

Single Customer View Roadmap Update

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June, 2022



TERMS & CONDITIONS

The product roadmap presented is for informational purposes only. It represents Genesys' current plan of record for the associated products. Genesys at its sole discretion has the right to add or delete any features or functionalities from the current feature roadmap.

Dates in the product plans are only indicative of Genesys' current assessment and are subject to change. Genesys does not commit that any specific features or functionality will ultimately be released, made generally available, or provided.

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There are no penalties, liquidating damages or other remedies associated with changes to the product plans including cancellation of any specific feature or functionality or delay in the timing of development.

Terminology Changes

NEW	Identity Resolution	Single Customer View	Contacts & Organizations
PREVIOUS	<ul style="list-style-type: none">• Identity Stitching	<ul style="list-style-type: none">• Unified Customer View• External Contact & Journey• Contact Profile & Journey	<ul style="list-style-type: none">• External Contacts & External Organizations

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 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



EXTERNAL CONTACTS

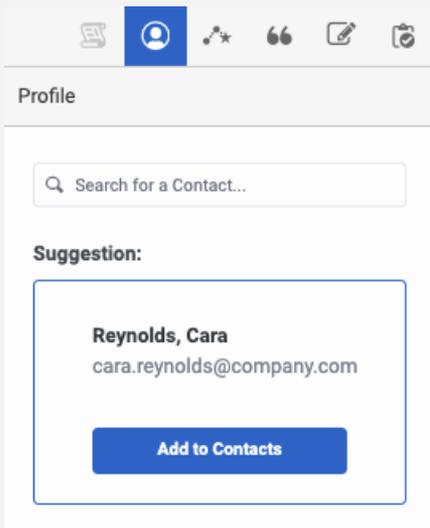
Create true omnichannel and personalized experiences for your customers.

IN PROGRESS

Identity Resolution* **BETA**

Contacts will be automatically created for incoming interactions, form fills or web visits, making it easier for agents to create new contacts, view omnichannel customer journey and for supervisors to get contact-centric analytics across channels.

<https://genesyscloud.ideas.aha.io/ideas/DIG-I-633>



The screenshot shows a user interface for managing contacts. At the top, there is a navigation bar with icons for a document, a profile, a star, a quote, a pencil, and a trash can. Below this is a section titled "Profile" with a search bar containing the text "Search for a Contact...". Underneath the search bar is a "Suggestion:" section. This section contains a card for a contact named "Reynolds, Cara" with the email address "cara.reynolds@company.com". At the bottom of the card is a blue button labeled "Add to Contacts".

Analytics – Filters and columns for external contacts* **BETA**

Enhance analytics views by providing filters and columns for external contacts.

<https://genesyscloud.ideas.aha.io/ideas/ANLS-I-828>

FedRAMP – External Contacts

Offer external contacts in FedRAMP environment

<https://genesyscloud.ideas.aha.io/ideas/DIG-I-1074>

*May span multiple intervals

AGENTS & IDENTITY RESOLUTION

The screenshot displays a customer service interface for a user named Cara Reynolds. The interface includes a sidebar with navigation icons, a main chat area, and a customer journey timeline. The chat history shows interactions with an Insurance Bot, Cara Reynolds, and James Gardener. The customer journey timeline lists various touchpoints such as Web Message, Email, and Inbound calls, along with the agents involved and the status of each interaction.

Activity Directory Documents Performance Reports Admin

Interactions Cara Reynolds

Cara Reynolds Support

Insurance Bot
Ok Cara, I'm going to connect you to one of our claims team now. Thanks for getting in touch!

Cara Reynolds
Thank you

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

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

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

Cara Reynolds
Okay. Thanks

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

Type here

Customer Journey

Live	Web Message	Queue: Motor Insurance Support	Agent: James Gardener	Wrap up
Live	Email	Queue: Motor Insurance Deboarding	Agent: -	Wrap Up
May 20	Inbound call	Queue: Motor Insurance Support	Agent: Huiyan Zhu	Wrap Up: Urgent Review Docs
May 16	Inbound call	Queue: Motor Insurance Support	Agent: Brad Seafeld	Wrap Up: Review Docs

The screenshot shows a 'Single Customer View' interface. It features a search bar at the top, a 'Suggestions' section, and a detailed view of the customer profile for Cara Reynolds. The profile includes the customer's name, email address, and phone number, along with an 'Add to Contacts' button.

