Stitching



Cross Device
Stitching



Web Visit

Additional Context



Segments



Outcome
Predictions



Custom Events
(Optional)

S™

prohibited.

JOURNEY TAB WITH PREDICTIVE ENGAGEMENT

Activity

External Contacts

Documents

Performance

Conversations

Reynolds, Cara

Support

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9:15:51 AM

Okay thanks

9:15:51 AM

Okay Cara, I can see your details and can tell you that...

9:15:51 AM

Enter message...

Segments

Auto Insurance

Home Insurance

Onboarding

View more (+7)

Outcomes

Onboarding Likely

Health INS Unlikely

View more (+5)

Live	Web message	Queue: Support	Agent: Martha West
Nov 14	Web session	Exit page: Contact us	Duration: 11 minutes
Nov 4	Outbound SMS	Queue: Support	Wrap-up: Insurance enquiry
Oct 28	Web message	Queue: Support	Wrap-up: Home insurance sale
Oct 18	Inbound call	Queue: Home insurance	Wrap-up: Insurance enquiry
Oct 14	Outbound call	Queue: Home insurance	Wrap-up: Insurance enquiry
Sep 30	Facebook	Queue: Home insurance	Wrap-up: Bill correction

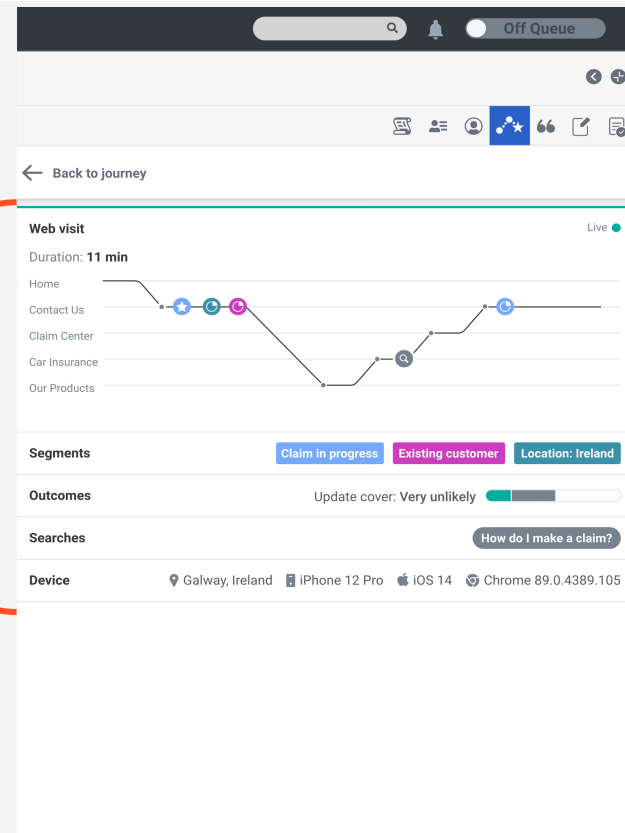
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SINGLE CUSTOMER VIEW - JOURNEY AND WEB VISITS WITH PREDICTIVE ENGAGEMENT

New styling for the web session journey

Same data points as currently in the Customer Journey tab



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WHATS NEXT?

Stitching More Channels

- * Agentless Notifications (partly support)
- * Authenticated Web Messaging
- * Open Messaging
- * Campaigns
- * Scheduled Call back
- * Instagram DM
- * Co-browse
- * Knowledge
- * More bot context –shows bot events that are the same as conversation events e.g. duration

Enhancements

- * Custom ID Support – e.g. CRM, CDP IDs, Open Messaging as additional identifier(s)
- * Transcripts on journey
- * Reopen closed interactions
- * Manual assignment from journey tab – e.g. pick up outstanding email
- * Contact merging enhancements

Divisions and Access Control

Current Status:

- * There is currently no division control of conversation data and External Contacts on a single Org.

Workaround:

- * With authorized organizations, you can establish a secure relationship with another Genesys Cloud organization. This relationship allows permitted users and groups from one organization to log in to another organization.

MORE INFORMATION

- * [Developer Blog post by Tech Lead Andrew Johnson](#)
- * Community Forum
- * [Genesys Cloud Documentation](#)

Thank you

Aoife Kelly – Product Manager Journey Platform

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September 2022



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