

Single Customer View Roadmap Update

Lucie
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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

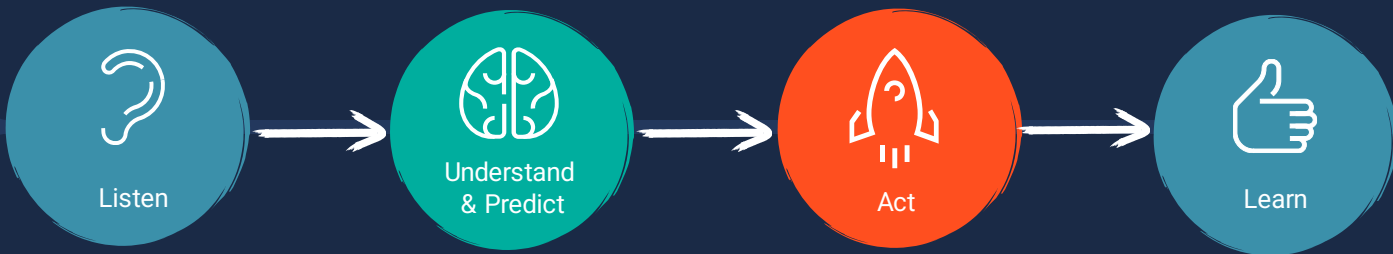
NEW	Identity Resolution	Single Customer View	Contacts & Organizations
PREVIOUS	<ul style="list-style-type: none">• Identity Stitching	<ul style="list-style-type: none">• Unified Customer View• External Contact & Journey• Contact Profile & Journey	<ul style="list-style-type: none">• External Contacts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

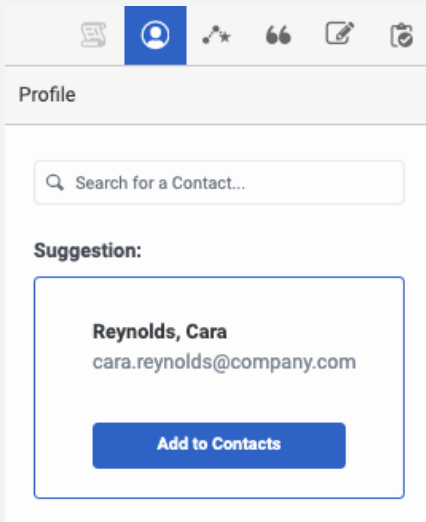
Create true omnichannel and personalized experiences for your customers.

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 web interface for Identity Resolution. At the top is a navigation bar with icons for a laptop, a person, a star, a quote, a pencil, and a clipboard. Below the navigation bar is a 'Profile' section. It contains a search bar with the placeholder text 'Search for a Contact...'. Below the search bar is a 'Suggestion:' section. Inside this section is a box containing the text 'Reynolds, Cara' and 'cara.reynolds@company.com'. At the bottom of this box 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 shows the Genesys interface for agent Cara Reynolds. On the left is a sidebar with navigation icons. The main area is titled 'Cara Reynolds' and shows a list of interactions. The 'Customer Journey' section displays a timeline of events:

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

The interaction list on the left shows messages from an Insurance Bot, Cara Reynolds, and James Gardener, with a 'Type here' input field at the bottom.

The 'Single Customer View' for Cara Reynolds displays the following information:

- 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

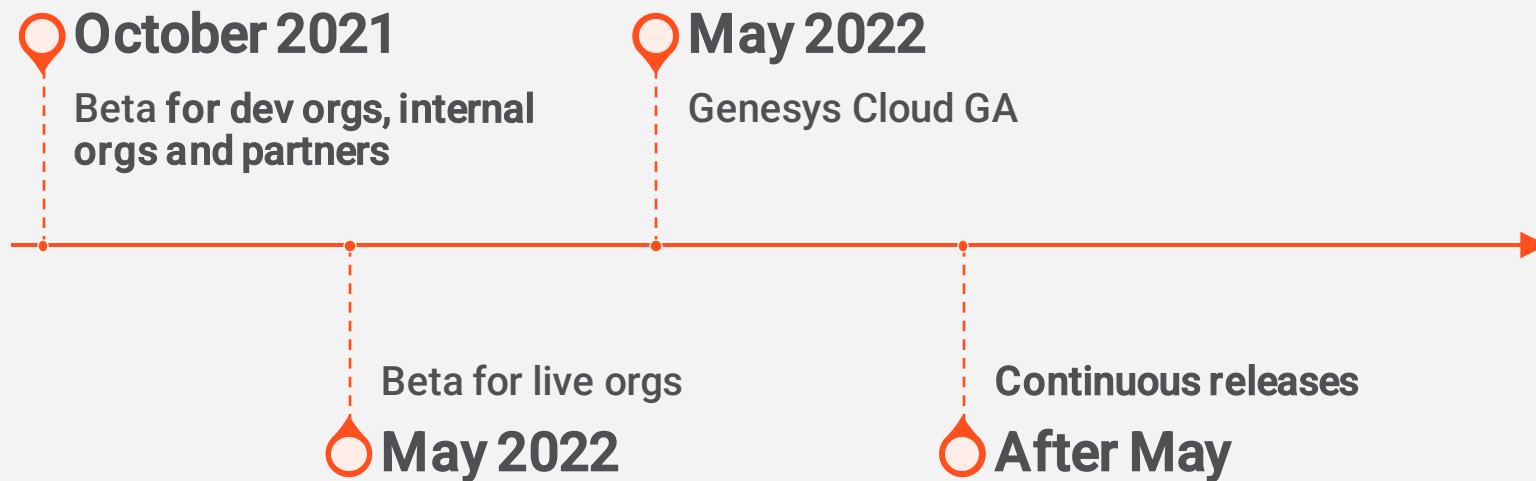
Get additional value with web activity or custom events by leveraging Genesys Predictive Engagement