Search for a contact ...

Suggestions:

Cara Reynolds
cara.reynolds@gmail.com
+1 650 999 9999
Add to Contacts

Single Customer View

EMPOWER AGENTS WITH CUSTOMER INFORMATION AND A VIEW INTO THE CUSTOMER'S PREVIOUS AND ONGOING TOUCHPOINTS. NO CONFIGURATION REQUIRED.

Automatically capture and present agents with customer profile and all previous and ongoing touchpoints across channels

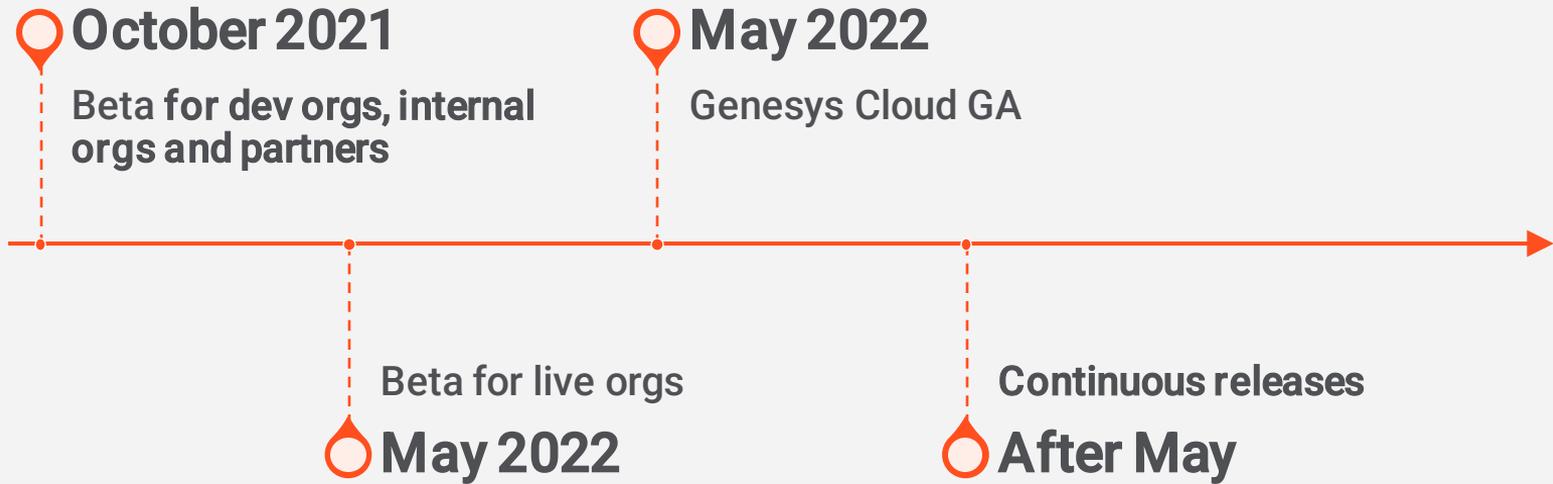
Get additional value with web activity or custom events by leveraging Genesys Predictive Engagement

Customers & their journey for agents

Automatic creation of customer profiles – ability to merge profiles and their journeys

Automatic capture and presentation of previous and ongoing touchpoints across channels

Timeline



Identity Resolution – Beta Progress

Channels Supported

Initial Beta – October 2021

- Web Messaging
- Inbound Calls
- Web Events
- Offers

New Features - Feb/March 2022

- Email
- SMS
- Web Chat
- Agent-Initiated Outbound (Email, SMS, Calls)

GA – Q2 2022

- 3rd Party Messaging Channels
 - WhatsApp
 - LINE
 - Twitter DM
 - Facebook Messenger

