

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.

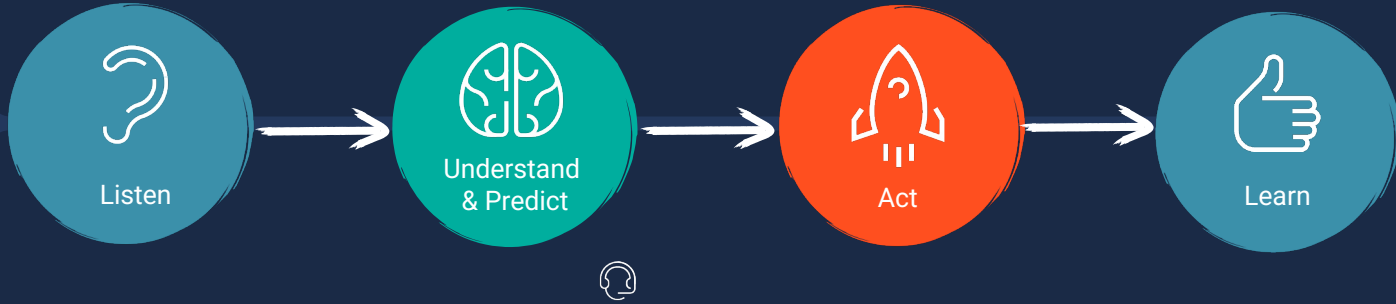
- * Moving from singular interaction to omnichannel
- * It's a feature enhancement of External Contacts that is foundational for conversations across all channels to be synced together in a unified Single Customer View.

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 in back end for every interaction but **Org has control** over contacts that are saved to Directory

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

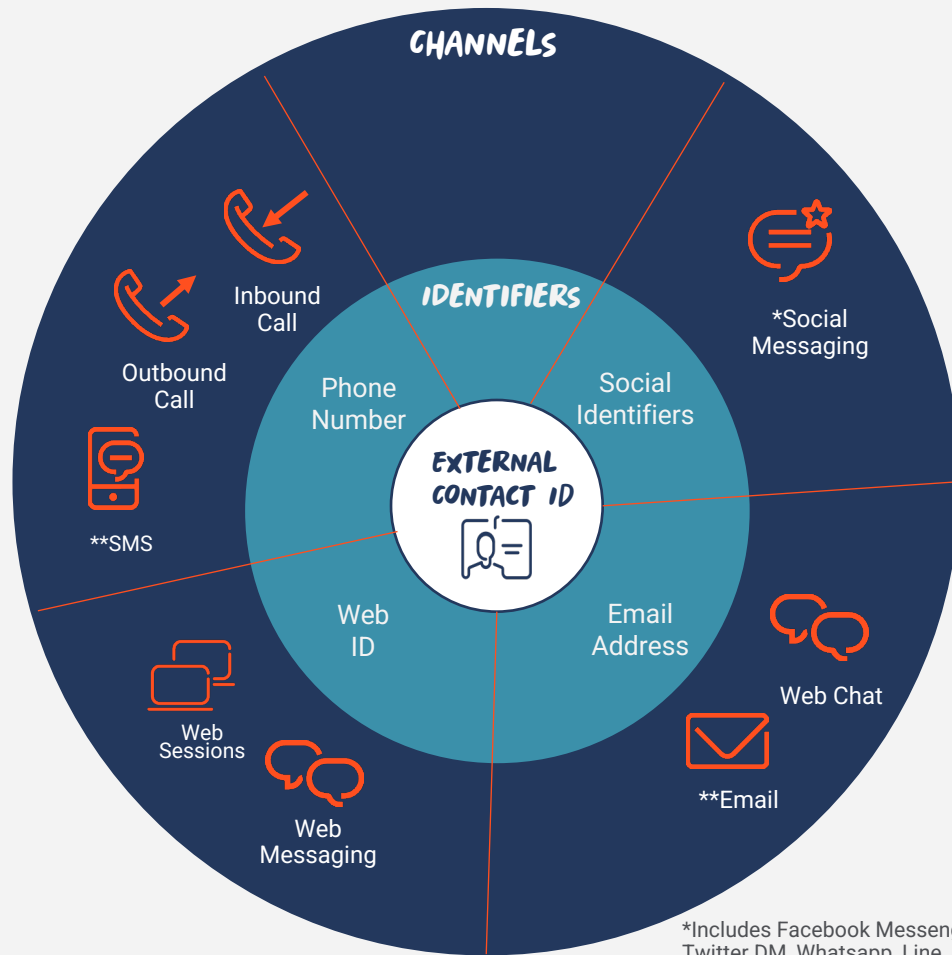
- Routing – predictive routing
- Bots
- Journey – Pointillist



