WORK AUTOMATION - ROADMAP UPDATE

Chris Bohlin, Product Management
11/01/2023

THE POWER OF US

Key features

WORK AUTOMATION AND TASK ROUTING

- **CAPTURE:** Group all work together
- **MANAGE:** Prioritize & establish business flows
- **AUTOMATE:** Optimize process efficiency through automated workflows
- **DISTRIBUTE:** Distribute to skilled and available resources
- **ANALYZE:** Deliver on SLAs & maintain work-balance

CORE FUNCTIONALITY

CONFIGURATION

- Define workbins & work types
- Apply custom attributes
- Date-based logic
- Visual flow mapper

WORKFLOWS

- Create workflows and transitions
- Define custom business rules
- Execute business logic

PROCESSING

- List view
- Parking support
- Inline editing
- Manual assignment

ROUTING

- Route tasks to agents
- Use standard routing methods
- Native UI integration

GENESYS™

Common use cases across industries

Telecommunication
- Onboarding / activation
- Billing / collection
- Service request management

Finance and banking
- Loan application
- Credit card application

Government
- Traffic fine collection
- Tax collection

Service provider
- Road-side assistance
- Billing disputes

Healthcare
- Appointment management
- Medical waste management

Insurance
- Claim management
- Fraud management

Retail
- Lead detection
- Return logistics management

Utilities
- Billing / collection
- Truck rolls

Custom workflows to drive business processes

WHAT WILL A CUSTOMER DO?

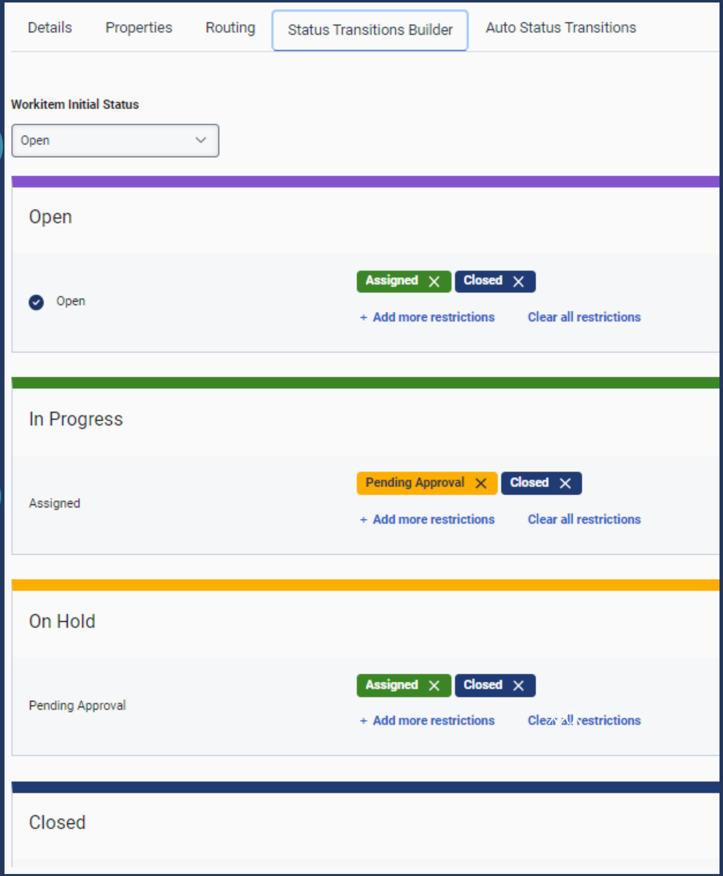
Create comprehensive workflows to manage the lifecycle of tasks

WHAT DOES IT MEAN FOR THE BUSINESS?

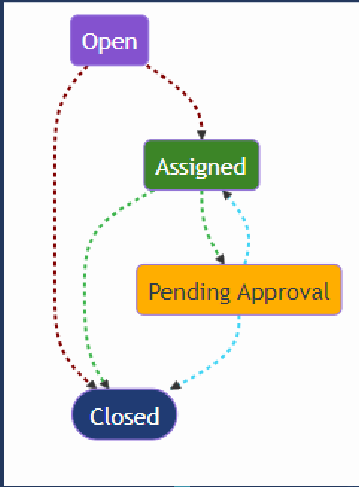
Add automation or route workitems to agents at the right time to deliver the best business results

DRIVE CUSTOM BUSINESS LOGIC THROUGH EACH STATUS CHANGE!

