powernet®

Contact Center Agent Training Guide

Genesys Cloud

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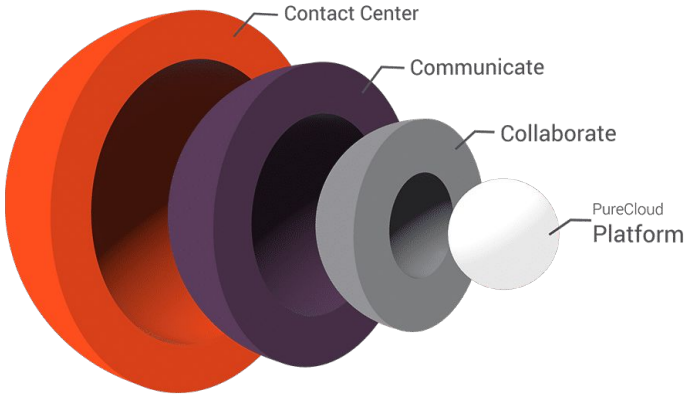
Section 1 | Genesys Cloud Overview

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.

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.

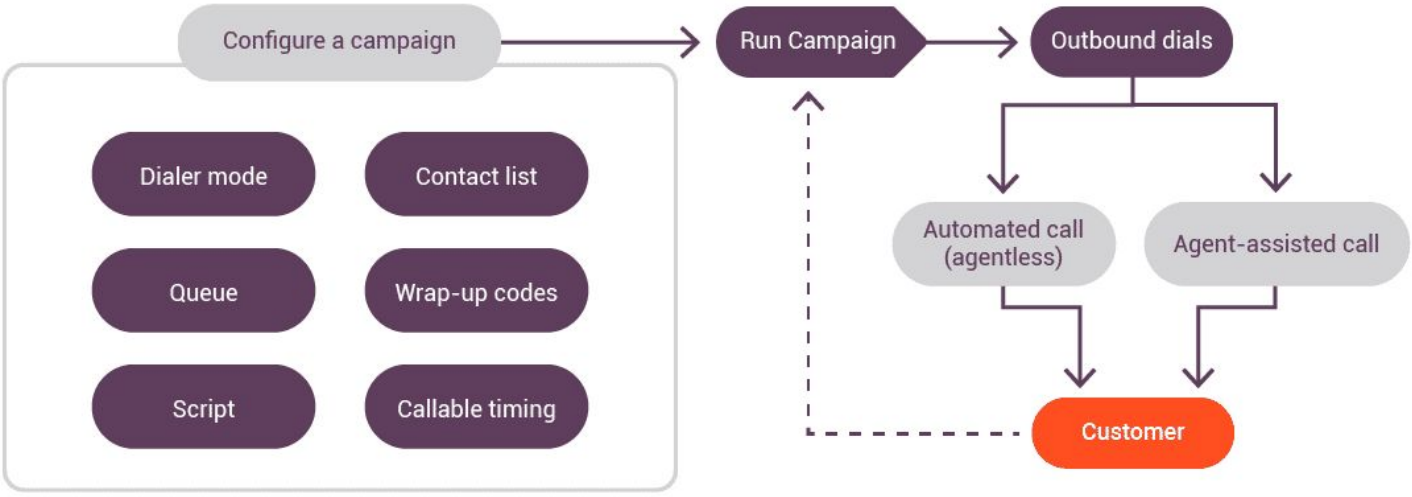
To assist the agents when they place the callback, a simple script pops up displaying the name of the caller based on the ANI and Calling Party Name associated with the original call, the phone number, and the amount owed on the account.

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.