PHASE 1 ON CORE CHANNELS WITH CORE IDENTIFIERS

- * A contact has many identifiers.
- * An External Contact ID attaches to each conversation
- * Channels are all the voice and digital channels that Genesys can track
- * Each conversation on a channel can be saved to that contact for 60 days

EXTERNAL
CONTACT ID



*Includes Facebook Messenger, Twitter DM, Whatsapp, Line

**Includes agent led and agentless notifications

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)

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- * **External contacts > Session > View** (to allow admins to enable the journey tab)
- * **External contacts > Session > All permissions**

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). These are searchable under Directory.

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

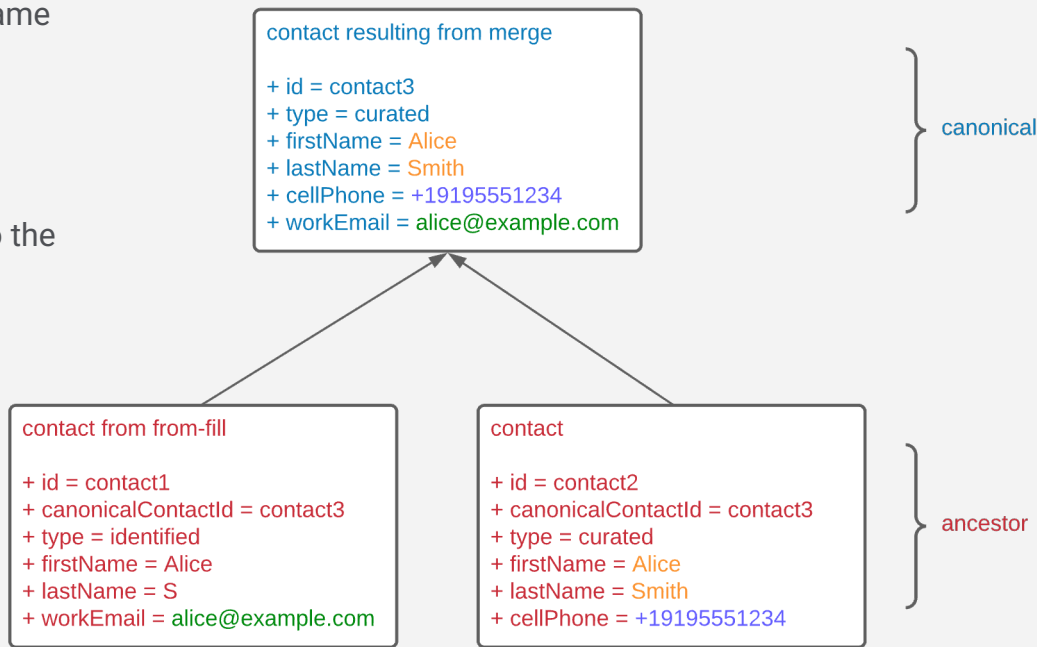
- * Join things from both contacts

— Attributes

— Identifiers / PII

— Notes

— Journeys



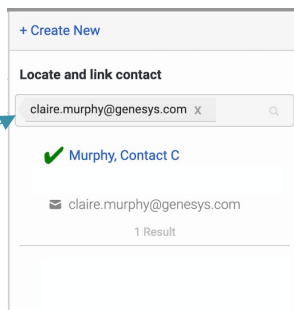
Agent Views



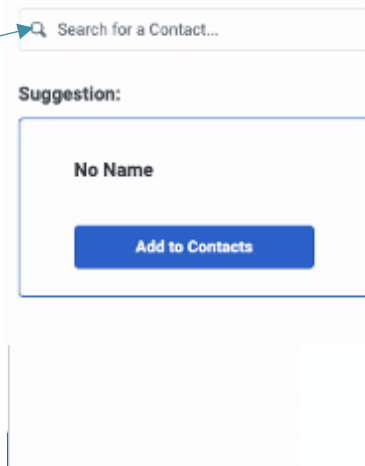
