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## Introduction

The beta release will enable a customer journey tab on the agent desktop which will show history of select channels e.g. inbound calls, web messaging email with more channels to follow e.g. call backs. General availability is planned for Q3 2022.

The release also includes changes to the profile tab on the agent desktop where agents will be able easily see suggested contacts and have the flexibility to promote these contacts as permanent contact records, or merge them and their journeys with existing permanent contact records.

From an API standpoint, there will now be a contact ID available for every conversation in the system. If taking advantage of contact (and their associated journeys) merging capabilities, the way you call GDPR/CCPA compliance APIs will be updated. If you need to submit a compliance request, you will need to leverage the new APIs that will be provided prior to the start of the beta period.

Beta adopters will have influence on the profile and journey information and the priorities in the roadmap that use the ability to have a single view of the customer for agent desktop enrichment and orchestration capabilities.

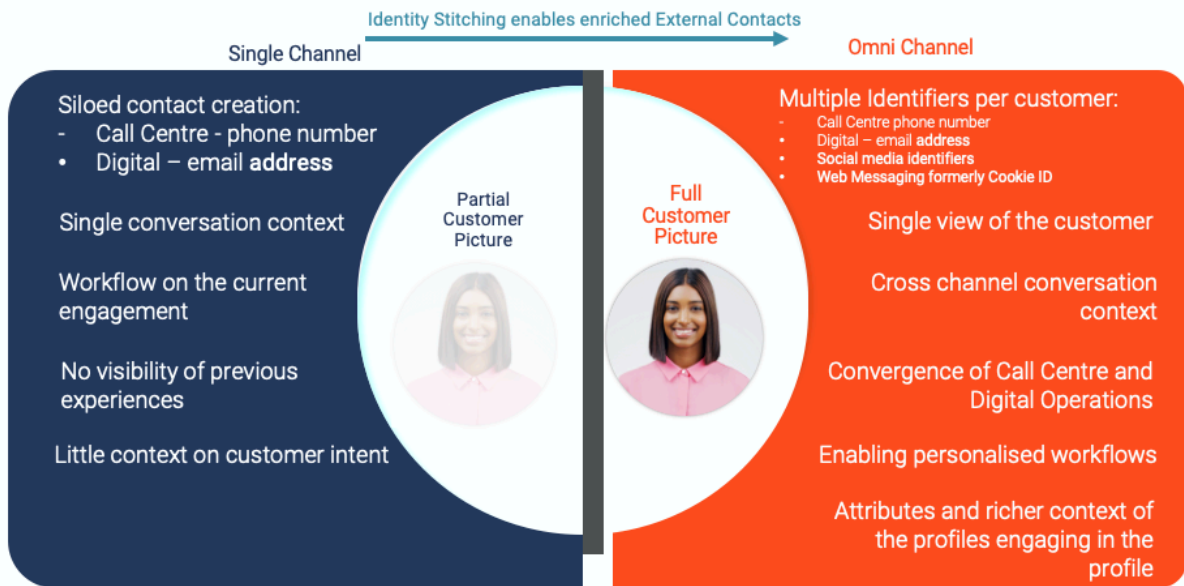
## Key Benefits

No configuration required:

- Omnichannel context to agents.
- Omnichannel analytics.

## What is Identity Resolution?

Foundational - Get the Whole Picture of your Customer!



## Identity Resolution and Customer Journey

### Genesys Cloud – Journey Visualization

Genesys Cloud.

Identifiers

Email Address

Phone Number

Channel Stitching

Inbound Call

Outbound Call

Web Messaging

SMS

Email

Social Messaging

Off Queue

Customer journey

| Live   | Channel      | Queue            | Agent                      |
|--------|--------------|------------------|----------------------------|
| Live   | Web message  | Support          | Martha West                |
| Nov 4  | Inbound call | Support          | Wrap-up: Insurance enquiry |
| Oct 25 | Web message  | Support          | Wrap-up: Complaint         |
| Oct 16 | Inbound call | Health insurance | Wrap-up: Insurance enquiry |
| Oct 11 | Inbound call | Billing          | Wrap-up: Bill payment      |
| Sep 30 | Web message  | Billing          | Wrap-up: Bill correction   |
| Sep 4  | Inbound call | Support          | Wrap-up: Insurance enquiry |
| Aug 28 | Web message  | Support          | Wrap-up: Complaint         |
| Aug 18 | Inbound call | Health insurance | Wrap-up: Insurance enquiry |
| Aug 11 | Inbound call | Billing          | Wrap-up: Bill payment      |
| Jul 30 | Web message  | Billing          | Wrap-up: Bill correction   |
| Jul 4  | Inbound call | Support          | Wrap-up: Insurance enquiry |
| Jun 28 | Web message  | Support          | Wrap-up: Complaint         |

## Steps to Enablement

### Step 1: Creation of Contacts

The beta enables auto creation of contacts on the channels stitched but additional details can be added via third party sources and manual creation.

Creation is through:

1. Auto creation - no configuration required
2. Sync with third party sources
  - a. API ([more info](#))
  - b. Bulk import
3. Manual creation

#### **Auto creation of Contacts for Omnichannel Journey**

New features:

- Ability to merge and promote contacts
- Voice + digital channels

For customers with Predictive Engagement

All features above plus the following will be included:

- Web Visits
- Segments
- Outcomes

Alternative Option: Journey Auto Creation

For customers who don't want to use Contacts.

