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Contact Center Manager Training Guide

Genesys Cloud

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Section 1 | Genesys Cloud Overview

PureCloud is a cloud-based all-in-one platform designed to meet the continuously changing needs of the organization and its contact center. PureCloud services are offered for any sized organization that requires unified communication and collaboration.

PureCloud is a suite of cloud-based services and applications built upon Amazon Web Services (AWS) that provides secure access to the organization across the world. The whole PureCloud environment is a collection of microservices that run simultaneously and are delivered to the customer via the internet. The PureCloud components are organized as follows:

1. PureCloud Collaborate

2. PureCloud Communicate

3. PureCloud Contact Center
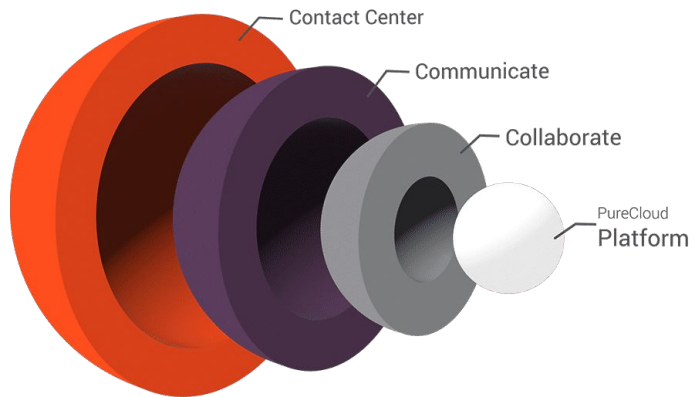
PureCloud Collaborate

PureCloud Collaborate is a social media app that helps users collaborate within the organization. Collaborate also serves as a directory that contains user details, such as name, education, hobbies, skills, physical location, and department, for an organization.

PureCloud Communicate

PureCloud Communicate has all the features of PureCloud Collaborate and provides the users in the organization with telephony capabilities. Users can use a SIP phone or WebRTC-based PureCloud phone for dialing and receiving calls.

PureCloud Contact Center

PureCloud contact center offers the customer an *out of the box* all-in-one contact center solution for customer engagement through multi-communication channels, such as voice, fax, email, web chat, Short Message Service (SMS), social media, and callbacks. PureCloud Collaborate and PureCloud Communicate provide the organization with a fully unified communication system and make up the foundation of the contact center. The features of the Contact Center are the following:

1. Automated Call Distribution (ACD)
2. Real-time and historical reports
3. Options to integrate Customer Relationship Management (CRM) software like Salesforce or Zendesk, or generally to HTTP REST services
4. Supervising tools for Quality Management and Workforce Management

Who uses the features of Collaborate, Communicate, and Contact Center?	
Collaborate/Communicate	**Contact Center**
Every member of the organization, regardless of their role, uses the Collaborate features. Those requiring telephony services use the Communicate features.	Staff responsible for customer engagement have access to additional features specifically related to contact center communications. Roles who have contact center communications responsibilities include the following: ● Contact Center Agents ● Supervisors ● Telephony Administrators ● Super Administrators

1.2 Introduction to PureCloud Collaborate

A company that is spread across multiple locations needs a unified communication system to work efficiently. Generally, every organization needs a single application with utilities that meet the contact center's requirements for customer interactions as well as for communication among team members.

PureCloud Collaborate supports unified collaboration. It enables communication among people and teams within the organization and serves as a user directory.

The following are the advantages of unified collaboration within a large organization:

- Instant communication with the coworkers enables you to accomplish complex tasks in a short time. Therefore, the productivity and performance of the organization is enhanced.
- Instant messaging costs are significantly less than long-distance phone conversations.
- Unified collaboration brings different teams together easily under one umbrella like a chat room.
- Integrating social networking applications like Twitter into the organization naturally makes the customer's connection to the organization more accessible.

PureCloud Chat	Using this feature, users instantly communicate with each other across the organization via text or video. The chat history is maintained for future reference.
Profiles	PureCloud is used as a user directory for the organization. User profiles contain user information such as Name, location, personal contact number, groups they belong to, level of education, skills and relationships (hierarchy in the organization). The data in the profile can be used as keywords for advanced searches and for creating groups.
Groups	PureCloud Groups are communities within the organization, made up of users with common attributes, such as common skills, relationships, location, or another commonality. Groups can be public or private with restricted access. If the group visibility is set for public, every member of your organization can view the group chatroom and members. Also, you can assign a phone number to groups. We will discuss assigning phone numbers to groups in the Communicate section.
Documents	Any type of file can be stored and managed within PureCloud. You can upload and view files in the Documents tab on the home page. The maximum size limit for a file to upload is 2 Gigabytes (GB). Files can either be visible only to you, or to members of a group.

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PureCloud Contact Center	
Agent Interface	Agent interface is where a contact center agent performs their work, including toggling on/off queue status, handling ACD interactions, viewing their performance dashboard, and using call scripts.
IVR (Architect)	PureCloud Architect allows you to perform actions such as building menus for inbound calls and emails, creating secure call flows to gather sensitive caller data, modifying prompts, configuring speech recognition, and playing back values from external data sources.
Integrations	PureCloud supports multiple types of integrations including embedded clients for Salesforce and Zendesk, data actions to pull data from third party systems, Verint WFM, and Salesforce External Contacts.
Contact Center Management	Supervisors/Managers/Administrators can manage the contact center by performing systems configurations, such as creating and managing ACD queues, agent activation/deactivation, routing and scheduling, and monitoring.
WFM	Workforce managers can use PureCloud to perform tasks including setting up the activity codes, management units, and work plans used for scheduling, working with short-term forecasts, managing time off requests, creating and modifying agents schedules, and monitoring agent adherence to schedules.
ACD	With PureCloud ACD, you can configure settings including the evaluation and routing method to use for routing interactions, skills-based routing, email routing, social media listeners for routing social expressions, and routing of SMS, Twitter, Facebook, and other messages.
Quality Management	Quality administrators can perform tasks including monitoring evaluation activity, creating evaluation forms used to score recordings and agent performance, creating quality policies to manage recording and evaluation of interactions, and recording agent screens during interactions.
Reports, Dashboards, & Views	Historical reports, dashboards with real-time data, and dynamic views allow supervisors and managers to monitor queue performance and view useful statistics for managing queues and agents.

PureCloud Contact Center	
Outbound Campaigns	Outbound dialing settings including dialing modes, contact lists, do-not-call lists, allowable calling times by time zone, rules to automate campaign actions for specified conditions, and actions to take based upon call analysis.
Scripts	Using the scripting feature, you can configure scripts for inbound interactions, outbound calls, and multi-page scripts with embedded actions. Scripts also provide the ability to exchange data with a REST-based web service and perform a screen pop with data sent from and Architect call flow or a script integration.

## 1.3 The Purpose of PureCloud Architect in a Contact Center

PureCloud Architect is a drag-and-drop web-based design tool used to create the menus that a customer hears when calling your company. The menus guide the customer through the available options—speak to a specific employee, listen to a bank account balance, make a payment, place an order, speak with a customer service representative, or maybe just reach the operator.