WHAT IS CHANGING ON AGENT DESKTOP?

New Contact Changes

Old Version:
Auto populates
in the search box

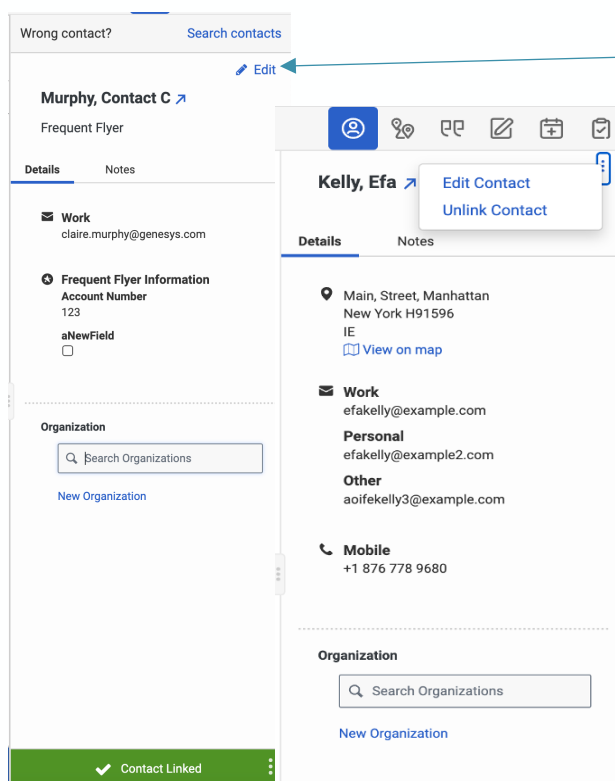


New Version:
Agent manually
searches by in
the search box
e.g. email,
contact number,
first name, last
name etc.



Editing Contact Changes

Old Version:
Edit hyperlink



**New Profile Tab
View**

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

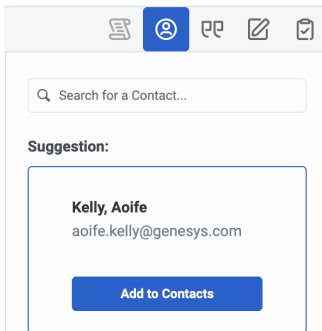
Example if Claire
rings in on Efa's
phone and the
agent knows this
from the call the
agent can unlink
the conversation
from Efa's profile.

PROFILE TAB CHANGE

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

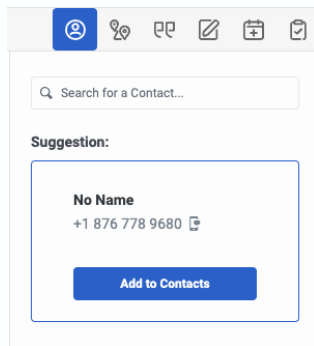
Example 1

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.



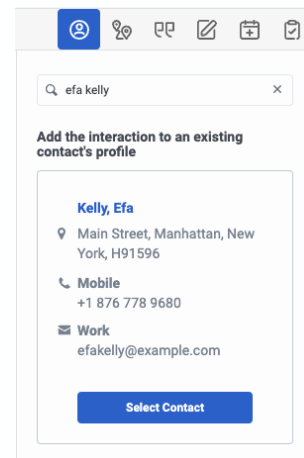
Option 1

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

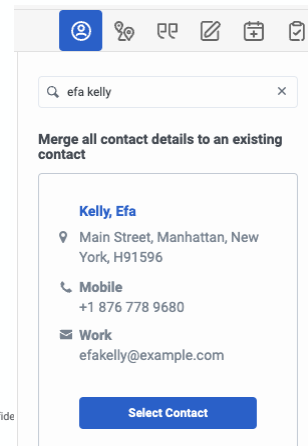
The interaction is added to Journey so interactions from the last 60 days can be seen on the journey tab.