Features:

- Voice + Web Messaging that are enabled in the journey
- All voice history on one profile
- Single channel only e.g. all conversations on phone number, conversations tied to email address
- Profile panel can be shown or read only option

### Step 2: Permission Changes

Genesys enables this feature for the Org and admin changes permissions for agents to see the journey on the agent desktop. Note that while admin has the ability to

enable the new journey for select agents only, changes to the profile tab in the agent desktop will be enabled for all agents.

It is important to note that the External Contacts and the journey tab are **not** division aware.

Permissions for agents to view and work with contacts:

<https://help.mypurecloud.com/articles/work-external-contact-interaction/>

New permissions:

- Identity merge
- Identity promote

Permissions for agents to view journey:

- Journey > Event > View
- Journey > Eventtype > View
- Journey > Session > View
- Journey > Sessiontype > View
- External Contacts > Session > View

It may be easier to roll out with a select number of agents to have visibility of the journey tab. Set up a new role with these permissions and existing permissions.

### Step 3: Agent desktop training

The agent desktop will have the following conversation history available on these channels:

- Inbound calls (ACD and Business Calls)
- Agent Initiated Outbound - (Email, SMS, Calls)
- Web Messaging
- Web Chat

With Predictive Engagement extra context with web history, segments and outcomes but it is not a requirement for a beta adopter to have this product.

Genesys has documentation of the changes within the profile and the customer journey tab that will be shared. The beta will work best when it is part of the agent process of conversation handling of utilising the customer profile and the customer journey tab to check historical context.

Not Included in current beta:

- Callbacks

- Third party Messaging channels
  - WhatsApp
  - LINE
  - Twitter DM
  - Facebook Messenger
- Voice and Digital Bots
- Knowledge
- Agentless Notifications
- Campaigns

#### Step 4: Agree on roll out date for enabling the feature to agents

The feature will need to be switched on for the Organisation by Genesys. This means that the updated profile UI and a new tab called Customer Journey will be enabled on the platform.

Updated profile UI will be rolled out to all agents. Organisations can select the agents that will have journey tab via permissions. As such, roll out for the journey tab can be on a phased basis to agents.

Note that clicks on the agent desktop will be tracked but all PII data is masked.

#### Step 5: Monitoring success

Hypothesis that enabling the feature will result in a positive impact on the following metrics:

- First Contact Resolution
- Average Handling Time
- Customer NPS
- Employee NPS

Benchmarking these KRAs before enabling the feature will allow us to identify if there is a material impact on these key metrics.

Usage will be monitored through FullStory which masks all PII but will be enabled to assess agent behaviour of how they are using it; dwell time, navigation patterns.

#### Step 6: Beta feedback

To fulfil our objectives, we propose the following plan to illicit feedback pre, during and post beta. The proposed plan is an ideal state. We can be flexible with our plan depending on the availability of Agents and Team Leads.

Some areas for feedback may include:

- The frequency of usage of the profile and customer journey tab
- Usefulness of the tab and information displayed
- Feedback on presentation of the content
- Challenges encountered while/if using the journey tab

## Participants and Methods for Beta feedback:

### Pre-Beta: Survey

1. Survey - To understand feedback of their current experience prior to introducing the beta. This survey will be administered to Agents and Team Leads who will be using the beta. (10 mins to complete)

### During-Beta: Survey and One to One Interview with 3 Agents and 1 Team Lead

1. Survey – This survey will be sent to Agents two weeks after using the beta. This survey is similar to an NPS survey that we will use to understand ease of use along with understanding if this beta experience meets the user's requirements. (>10 mins to complete)
2. One to one feedback session with 3 Agents and 1 Team Lead – 1hr using Zoom/Teams. A UX Researcher will facilitate the session. Some members of the Genesys team may ask some follow up questions.

### Post Beta: Survey

1. Survey – This will be a similar survey to step one and two and will be sent to Agents near the end of the test period. We use this survey to compare results over time. (>10 mins to complete).

## Appendix

### What are Contacts?

Contacts is a directory of customer data including interaction history used for surfacing customer information throughout the platform for context and for personalised orchestration, whether it's within the agent desktop, within architect or bots or within analytics and WEM. With Contacts, an agent can quickly contact a customer by email, phone call, or SMS. During an interaction, an agent builds the interaction history for a client by verifying key contact data. The agent can quickly

see who has interacted with the client and can read about your company's relationship with them.

### Ethical Considerations for Research (Beta Feedback)

- Results are published internally only.
- Performance of any research participant and or confidential business information will not be individually attributable.
- The individual research participant's name will not be documented in notes, recordings, or in the data logging system.
- The individual participant's identifying images (photos, videos) are to be viewed only in the context of the research.
- A playback of the research can be shared with the customer.

### Compliance

If agents are able to merge contacts and their associated journeys, updated privacy DSAR APIs (GDPR, CCPA, etc) will need to be leveraged to ensure compliance.

From a technical standpoint, when two contacts are merged (contact 1 and contact 2), a new third contact is created with a new contact ID (contact 3). In this case, the new contact (contact 3) is considered a canonical contact and points to both original contacts (contact 1 and contact 2). This is done to ensure both consistency of analytics data and to ensure that contacts can be unmerged if needed. At the same time, this implies changes to the privacy DSAR API (GDPR, CCPA, etc) that will be communicated before the start of the beta to ensure compliance continuity.

### Points of Contact

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