Upcoming

- Custom ID Support
- All Channels
- Authenticated Web Messaging
- Custom Events
- Open Messaging
- Mobile Messaging Enhancements
- Knowledge
- Agentless Notifications
- Campaigns
- Instagram



Identity Resolution - Upcoming

Platform Custom ID Support (L)

- Custom ID (CRM, Maritech, ERP, syncing contacts)
- Bring your own customer ID (platform, DSAR/GDPR)
- Supportive of Custom Events
- Authenticated Web Messaging
- Open Messaging
 - Upcoming Subtypes

Knowledge (S)

- Support Center (queries)

SMS (M)

- Agentless
- Campaigns

Voice (M)

- Campaigns
- Callbacks

Email (M)

- Agentless (beta)
- Campaigns (beta)

Agentless Messaging (M)

- Open messaging
- WhatsApp

Mobile Messaging Enhancements (M)

- Supported as generic web messaging today
- Device ID, journey

New Messaging Channels (S-M)

- Instagram
- MS Teams

Custom Events

Cobrowse (M)

- For web messaging/voice?

EXTERNAL CONTACTS - FUTURE LOOKING

Create true omnichannel and personalized experiences for your customers.

Identity Resolution – New Channels

Extend identity resolution to new channels. Authenticated web messaging, open messaging, custom events.

<https://genesyscloud.ideas.aha.io/ideas/DIG-I-1073>

Identity Resolution - Agentless Notifications and Campaigns

Extend identity stitching to agentless notifications and campaigns.

<https://genesyscloud.ideas.aha.io/ideas/DIG-I-1075>

Access Control*

Segment access to external contacts and journeys based on divisions.

<https://genesyscloud.ideas.aha.io/ideas/DIG-I-315>

Audits for Custom Fields

Audit administrative changes to custom fields.

<https://genesyscloud.ideas.aha.io/ideas/DIG-I-1072>

Customer Data in Predictive Routing

Route conversations to the best agent based on customer preferences and information.

<https://genesyscloud.ideas.aha.io/ideas/DIG-I-1073>

Contact Merging*

Enrich customer data with the ability to merge related customer profiles and journeys into one.

<https://genesyscloud.ideas.aha.io/ideas/DIG-I-319>

Transcripts for agents in journey

Enable agents to see past transcripts in journey as they communicate with a customer.

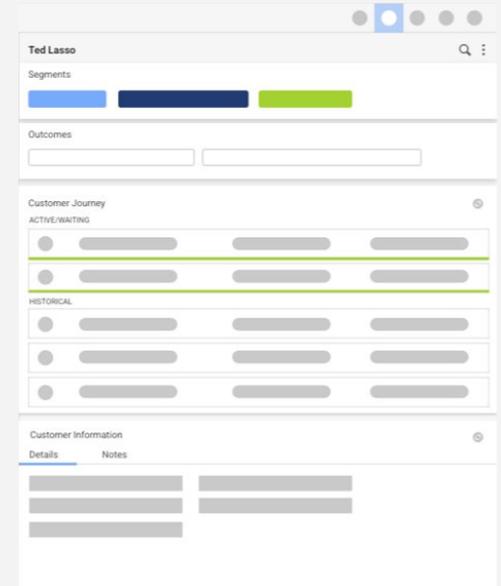
<https://genesyscloud.ideas.aha.io/ideas/DIG-I-1021>

Manual assignment from journey

Enable agents to pick up unanswered interactions.

<https://genesyscloud.ideas.aha.io/ideas/DIG-I-1076>

SINGLE CUSTOMER VIEW WITH SEGMENTS AND OUTCOMES



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 Origin

Methods to generate contacts:

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

Contact type

- **Ephemeral:** cookie identifiers only
- **Identified:** email address/phone number from web form or in a communication
- **Curated:** imported via API, bulk import, created manually

Transition:

Ephemeral and *identified* contacts change to *curated* once a user or API client/integration promotes the contact.

Curated contacts are searchable.