Collectively, the menus are called an IVR. A well-designed IVR presents choices clearly, helping the customer get the right assistance as quickly as possible. The goal of IVR is to reduce customer effort while increasing service efficiency. Industry best practices for IVR design include:

- Put the most popular options first in the menus.
- Don't have the caller confirm every entry—just the most important ones, such as a callback phone number.
- Ensure prompts are brief and lead with the information, followed by a number to press, for example, "*for customer service, press one"* rather than, "*press one for customer service.*"
- Have four or fewer options in each menu and three or fewer menus prior to the caller reaching the desired service.
- Allow the caller to barge in by pressing an option while the prompt is playing.
- Always give the caller the option to reach a live person.

Flows

PureCloud Architect organizes IVR functionality into flows. The following example is a basic Inbound Call flow for a company's main menu during business hours:
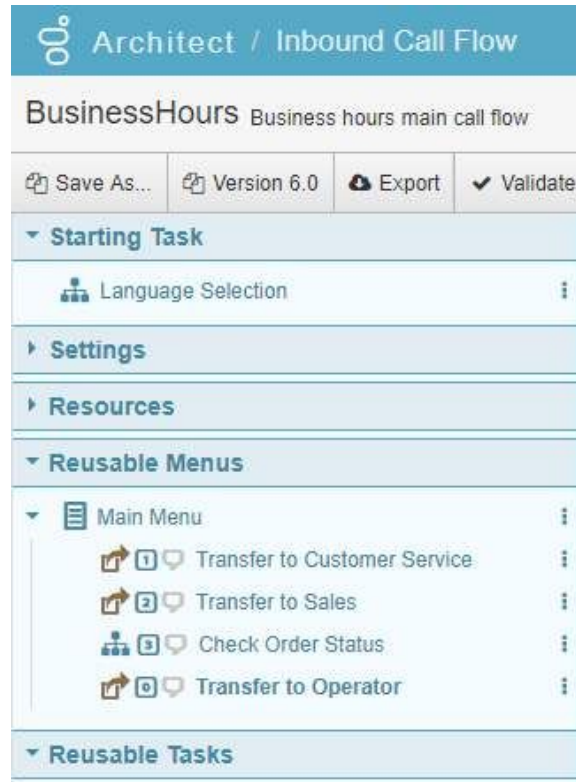
There are several types of flows, each designed to handle a different aspect of IVR functionality or interaction routing. This example is very basic with just four options.

PureCloud Architect supports seven types of flows:
- Inbound Call
- In-Queue Call
- Outbound Call
- Secure Call
- Inbound Email
- Inbound Message
- Survey Invite

In this course, we discuss one type of flow, the inbound call flow. The other flow types are covered in more detail in the Advanced Architect course.

1.4 Scripting in PureCloud Contact Center

The main purpose of a script in a contact center is to provide an agent with on-screen instructions and customer information. The on-screen instructions often contain precise words to use when interacting with a customer. Scripts are presented to the agents as a screen pop within the Client UI. Scripts include a combination of visual controls, text, graphics and navigational aids.

You can assign Scripts for use with inbound interactions, such as calls, callbacks, emails, and messages, and for outbound dialing campaigns. Inbound interactions usually have the script assigned in an Architect flow, whereas outbound scripts are assigned in the Campaign Management settings under the **Admin** menu.

A typical script includes several details and spans multiple pages, however, you can also create single page scripts in the form of a questionnaire, a survey, or a feedback form. Using scripts in the contact center optimizes the efficiency and effectiveness of customer interactions. In this course, we introduce the concepts of scripting and create one basic script for outbound dialing.

Scenario of a Callback

Your company sells outdoor adventures packages via your website. Customers can finance their purchase through your company and often call in to make a payment. Callers are given the option to receive a callback instead of waiting on hold in the queue.

To assist the agents when they place the callback, a simple script pops up displaying the name of the caller based on the ANI and Calling Party Name associated with the original call, the phone number, and the amount owed on the account.

The script has optional text in the form of **[Name]/Someone** because sometimes there is no Calling Party Name associated with the call and PureCloud substitutes Calling Party Name with the location the person is calling from.

1.5 Overview of Outbound Dialer

Companies place outbound calls for various reasons, including non-profit fundraising, political advertising, debt collection, cold call sales, automated surveys, and appointment reminders. PureCloud Outbound Dialer delivers coordinated outreach across multiple channels, both automated and agent-assisted, and creates optimal engagements based on the agent's availability.

PureCloud outbound dialing configurations can be very simple or much more complex. This course introduces basic configuration concepts. The PureCloud Outbound Dialing specialization course covers more complex configurations.
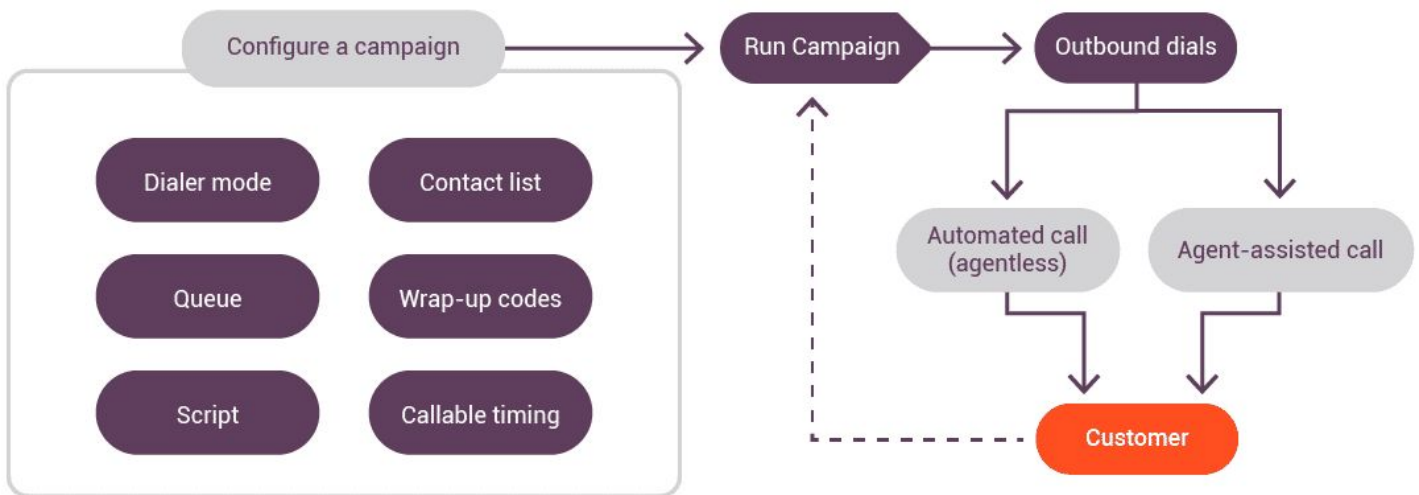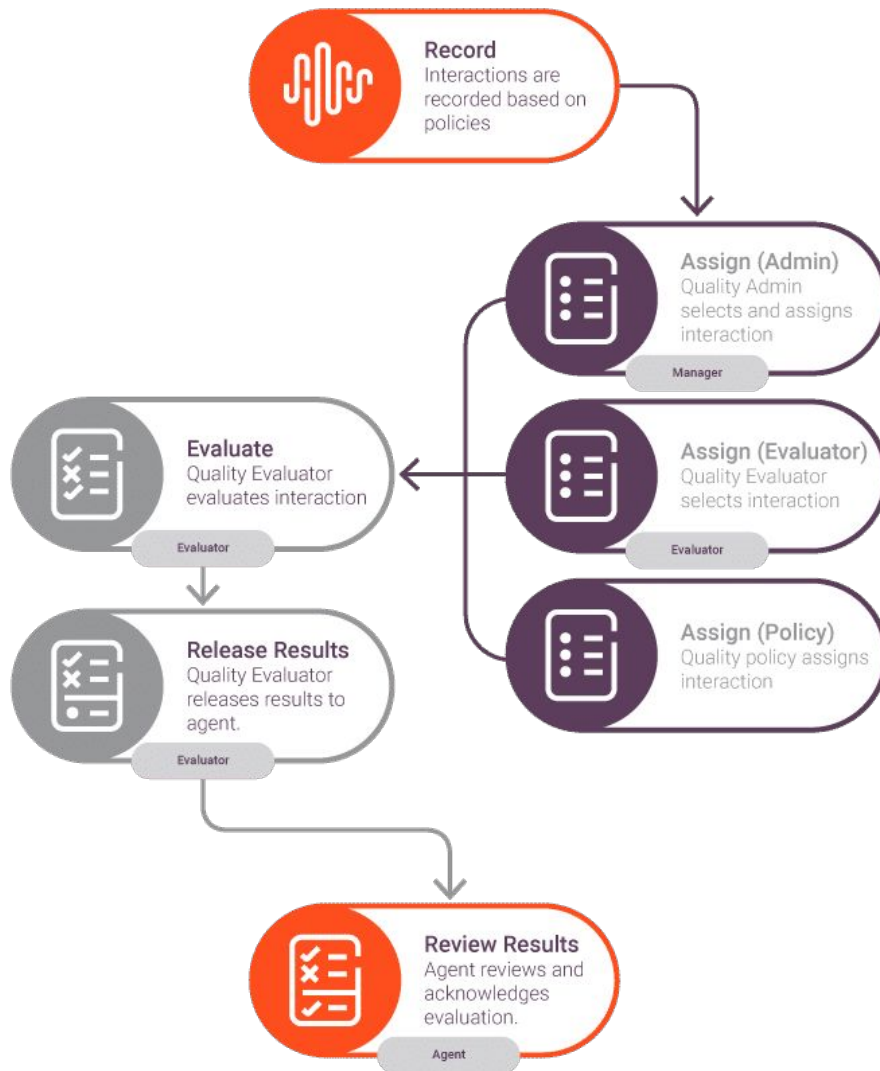