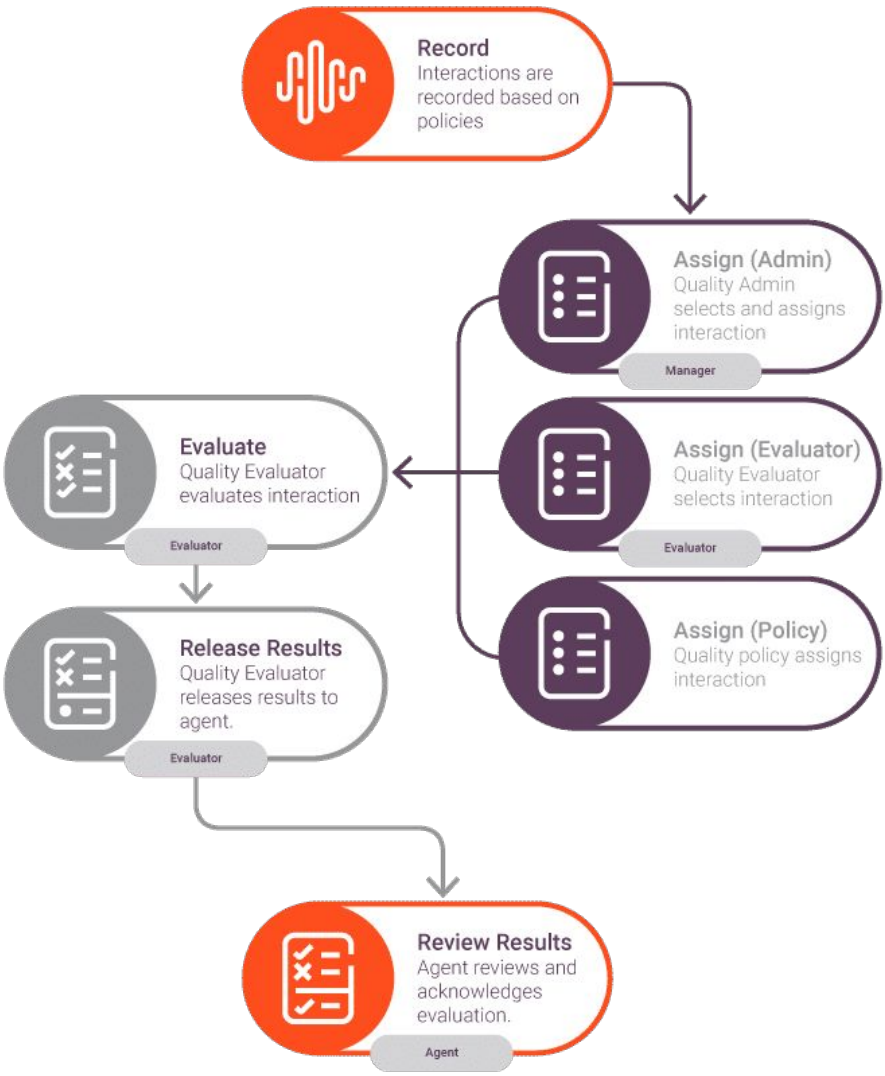


1.6 Quality Management in the Contact Center

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.

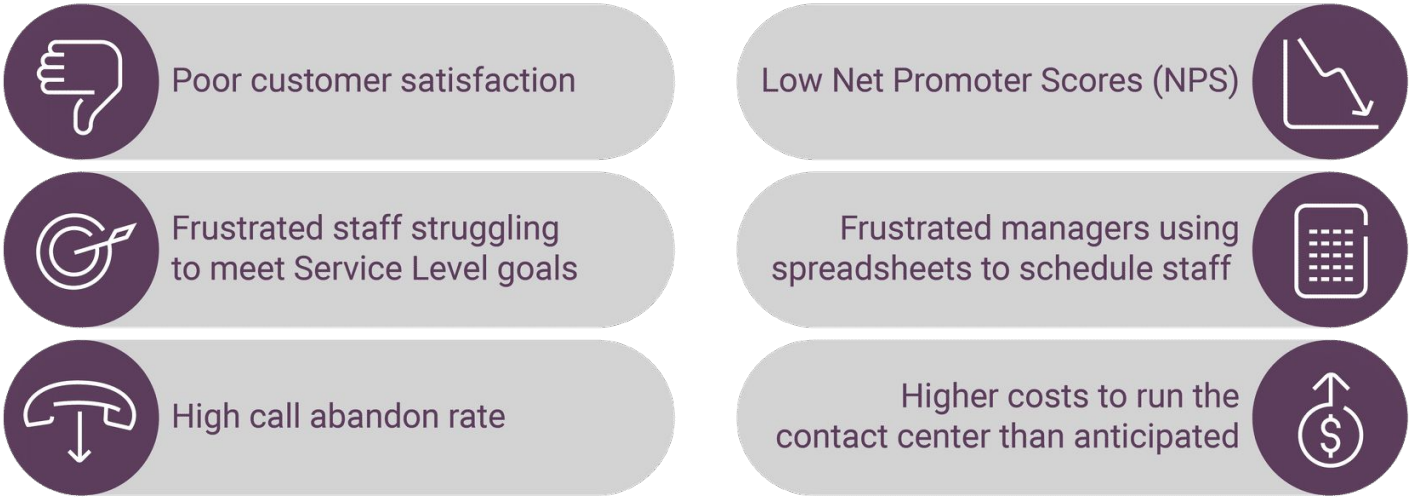
PureCloud Contact Center has multiple tools used for quality management: recording policies, evaluation forms, performance dashboards with dynamic views of statistics, call monitoring and historical reports. All these capabilities help a contact center run smoothly, providing the best possible customer 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:



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:

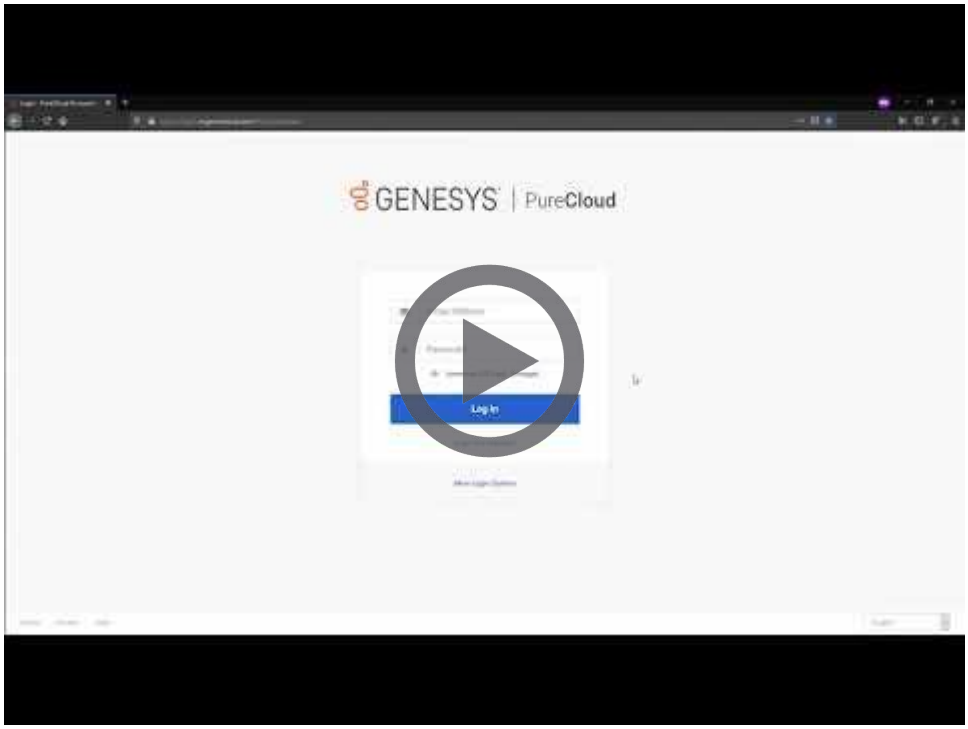
- Develop short-term forecasts.
- Evaluate intraday differences between forecast and actual values.
- Create and manage schedules.
- Perform load-based schedule generation.
- Monitor adherence to schedules.
- Show agents their schedules.
- Manage time-off requests.

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

Section 2 | The Basics

2.1 Log in & Choose Phone

You'll log in from a browser on your desktop, so all of your other desktop applications are only a click away. In this section, we'll cover the basics of logging in and out, plus how to associate a phone to your Genesys Cloud account.



Case Study

You work as a remote agent for a travel service. Whether at home or the family's lake cottage, you can connect to Genesys Cloud and do your job – all you need is access to the Internet, a supported browser, and a configured phone or softphone.

2.2 Navigate Genesys Cloud

In this section, we'll introduce the basic elements of the interface, including the communication side bar, menu bar, and the content viewer. We'll get you familiar with where things are and how to find what you need so you can do your job.