Contact Identifiers

- Phone calls have phone numbers
- Emails have email addresses
- Web visits and web messaging sessions have cookies
- Authenticated web messaging sessions have an External ID, avatar, name and other identifiers
- Social IDs

The foundation for gathering journey data and context

Single Customer View – Identity Resolution

Beta release

The screenshot displays a CRM interface for a customer interaction. At the top, there is a navigation bar with tabs for Activity, Directory, Documents, Performance, Reports, and Admin. A search bar and an 'Off Queue' button are also visible. The main area is divided into three sections: a left sidebar with navigation icons, a central interaction view, and a right sidebar with a search bar and suggestions.

Interactions

- Unknown +16509999999 0:11
- HelpDesk Connected 0:11

Unknown
+1 650 999 9999

USE CASE: UNKNOWN CONTACT REACHING OUT

- Auto-created contact (ephemeral or identified contact) - expires out of system in 60 days including their journey
- Agent can promote to a permanent curated contact (Add to Contacts)
- Agent can merge with existing curated contact (Select Contact)

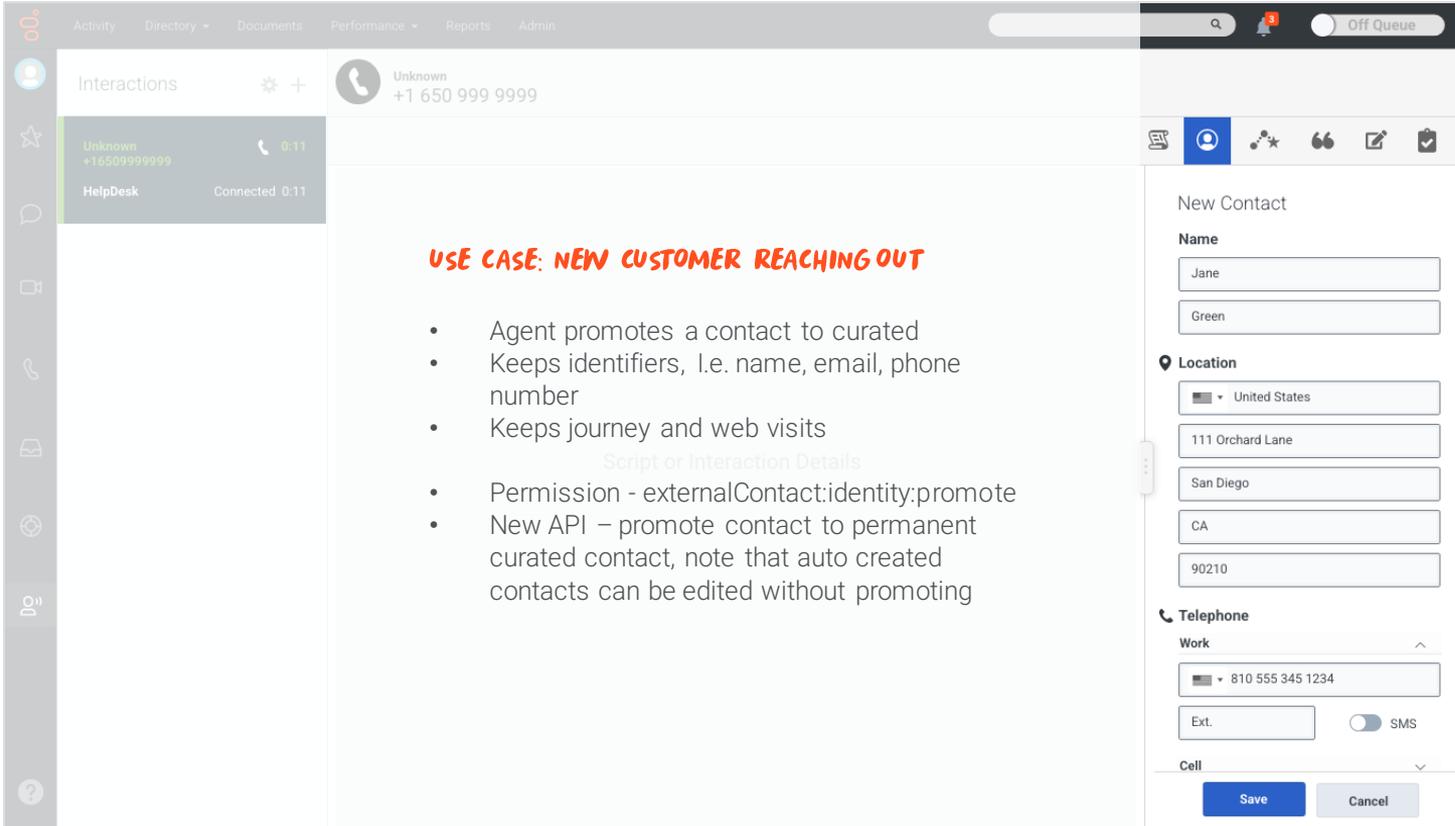
Suggestions:

Unknown
+1 650 999 9999

[Add to Contacts](#)

Single Customer View – Identity Resolution

Beta release



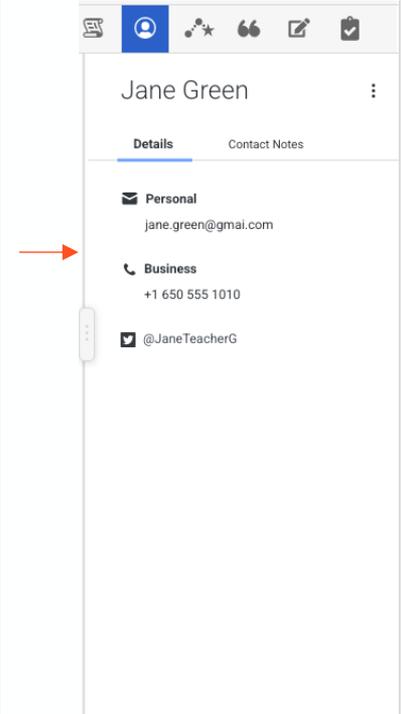
The screenshot shows a customer service interface. On the left, there's a sidebar with navigation icons. The main area is split into two panes. The top pane shows a call log with an entry for 'Unknown +16509999999' with a duration of 0:11. The bottom pane shows a 'New Contact' form with the following fields:

- Name: Jane Green
- Location: United States, 111 Orchard Lane, San Diego, CA, 90210
- Telephone: Work, 810 555 345 1234, Ext. (empty), SMS (checked)

Below the form, there are 'Save' and 'Cancel' buttons.

USE CASE: NEW CUSTOMER REACHING OUT

- Agent promotes a contact to curated
- Keeps identifiers, i.e. name, email, phone number
- Keeps journey and web visits
- *Script or Interaction Details*
- Permission - externalContact:identity:promote
- New API – promote contact to permanent curated contact, note that auto created contacts can be edited without promoting



The screenshot shows a contact profile for 'Jane Green'. The profile is divided into 'Details' and 'Contact Notes' sections. The 'Details' section shows the following information:

- Personal: jane.green@gmail.com
- Business: +1 650 555 1010
- @JaneTeacherG

An orange arrow points from the 'New Contact' form to the 'Jane Green' profile.

Single Customer View – Identity Resolution

Beta release

The screenshot displays a customer support interface for a customer named Joe Smyth. The interface includes a navigation bar at the top with options like Activity, Directory, Documents, Performance, Reports, and Admin. A search bar and an 'On Queue' indicator are also present. The main area shows a conversation history with messages from the customer and the support agent. A list of use cases is overlaid on the conversation, detailing how the system handles customer identity resolution. The right sidebar shows a search bar and two sections: 'Suggestions' and 'Add to existing contacts', both featuring contact information for Joe Smyth and buttons for 'Add to Contacts' and 'Select Contact'.