1.6 Quality Management in the Contact Center

Quality Management, also known as customer experience management, is the practice of making sure that contact center agents provide customers with the best possible experience when they interact with your company. Quality management is vital to your contact center because customers decide whether to continue doing business with you or switch to the competition, based on how they feel after interacting with one of your agents. Customers are quick to tell everyone they know when they've had a bad experience. They are also happy to recommend businesses that make them feel cared for and appreciated.

Contact center managers and supervisors use various tools to manage quality. They listen to call recordings, monitor conversations, review chats and emails, and give agents feedback using written evaluations. Companies establish policies regarding which interactions get recorded and reviewed. Most companies retain recordings for months if not years after the interaction takes place. Supervisors monitor performance statistics such as service level, average handle time, after call work, and other KPIs hoping to spot and work through problems quickly and efficiently.
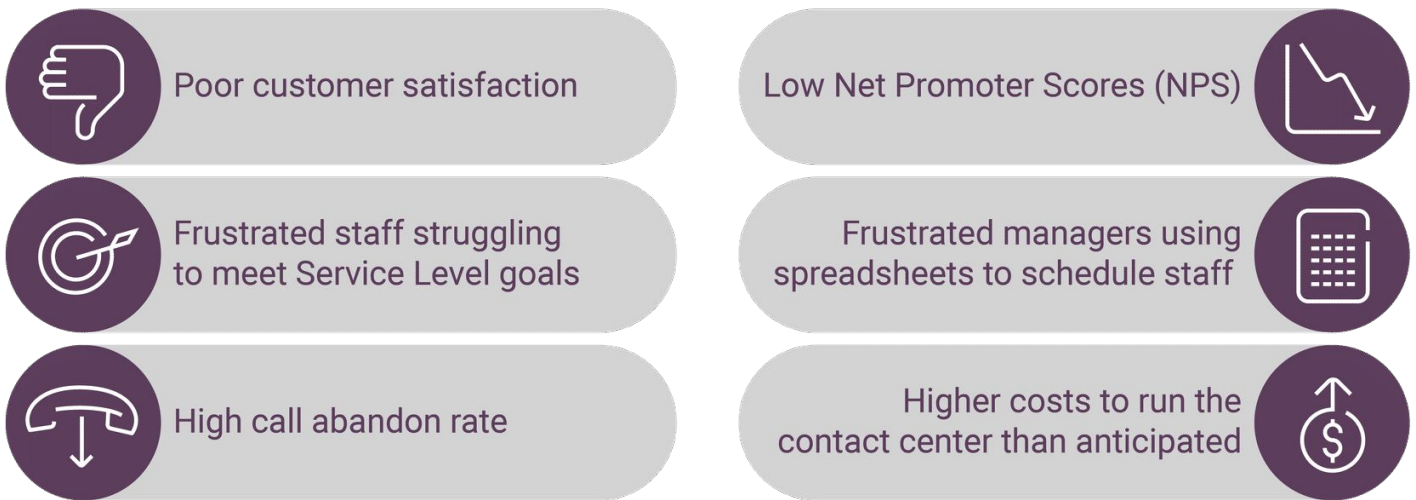
PureCloud Contact Center has multiple tools used for quality management: recording policies, evaluation forms, performance dashboards with dynamic views of statistics, call monitoring and historical reports. All these capabilities help a contact center run smoothly, providing the best possible customer experience. This course provides an overview of the Quality Management features in PureCloud. The Quality Management specialization course covers these topics and more in detail.

1.7 Workforce Management in The Contact Center

Workforce management (WFM) is the process of strategically optimizing the productivity of employees to ensure that all resources are in the right place at the right time. A workforce management strategy typically includes scheduling, forecasting, skills management, timekeeping and attendance, intraday management, and employee empowerment.

The following are indications of a contact center whose workforce is **not** being managed well:

Poor customer satisfaction	Low Net Promoter Scores (NPS)
Frustrated staff struggling to meet Service Level goals	Frustrated managers using spreadsheets to schedule staff
High call abandon rate	Higher costs to run the contact center than anticipated

PureCloud's workforce management features simplify the process of forecasting interactions and scheduling agents in multi-channel contact centers. These features help you optimize work performance to achieve your organization's operational goals. With workforce management, you can:
- Develop short-term forecasts.
- Evaluate intraday differences between forecast and actual values.
- Create and manage schedules.
- Perform load-based schedule generation.
- Monitor adherence to schedules.
- Show agents their schedules.
- Manage time-off requests.

Your organization's Workforce Management feature set depends on the level of your PureCloud subscription.

Section 2 | Working Together

2.1 Using the Directory

Each organization using Genesys Cloud has a profile directory. The directory typically includes user's contact information, organizational relationships, office location, groups, education, skills, and more. Profile data become keywords, which can be used in advanced searches. So, when it's time to collaborate or find someone who has a specific skill or certification, finding that person is easy.