1 Define your starting point



2 Define custom statuses for each step of the process



3 Visualize workflows for easy testing

GENESYS

Provide visibility to all work across the business

WHAT WILL A CUSTOMER DO?
Manage all activity across the customer lifecycle including tasks & communications

WHAT DOES IT MEAN FOR THE BUSINESS?
Gain a clear understanding of all work that transpires in the contact center & back office

ONLY WITH VISIBILITY ACROSS ALL PARTS OF THE BUSINESS WILL THEY BE SUCCESSFUL!

View key attributes including priority values, due_dates, agent assignments to understand what's active and in the backlog

Filter on relevant details like work type, queue or agent

Workitems List
Home | Default Workbin

Get Workbins From: Home
Workbin: Default Workbin

Reset View
Refresh Results

Priority	Due Date	Status	Routing State	Worktype	Name	Queue	Assigned To	Date Created	External Tag	Last Modified
100	10/20/2022	Assigned	Declined	Chris B Workty...	Yusuf Workite...	ChrisBohlin	Chris Bohlin	10/19/2022	None	11/18/2022
100	12/17/2022	Closed	Disconnected	Chris B Workty...	Route to Agen...	ChrisBohlin	Chris Bohlin	12/16/2022	None	12/24/2022
100	10/20/2022	Assigned	Declined	Chris B Workty...	Yusuf Workite...	ChrisBohlin	Chris Bohlin	10/19/2022	None	11/18/2022
100	10/20/2022	Assigned	Disconnected	Chris B Workty...	Yusuf Workitem	ChrisBohlin	Conor Walsh	10/19/2022	None	10/24/2022
100	10/20/2022	Assigned	Disconnected	Chris B Workty...	Yusuf Workitem	ChrisBohlin	Conor Walsh	10/19/2022	None	10/24/2022
100	10/20/2022	Assigned	Disconnected	Chris B Workty...	Yusuf Workitem	ChrisBohlin	Conor Walsh	10/19/2022	None	10/24/2022
100	10/20/2022	Assigned	Disconnected	Chris B Workty...	Yusuf Workite...	ChrisBohlin	Chris Bohlin	10/19/2022	None	11/18/2022
100	10/20/2022	Assigned	Declined	Chris B Workty...	Yusuf Workite...	ChrisBohlin	Chris Bohlin	10/19/2022	None	11/18/2022
100	10/20/2022	Assigned	Disconnected	Chris B Workty...	Yusuf Workitem	ChrisBohlin	Chris Bohlin	10/19/2022	None	10/24/2022
100	10/20/2022	Assigned	Disconnected	Chris B Workty...	Yusuf Workitem	ChrisBohlin	Yusuf Cinar	10/19/2022	None	10/24/2022

1 – 10 of 10

1
2
3

Drill into specific details to view comments, read history, and take actions

GENESYS™

Agent desktop work item view

WHAT WILL A CUSTOMER DO?

Deliver the right information at the right time for agents to complete their work efficiently