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.

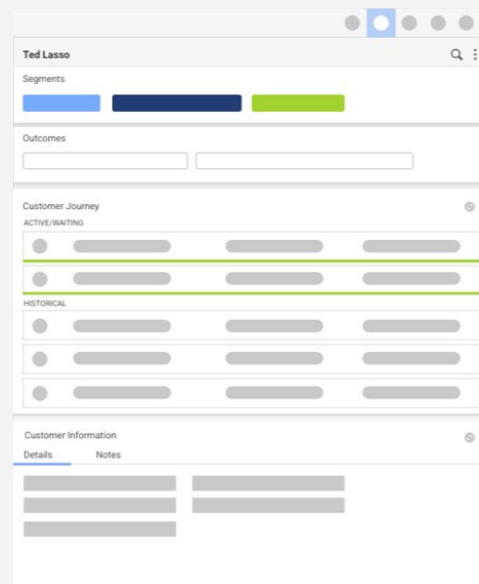
<https://genesyscloud.ideas.aha.io/ideas/DIG-I-1021>

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 with a top navigation bar containing 'Activity', 'Directory', 'Documents', 'Performance', 'Reports', and 'Admin'. A left sidebar features icons for various functions. The main content area is divided into three sections:

- Interactions:** A list of recent interactions. The top entry shows a call from 'Unknown +16509999999' with a duration of 0:11. Below it, a 'HelpDesk' entry is marked as 'Connected 0:11'.
- Customer Profile:** A header section showing a phone icon, the name 'Unknown', and the phone number '+1 650 999 9999'.
- Central Content Area:** Contains the text 'USE CASE: UNKNOWN CONTACT REACHING OUT' in orange, followed by a bulleted list:
 - 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)
- Right Sidebar:** Includes a search bar, a 'Suggestions:' section with a card for 'Unknown +1 650 999 9999' and an 'Add to Contacts' button, and a vertical scroll bar.

Single Customer View – Identity Resolution

Beta release

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

Activity Directory Documents Performance Reports Admin

Interactions

Unknown
+1 650 999 9999

Unknown
+16509999999
HelpDesk
Connected 0:11

New Contact

Name

Jane

Green

Location

United States

111 Orchard Lane

San Diego

CA

90210

Telephone

Work

810 555 345 1234

Ext.

SMS

Cell

Save Cancel

Jane Green

Details Contact Notes

Personal

jane.green@gmail.com

Business

+1 650 555 1010

@JaneTeacherG

Single Customer View – Identity Resolution

Beta release

The screenshot displays a CRM interface for a customer named Joe Smyth. The top navigation bar includes tabs for Activity, Directory, Documents, Performance, Reports, and Admin. The left sidebar contains icons for Interactions, Favorites, Messages, Video, Phone, Bookmarks, Settings, and Help. The main content area shows a conversation history for Joe Smyth, with a message from April 6, 2021, at 9:02 AM. The right-hand panel displays contact details for Joe Smyth, including a Business email (Joe.Smyth@yahoo.com) and a Mobile phone number (+1 650 999 9999). The panel also includes a 'Suggestions' section and an 'Add to existing contacts' section.

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

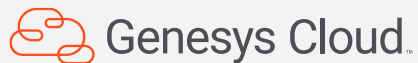
The screenshot displays the 'Journey Details' view for a customer. At the top, there is a dark header with a search bar, a bell icon, and a toggle switch labeled 'Off Queue'. Below this is a toolbar with icons for chat, contacts, a profile, a star (highlighted in blue), a quote, a document, and a list. A 'Back to journey' link is visible. The main content area shows a 'Web message' from 'Oct 28, 11:27 AM'. 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, the 'Message details' section provides a summary: Queue: Support, Agent: Dennis Burke, Wrap-up: Complaint, Status: Closed, and Duration: 20 min.