In this section, we'll show you how easy using the directory can be.
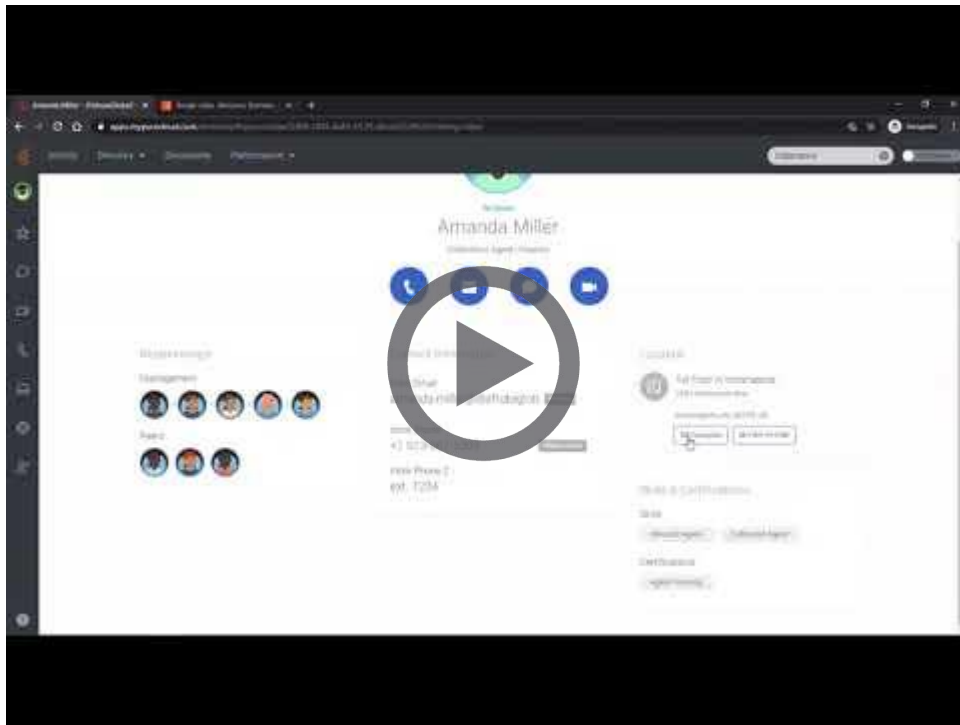
Case Study

You work in the customer service group. You receive a call from a customer who wants to check on their credit application. Usually, you transfer these types of questions to Jim because he is always so helpful, but he is on vacation. You use the directory to search for another person who works in the credit department and see that Angela is available. You then transfer the customer to Angela who provides the requested information.

2.2 Agent Assistance

Inevitably there is a situation when an agent needs help from someone who has the authority to make any customer request possible. The agent assistance feature allows you to send a message to queue supervisors so one of them can help you effectively handle issues that arise.

In this section, we'll take a look at how to send an agent assistance request so you can get the help you need when you need it.
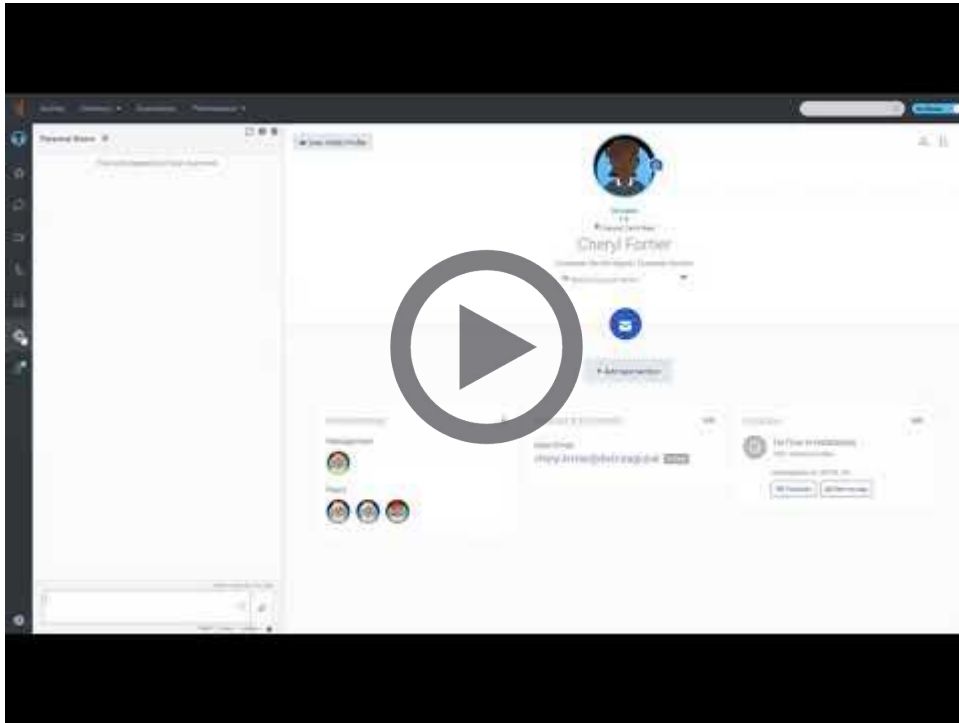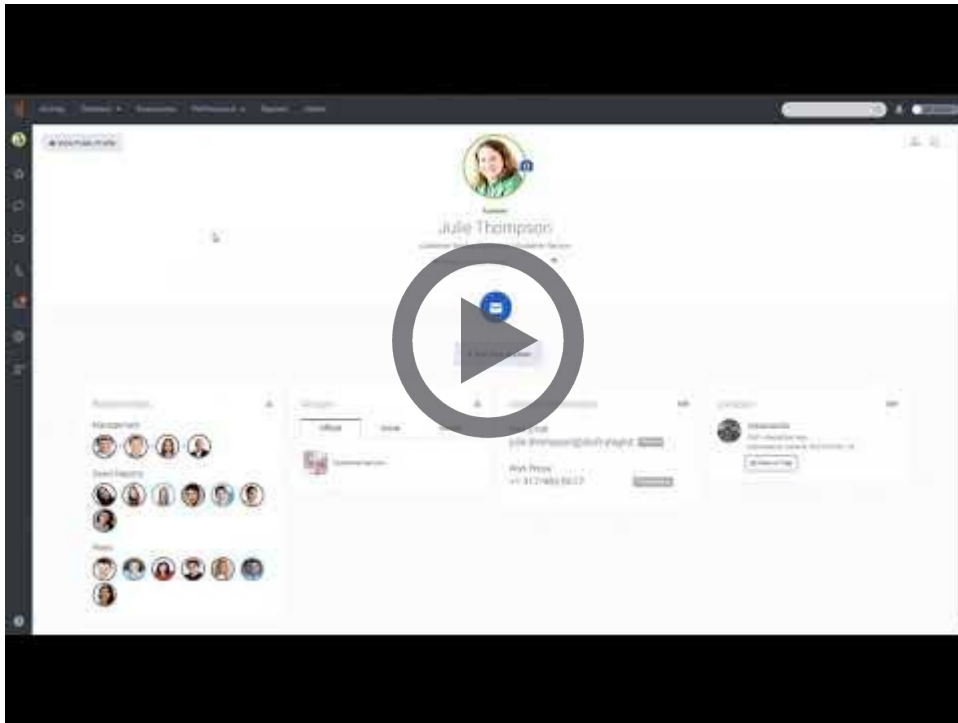

Case Study
You have an irate customer on the phone who is demanding to speak with a supervisor. You use the Agent Assistance feature to send an assistance request to all the queue supervisors.