USE CASES: CUSTOMER CALLING FROM A NEW NUMBER, CUSTOMER REACHING OUT OVER A NEW CHANNEL

- Agent finds existing contact and merges current contact to existing curated contact (Select Contact)
- Provides a single view of the customer across identifiers and channels
- Merges contact identifiers, merges journey and web visits
- Permission - externalContact:identity:merge
- New API for merge – restricted to merging auto-created contact to curated

Note: This replaces the existing associate API for the vast majority of use cases

Single Customer View – Journey



Identifiers



Email Address



Phone Number



Web ID

Channel Stitching



Inbound Call



Outbound Call



Web
Messaging



SMS



Email



Co-browse



Social
Messaging

Customer journey

Status	Message Type	Queue	Agent
Live	Web message	Support	Martha West
Nov 4	Inbound call	Support	Insurance enquiry
Oct 28	Web message	Support	Complaint
Oct 18	Inbound call	Health insurance	Insurance enquiry
Oct 11	Inbound call	Billing	Bill payment
Sep 30	Web message	Billing	Bill correction
Sep 4	Inbound call	Support	Insurance enquiry
Aug 28	Web message	Support	Complaint
Aug 18	Inbound call	Health insurance	Insurance enquiry
Aug 11	Inbound call	Billing	Bill payment
Jul 30	Web message	Billing	Bill correction
Jul 4	Inbound call	Support	Insurance enquiry
Jun 28	Web message	Support	Complaint



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 a user interface for viewing customer journey details. At the top, there is a search bar, a notification bell, and a toggle switch labeled "Off Queue". Below this is a navigation bar with icons for chat, a list, a profile, a star, a quote, a document, and a list. A "Back to journey" link is visible. The main content area shows a "Web message" from Oct 28, 11:27 AM. Below it, under the "Notes" section, three entries are listed: "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." At the bottom, a "Message details" section lists: Queue: Support, Agent: Dennis Burke, Wrap-up: Complaint, Status: Closed, and Duration: 20 min.

GENESYS™

Unauthorized disclosure is prohibited.

Genesys Cloud + Predictive Engagement - Journey



Identifiers



Email Address



Phone Number



Web ID

Channel Stitching



Inbound Call



Outbound Call



Web
Messaging



SMS



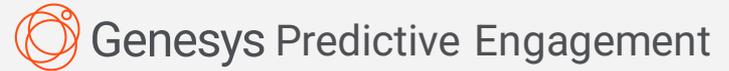
Email



Co-browse



Social
Messaging



Additional Identifier



Web ID

Additional Channel Stitching



Cross Device
Stitching



Web Visit

Additional Context



Segments



Outcome
Predictions



Custom Events
(Optional)

S™

prohibited.

Single Customer View – Journey and Predictive Engagement



Segments



Outcome Predictions



Web Visit



Cross Device Stitching

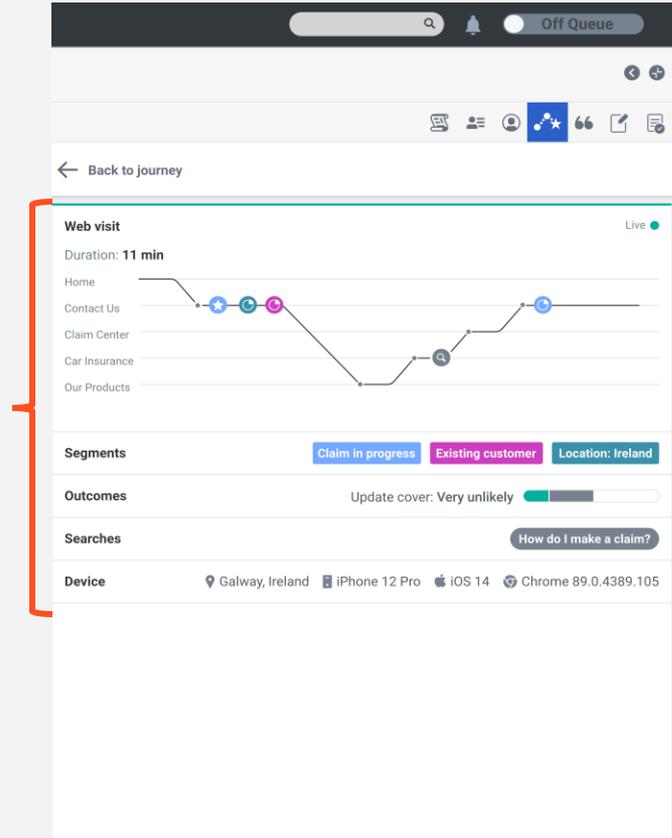
The screenshot displays a customer service interface for a customer named Cara Reynolds. The interface is divided into several sections:

- Activity Bar (Left):** Contains icons for various actions: star (Segments), flask (Outcome Predictions), speech bubble (Interactions), video (Live), document (Web Visit), and a question mark (Cross Device Stitching).
- Interactions (Top Left):** Shows a list of recent interactions with Cara Reynolds, including a support message at 01:23.
- Conversation (Center):** A chat transcript showing the following messages:
 - Cara Reynolds:** "That would be great. Thank you!"
 - Insurance Bot:** "Ok Cara, I'm going to connect you to one of our claims team now. Thanks for getting in touch!"
 - Cara Reynolds:** "Thank you"
 - James Gardener:** "Hello Cara! I hope you're keeping well. It looks like you're in the middle of the claims process. Is that correct?"
 - Cara Reynolds:** "Yes that's correct. I just want to get an update on when the review process will be over."
 - James Gardener:** "That's no problem Cara. I can help you with that. Give me a minute to take a look at your details."
 - Cara Reynolds:** "Okay. Thanks"
 - James Gardener:** "Okay Cara, I can see your details and can tell you that..."
- Customer Journey (Right):** A detailed view of the customer's journey, including:
 - Customer journey:** Overview section.
 - Segments:** "Claim in progress" and "Existing customer".
 - Outcomes:** "Update cover: Very unlikely" with a progress bar.
 - Activity Log (Bottom):** A list of recent activities:
 - Live Web message (Queue: Support, Agent: Martha West)
 - Live Web visit (Current page: Contact Us, Duration: 11 min)
 - Nov 4 Inbound call (Queue: Support, Wrap-up: Insurance enquiry)
 - Oct 28 Web message (Queue: Support, Wrap-up: Complaint)
 - Oct 21 Inbound call (Queue: Billing, Wrap-up: Bill payment)
 - Oct 19 Web visit (Exit page: Contact Us, Duration: 11 min)
 - Oct 18 Inbound call (Queue: Health insurance, Wrap-up: Insurance enquiry)
 - Oct 11 Inbound call (Queue: Billing, Wrap-up: Bill payment)
 - Sep 30 Web message (Queue: Billing, Wrap-up: Bill correction)

Single Customer View – Journey and Web Visits

New styling for the web session journey

Same data points as currently in the Customer Journey tab



Single Customer View – Journey and Custom Events



Web Visit



Cross Device
Stitching



Segments



Outcome
Predictions



Custom Events
(Optional)

The screenshot displays a customer service interface for a customer named Cara Reynolds. The interface is divided into several sections:

- Interactions:** A list of messages from Cara Reynolds and James Gardener. The messages include: "That would be great. Thank you!", "Ok Cara, I'm going to connect you to one of our claims team now. Thanks for getting in touch!", "Thank you", "Hello Cara! I hope you're keeping well. It looks like you're in the middle of the claims process. Is that correct?", "Yes that's correct. I just want to get an update on when the review process will be over.", "That's no problem Cara. I can help you with that. Give me a minute to take a look at your details.", "Okay. Thanks", and "Okay Cara, I can see your details and can tell you that...".
- Customer journey:** A timeline of events for the customer. The events are: "Web message" (Oct 28), "Inbound call" (Nov 4), "Web visit" (Oct 21), "Inbound call" (Oct 19), "Web visit" (Oct 18), "Inbound call" (Oct 11), and "Web message" (Sep 30). Each event includes details such as the queue (e.g., Support, Health insurance, Billing) and the wrap-up (e.g., Insurance enquiry, Bill payment, Bill correction).
- Segments:** A section showing the customer's current segments: "Claim in progress" and "Existing customer".
- Outcomes:** A section showing the customer's current outcomes: "Update cover: Very unlikely" with a progress bar.
- Current Event:** A highlighted event on Oct 21: "Claim #PD28061932" with a status of "In review" and assigned to "Will Smith".

Thank you