Message details	
Queue	Support
Agent	Dennis Burke
Wrap-up	Complaint
Status	Closed
Duration	20 min

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Genesys Cloud + Predictive Engagement - Journey



Identifiers



Email Address



Phone Number



Web ID

Channel Stitching



Inbound Call



Outbound Call



Web
Messaging



SMS



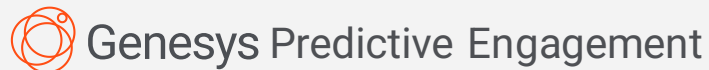
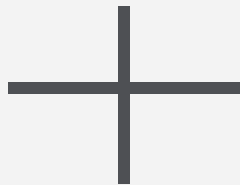
Email



Co-browse



Social
Messaging



Additional Identifier



Web ID

Additional Channel Stitching



Cross Device
Stitching



Web Visit

Additional Context



Segments



Outcome
Predictions



Custom Events
(Optional)

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Single Customer View – Journey and Predictive Engagement



Segments



Outcome Predictions



Web Visit



Cross Device
Stitching

The screenshot displays a customer support interface for 'Cara Reynolds'. The left sidebar contains navigation icons for Segments, Outcome Predictions, Web Visit, and Cross Device Stitching. The main panel shows a chat history with messages from Cara Reynolds, an Insurance Bot, and James Gardener. The right panel provides a detailed view of the customer's journey, including segments, outcomes, and a timeline of interactions.

Customer Journey Details:

- Segments:** Claim in progress, Existing customer
- Outcomes:** Update cover: Very unlikely
- Live:** Web message, Queue: Support, Agent: Martha West
- Web visit:** Current page: Contact Us, Duration: 11 min

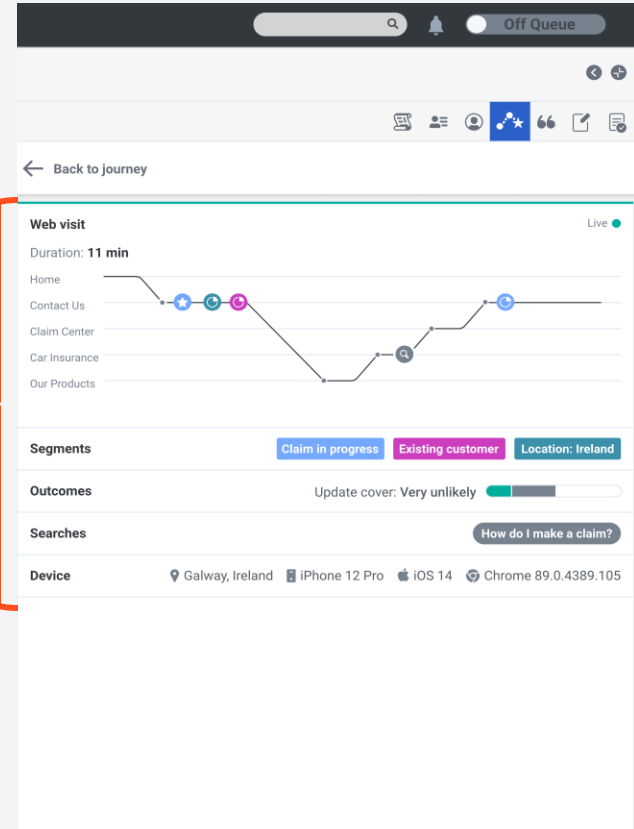
Interaction Timeline:

Date	Interaction Type	Queue	Wrap-up
Nov 4	Inbound call	Support	Insurance enquiry
Oct 28	Web message	Support	Complaint
Oct 21	Inbound call	Billing	Bill payment
Oct 19	Web visit	Contact Us	11 min
Oct 18	Inbound call	Health insurance	Insurance enquiry
Oct 11	Inbound call	Billing	Bill payment
Sep 30	Web message	Billing	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



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Single Customer View – Journey and Custom Events



Web Visit



Cross Device
Stitching



Segments



Outcome
Predictions



Custom Events
(Optional)

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

- Interactions:** A list of recent interactions with the customer, including messages from Cara Reynolds, an Insurance Bot, and James Gardener.
- Customer journey:** A timeline of events showing the customer's path through the support process. The events include:
 - Oct 21: Claim #PD28061932 (In review, Assigned to: Will Smith)
 - 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)
- Segments:** A section showing the customer's current status as 'Claim in progress' and 'Existing customer'.
- Outcomes:** A section showing the customer's current status as 'Update cover: Very unlikely'.

A red box highlights the event 'Oct 21: Claim #PD28061932' in the Customer journey section, and a red arrow points from the 'Custom Events (Optional)' icon to it.

Thank you