Section 3 | Managing Agents

3.1 Agent Status

Tracking your agents' time is a powerful tool to help you manage your team and the contact center. The dashboards and dynamic views allow you to see real-time statistics, whereas Reports help you to identify trends over time. These details can assist you in recognizing which agents to reward and which agents to coach.
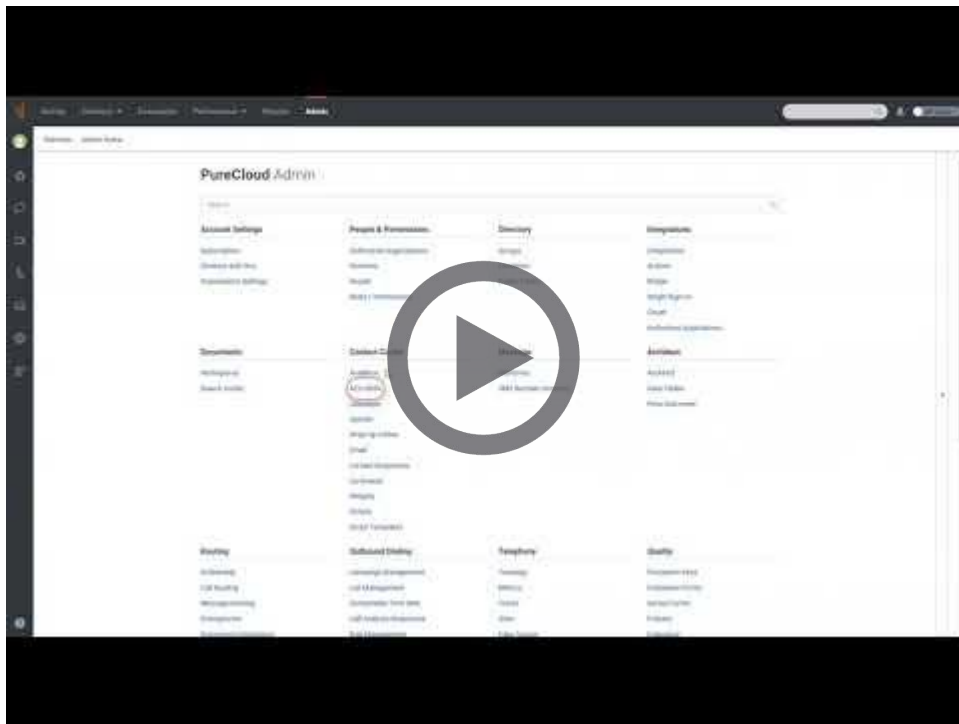

Case Study

You have been monitoring the Marketing queue and notice that a new agent, Betty, changes her status to busy after every call. You view the report for the past two weeks and see that she spends an excessive amount of time in a busy status. When you speak with her about it, you discover that she did not understand how the After Call Work (ACW) works and was manually changing her status so that she could complete her ACW. With a little extra training for Betty, you were able to resolve the issue easily.

3.2 ACD

An automatic call distribution (ACD) system processes incoming interactions (calls, web chats, email messages, and more) and dynamically selects the most appropriate agent to handle an interaction, based on:

- The language and skills needed to successfully handle the interaction.
- The available agents' skills and languages.
- The maximum number of interactions allowed for the available agents.
- The queue evaluation and routing methods.
- Agent availability.

Case Study 1 - Languages
You may have agents who interact with customers in more than one language. By designating which agents speak which languages, you can make sure that the customers are connected to someone who will understand them.

Case Study 2 - Skills
Only 10% of your agents are certified to help Diamond customers. If you give those agents a certified skill, you will make sure that your special customers always speak to the right agents.

Case Study 3 - Agent Utilization

Your agents work in a high-pressure environment with a lot of customers contacting them with sensitive information. This means the agents can get burnt out quickly. You want to lower your staff turnover, so you use agent utilization to make sure they only handle a certain type and number of interactions at a time. Agent utilization also helps to make sure that interactions are being handled with your service-level expectations in mind. If you are expected to answer 80% of calls in 20 seconds or less, but you have 24 hours to respond to emails, you can make sure that an agent who is working on an email can be interrupted to take a call.

3.3 Dynamic View Alerts

Alerts allow you to monitor what's going on in the contact center without staring at the dashboard all the time. You can set alerts and be notified when statistics fall outside of defined ranges. Alerts can be used to monitor agent adherence, maintain agent availability targets, and monitor KPIs.
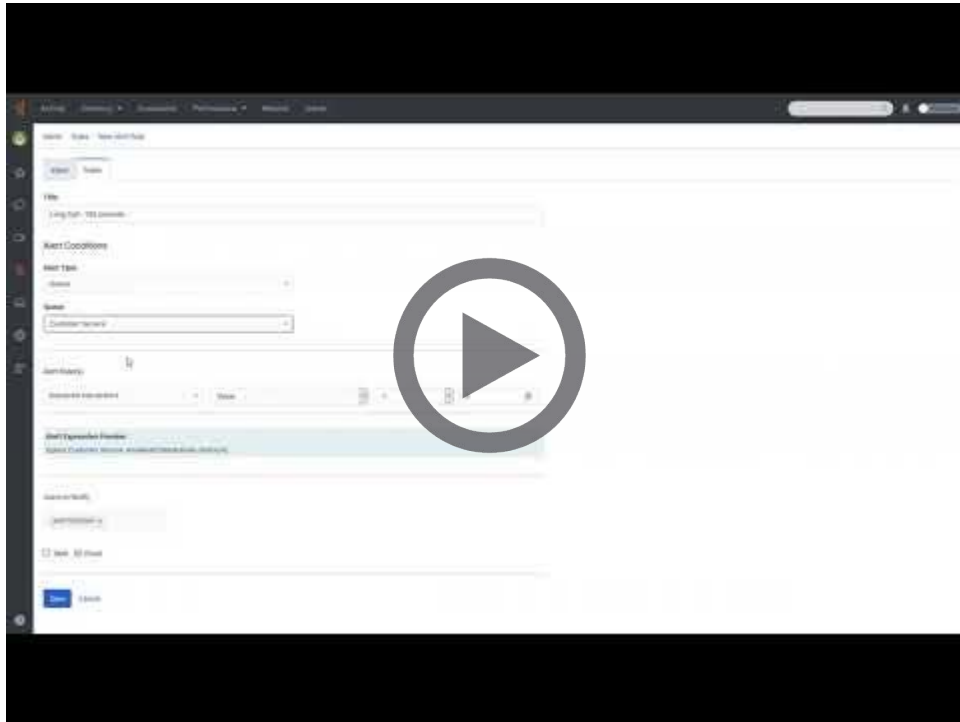
Case Study

You have a KPI in your contact center to keep the abandon rate in the Marketing queue at or below 4%. By creating an alert rule to send an alert notification when abandons exceed 4%, you know that you need to add agents to the queue to ensure that you don't exceed the target abandon rate.