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

Requires permissions to enable this journey tab (See Slide 7)

The screenshot displays a customer service interface. On the left, a sidebar contains navigation icons. The main area shows a conversation with 'Cara Reynolds' dated 'Tue, May 3, 2022 9:17 AM'. The conversation history includes:

- 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)

On the right, a 'Journey' tab is active, showing a list of interactions. A red arrow points to the 'Journey' icon in the top right toolbar. The journey list includes:

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

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

Reynolds, Cara

Support

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

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...

Segments

Auto Insurance Home Insurance Onboarding

View more (+7)

Outcomes

Onboarding Likely Health INS Unlikely

View more (+5)

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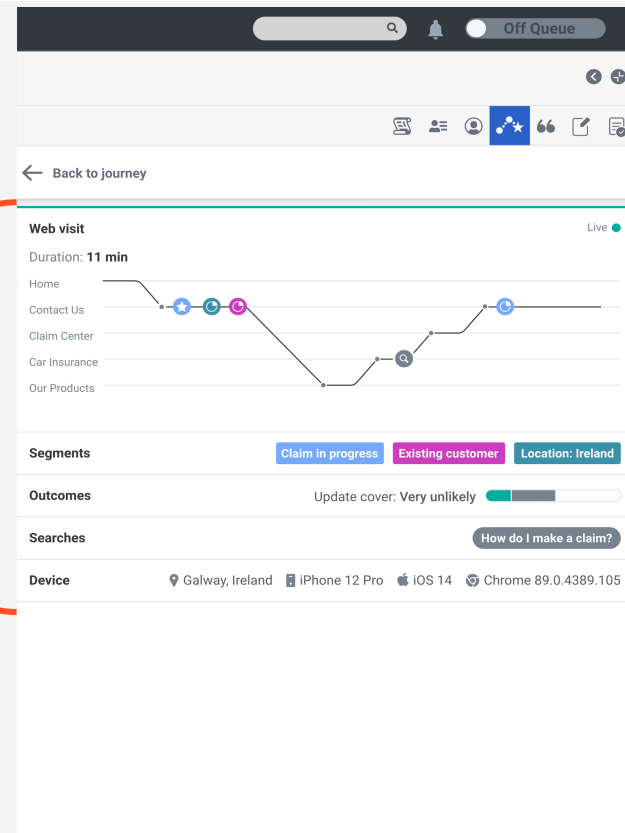
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SINGLE CUSTOMER VIEW - JOURNEY AND WEB VISITS WITH PREDICTIVE ENGAGEMENT

New styling for the web session journey

Same data points as currently in the Customer Journey tab



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SALESFORCE VIEW OF JOURNEY GADGET WITH PREDICTIVE ENGAGEMENT

- * Profile tab does not appear in Salesforce.
- * Merging, adding and unlinking interactions can only happen in Genesys Cloud

The screenshot displays the Salesforce interface for a Journey Gadget. At the top, the 'g-sol' logo and navigation menu are visible. The main header shows the task name 'Aolife Kelly' and the date/time '20/09/2022, 12:06:53'. The 'Details' tab is selected, showing task information and a list of segments. The 'Outcomes' section indicates a 'Big spender: Likely' status. The 'Live' section shows a 'Web message' with details like 'Queue: Region EMEA - Sa...', 'Agent: Aolife Kelly', and 'Status: Active'. Below this, a list of interactions is shown, including 'Inbound call' and 'Web visit' with details like 'Current page: GSol', 'Duration: 4 min', and 'Page views: 7'.

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

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