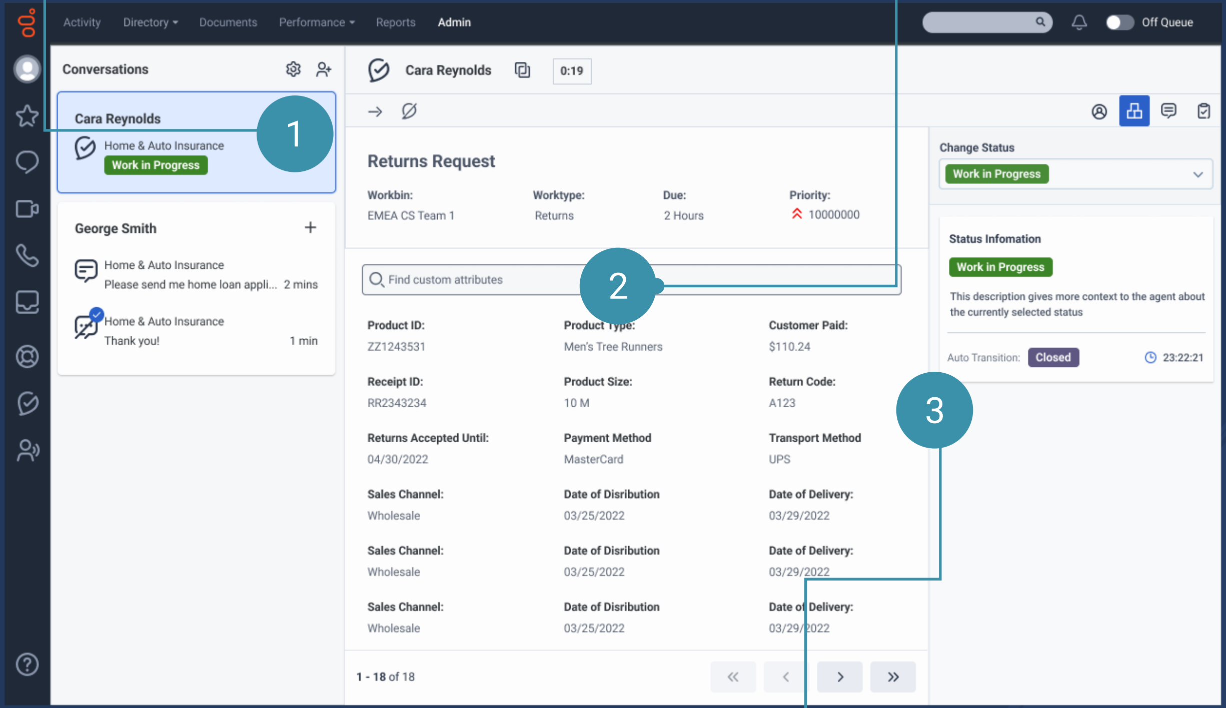
WHAT DOES IT MEAN FOR THE BUSINESS?

Ensure that your agents have the information they need at their fingertips

EQUIP YOUR AGENTS WITH THE RIGHT TOOLS

Each new task is easily identified with the appropriate information and status

Search for important attributes to be able to gain context and complete tasks efficiently



Update the status of a work item to move onto the next action to complete the process successfully.

GENESYS

Schema Builder

WHAT WILL A CUSTOMER DO?

Define attributes to be used for business rules, agent UI, and reporting

WHAT DOES IT MEAN FOR THE BUSINESS?

Leverage attributes to inform users, understand workloads, and drive business process

CUSTOMIZE YOUR DATA TO DRIVE BUSINESS PROCESSES EFFECTIVENESS

Define custom labels for each attribute

Set min and max values for each data entry

Add attributes to define the schema

Search | Filter | Add Custom Attribute | 23/50

Name	Key	Field Type	Description	Min Value	Max Value	Actions
Application Created	application_created_datetime	Date & Time Field	–	–	–	
Application Status	application_status_enum	Dropdown	–	–	–	
Application Status Updated	application_status_updated_datetime	Date & Time Field	–	–	–	
Application Type	application_type_enum	Dropdown	–	–	–	
Civilian Status	civilian_status_checkbox	Checkbox (Boolean)	–	–	–	
Days	days_integer	Integer	–	0 Count	1,000 Count	
Email Address	email_address_text	Small Text Field	–	0 Characters	100 Characters	
Email Holdout Strategy	email_holdout_strategy_enum	Dropdown	–	–	–	
Engagement Level	engagement_level_enum	Dropdown	–	–	–	
First Name	first_name_text	Small Text Field	–	0 Characters	100	
IRN	irn_identifier	Identifier	–	0 Characters	100	
Last Name	last_name_text	Small Text Field	–	0 Characters	100 Characters	
Lead Source	lead_source_enum	Dropdown	INET ACRF REFR ALUM RTY	–	–	
Lead State	lead_state_enum	Dropdown	–	–	–	

Select from predefined attribute types

GENESYS

Triggers User Interface

WHAT WILL A CUSTOMER DO?