You can create an alert rule that can be used to monitor time in status. Let's say you want to monitor the time that agents spend in After Call Work. Agents are allowed 30 seconds to complete After Call Work. You can create a queue alert that will send an alert notification anytime the total After Call Work time exceeds 30 seconds. This gives you an opportunity to coach the agent immediately regarding their performance.

Genesys Cloud

3.4 Agent Evaluations

Every contact center needs a quality evaluation process to identify gaps in the organization. A good quality evaluation strategy will improve key performance metrics and raise quality standards, which directly reflects into increased customer experience. Agent evaluations help you to identify the training needs of the agents and areas of improvement in the agent's scripts.
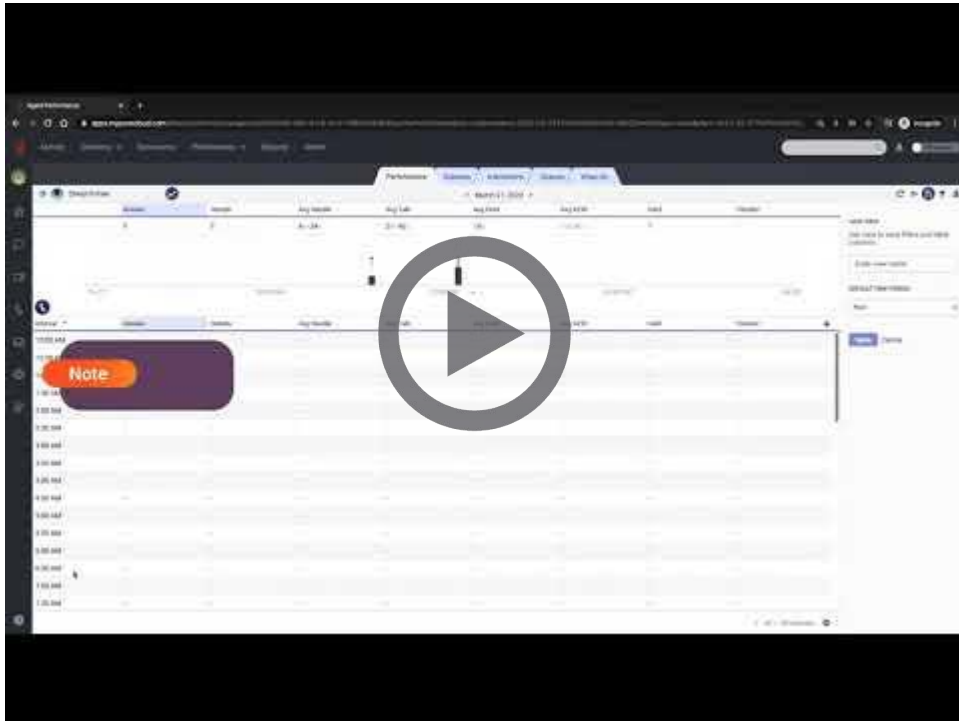

Case Study

You are a Supervisor in a contact center. A new group of employees, mostly interns, joined your organization three months back. Now, you need to evaluate them to update their skill levels in your Genesys Cloud environment. Using the quality evaluation process, you can upgrade/downgrade the skills for each one of them.

3.5 Monitoring

The ability for you to monitor an interaction between your agents and customers is very important. It allows you to monitor an agent in real-time and see how well they interact with customers. This allows you to see if your agents may need additional training, or if they are performing as required. Agent monitoring can also be useful if an agent asks for assistance with a call–you can monitor the call and give real-time feedback about what actions to take.
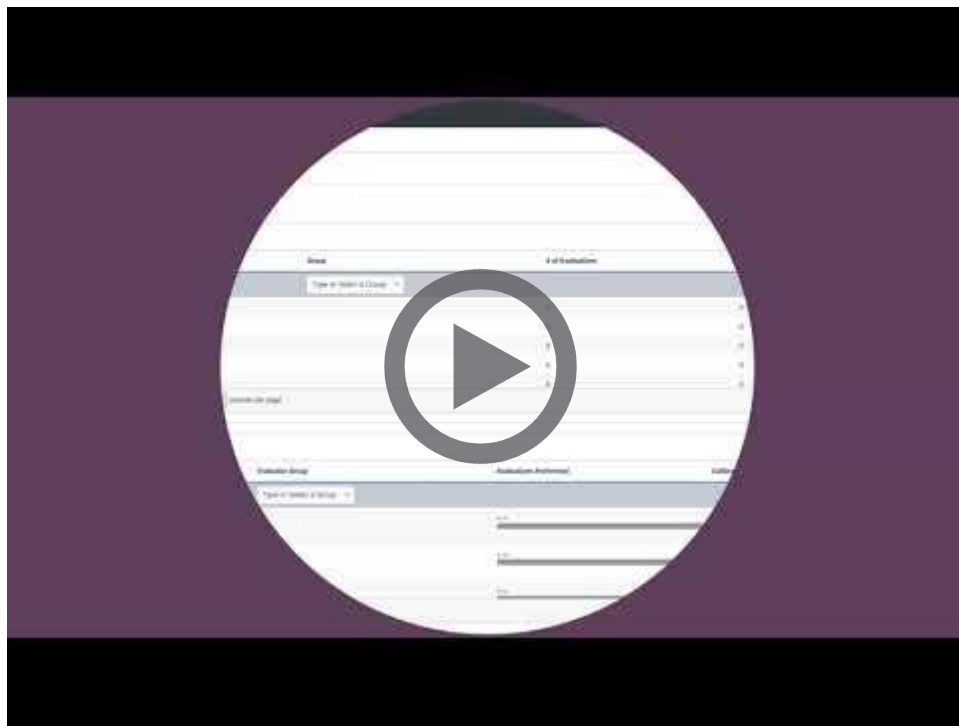

Case Study

You have seen from performance data that Tom has calls that last a long time, and customer surveys indicate a low satisfaction for the calls he has handled. You can monitor Tom's calls in real-time to see if there is anything that can be done to improve the customer experience. You can either give this feedback to Tom in real-time through chat-based coaching or wait until after the call has finished.

Section 4 | Analytics

4.1 Analytics Overview

Dynamic performance views in Genesys Cloud provide lots of data to help you make informed decisions about your contact center and agents. This timely data enables you to act quickly when situations arise that require your immediate attention.

Reports, on the other hand, provide historical information. This allows you to review data within specified time periods, enabling you to identify trends and track overall performance.

Case Study - Real-Time Statistics
You can use real-time statistics to see how many customers are waiting in a queue and respond immediately by adding more agents to the queue. You can also see when an agent's performance is below par so you can arrange additional training.

Case Study - Reports
You can use reports to identify if your call center is meeting its key performance indicators for a defined period of time and respond accordingly. You can also see if an agent's talk time is more than his peer's average, so you can provide targeted coaching or additional training, as necessary.

4.2 Navigate Dynamic Views

Dynamic views are also called near-real-time views. In this lesson, you'll see how to navigate dynamic views and look at data in the contact center dashboard, queues dynamic views, interactions dynamic views, and agents dynamic views. You'll also see how to manage agent status and presence, and use alerts to manage queues and agents.
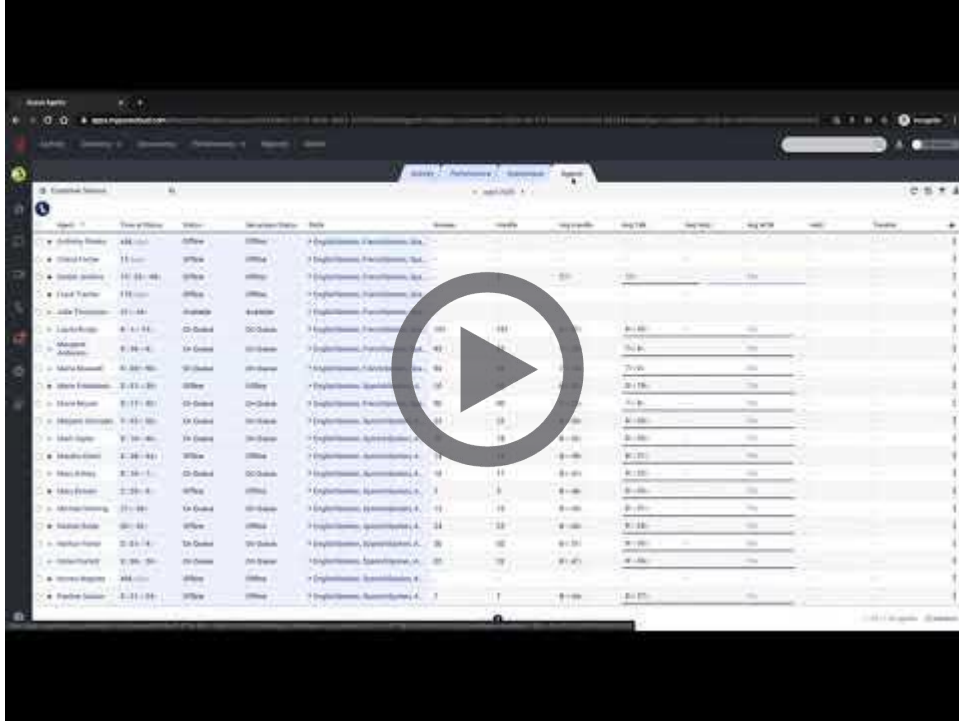

Case Study - Example 1
You want to evaluate interactions that were handled by the Marketing queue and had a talk time of more than 20 minutes. From the Interactions view, you can limit the records that display by selecting "Over 20 minutes" for the duration and selecting the Marketing queue from the drop-down. Then you can click on a specific interaction, and view a timeline of the interaction, and listen to the recording (if one exists).

Case Study - Example 2
Several agents have complained that Betty has not been carrying her weight. She seems to have fewer calls than anybody else. Using the Agents view, you can search for Betty, then click on her name and look at her real-time stats for the current interval, as well as historical queue performance data, time management data, and a list of interactions she has handled for the interval.