Listen for all CRUD actions and take immediate action

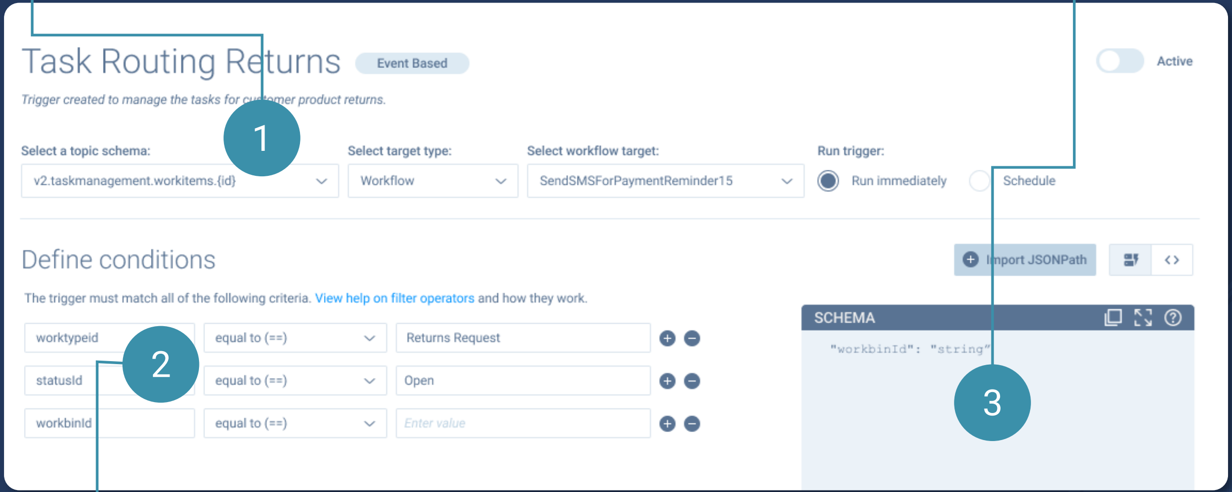
WHAT DOES IT MEAN FOR THE BUSINESS?

Execute business logic at the appropriate time to update backend systems, make additional communications, or start other processes

REACT TO EVERY CHANGE AS SOON AS IT OCCURS

Listen for specific workitem notifications

Paste in JSON path for easy creation



Look for specific matching criteria to trigger a workflow in architect

TASK AUTOMATION & ROUTING: NEXT ADVANCE IN AUTOMATION

DELIVERED — Q3

Triggers UI
Build listeners to execute business logic (via architect) whenever a workitem is added or modified

List View – Advanced Filtering
Apply filters across worktypes, queues, assigneeID, and more

IN PROGRESS — Q4

Bulk Updates
Support for Bulk Create and Bulk Terminate

WorkItem Flows
Admins will be able to build specific 'workitem flows in architect deducing needs for data actions and API use

Agent UI Support
Features includes transfer, park, disconnect, update status, wrap-up, comments, view attributes & more

Performance Views
View workitem data at both a queue and agent levels to understand work volumes, handle, and focus metrics

SLA Definition & Reporting
Manage workitem service levels for the life of the task (SLA = % of workitems completed by due_date)

Forecasting & Scheduling
Understand *all* work users across the org handle to accurately forecast and staff appropriately

Relationships & Dependencies
API support to link conversations & workitems

1Q24

Agent UI Auto-answer
Increase agent efficiency by automatically answering/connecting workitems in the agent's roster

Date Automation APIs
Pre and post-date business logic support for dynamic prioritization, due_date alerts, etc.

Scriptor Support
Present agents with custom scripts when connected to workitems

Embedded Framework
Basic Answer support for embedded framework integrations

Analytics Workload View
View daily/weekly volumes of upcoming or past due tasks at workbin, worktype, or queue levels

TARGET — FUTURE

QM Evaluations and Policies
Generate automated reviews of workitems delivered to agents alongside existing evaluations.

Screen Recording
Record screen activity of agents when connecting to workitems

Generic Rules Builder UI
Enable multiple data points to capture intent and return relevant data to best manage workitems

Bespoke Integrations
CRM: SFDC, ServiceNow, SAP
RPA: Automation Anywhere
Partner: Eccentex, Appian

Identity Stitching
Tie conversations & tasks to external contact data to deliver full customer journey information

Bulk Updates (cont.)
Support for Bulk update including priority, due_date, assignee