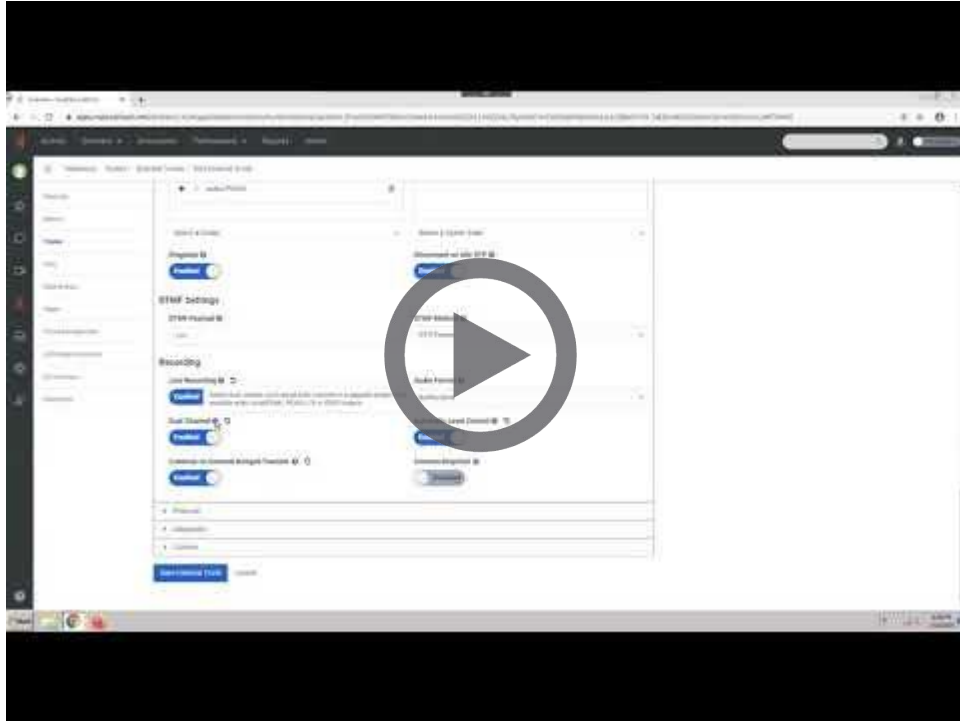# Section 5 | Genesys Cloud Recording and Quality Management Basics
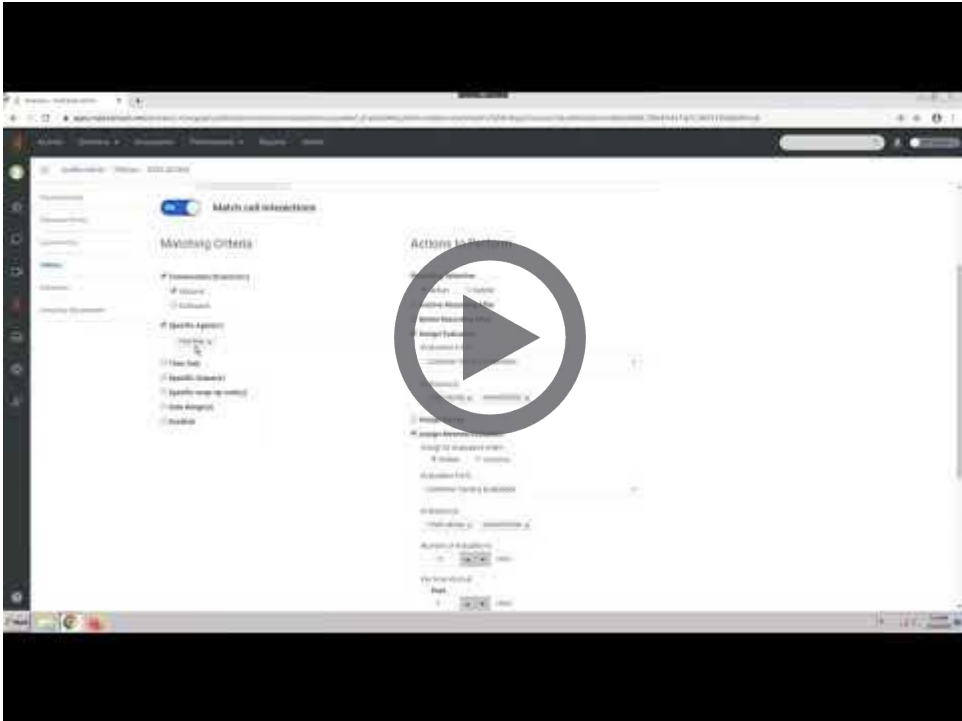
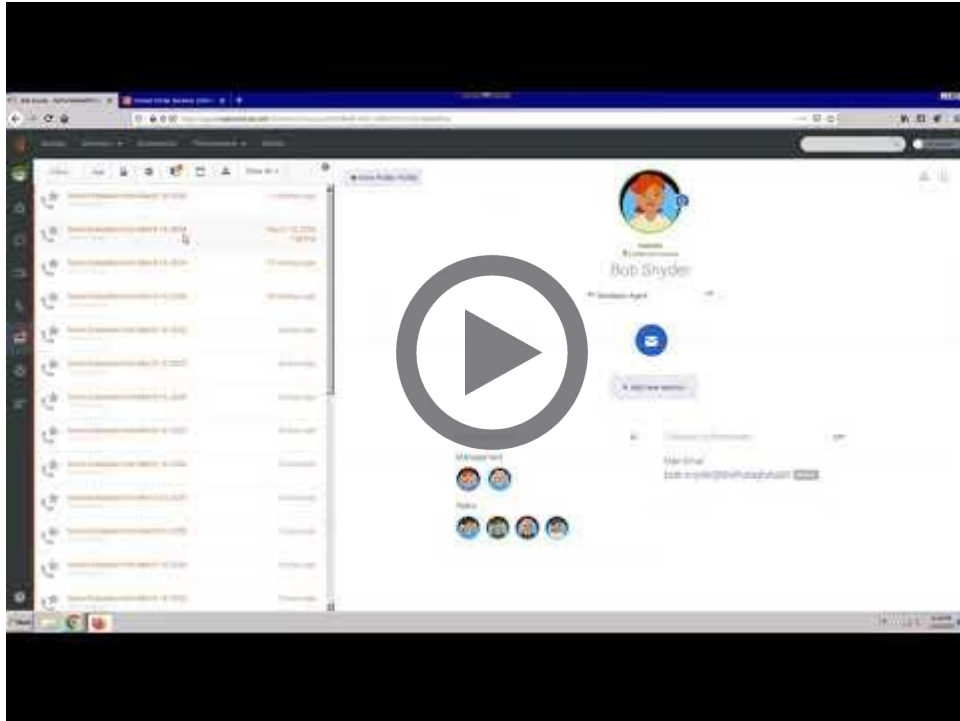## 5.1 Meet Your Instructor
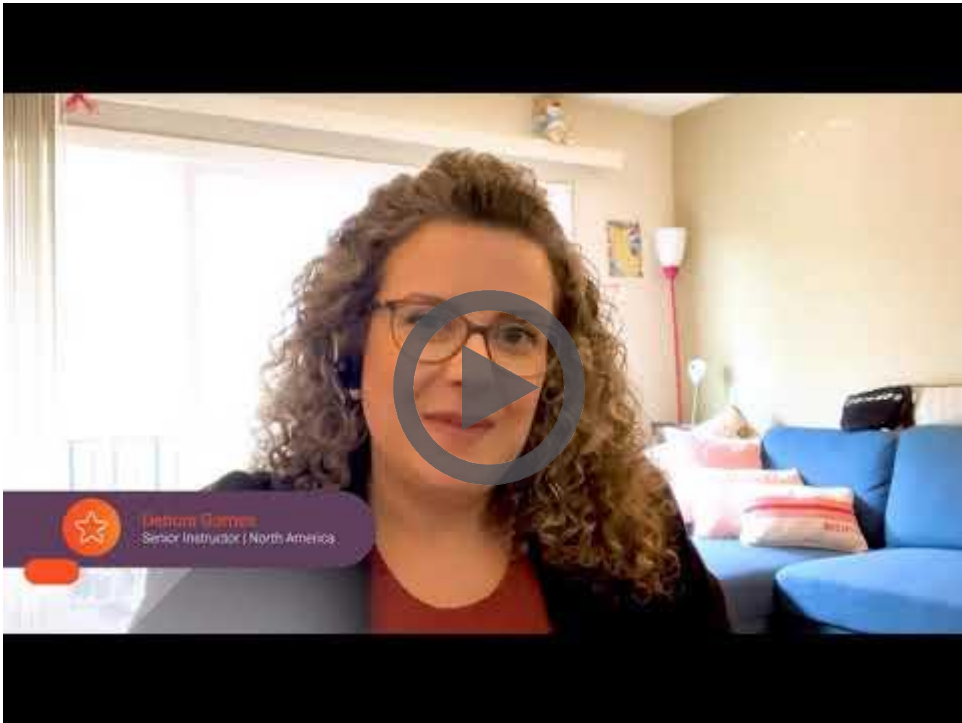
5.2 Assigning QM Roles & Permissions
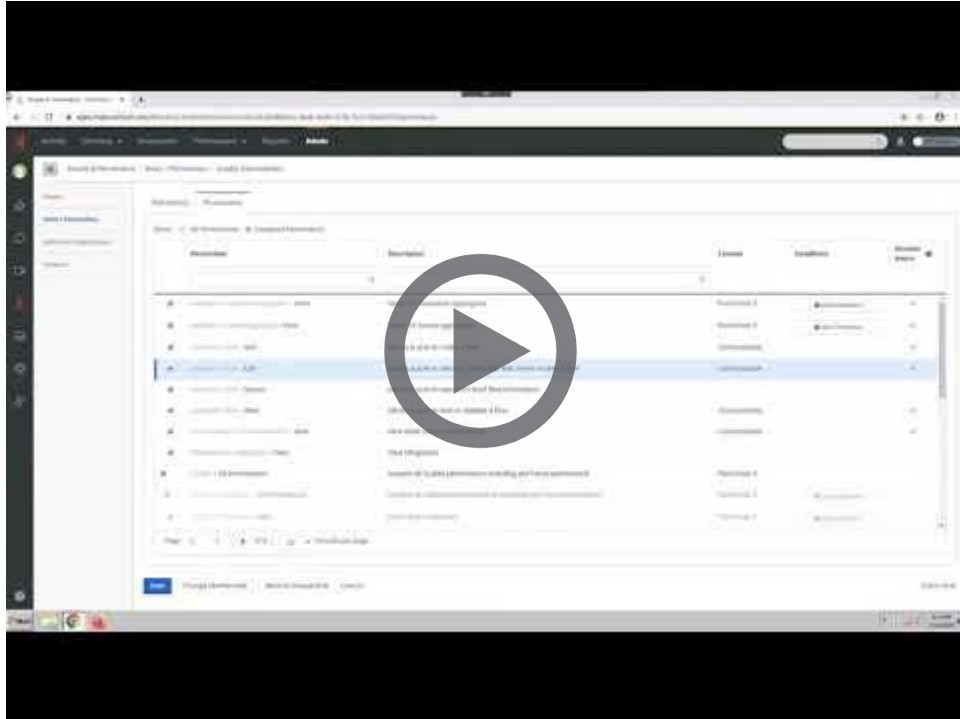
5.3 Call Recording Enablement at The Trunk Level

5.4 Setting Recording Policies

5.5 Agent Evaluations and Calibration

5.6 Agent Activation-Deactivation With Associated Queues