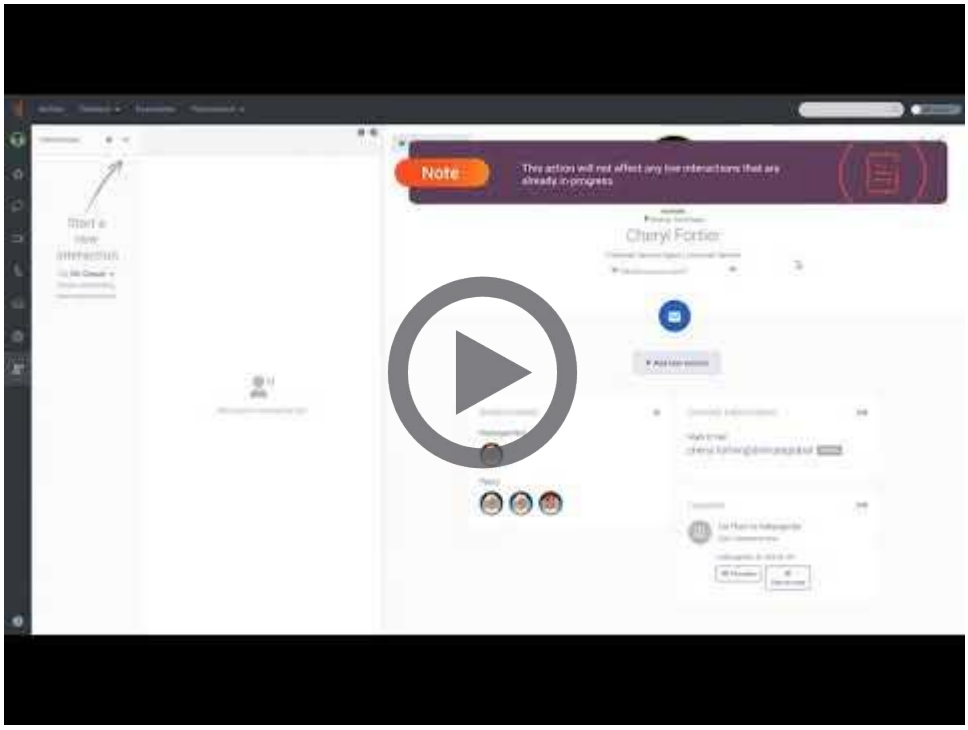
Case Study

You work at a customer support center at a cable company. You haven't been able to resolve a customer's issue and need to find an expert to help. You jump into the Genesys Cloud directory, perform a quick search to find someone with the appropriate expertise, and start a chat. You can still keep the customer engaged while chatting with the expert to help resolve the problem.

2.3 Manage Presence and Status

As an agent, it's important to designate your status to go On Queue – you won't receive calls until you do that. You'll also use Off Queue status options to let others know when you're on a break, at lunch, in a meeting, working on non-ACD tasks, or when you go home at the end of the day.

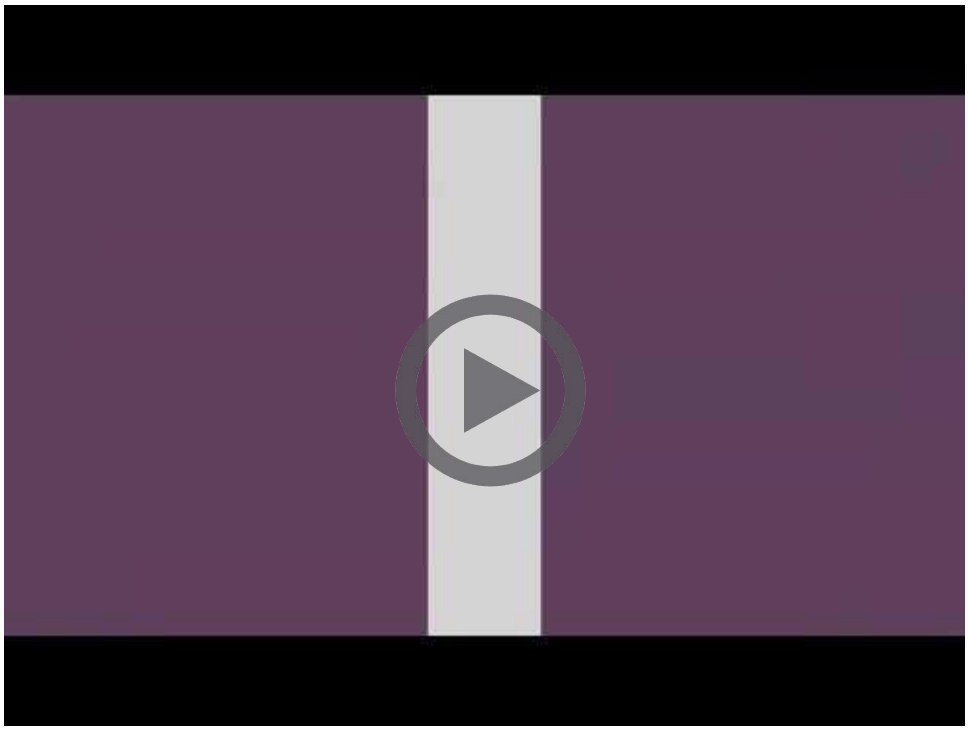
Supervisors use statuses to track your adherence to your schedule, and your colleagues use it to know when they can reach out to you for questions and support. When everyone manages their status effectively, collaboration is much easier since you know if someone is available for a video chat, chat, or voice call. In this section, we'll demonstrate how to select the appropriate On Queue and Off Queue status.



Case Study
When you begin your workday and are ready to take customer calls, you select **On Queue**, and the system sees that you're active in the queue and knows it can send customer calls and chats your way. When your break time or lunchtime arrives, you change your status to **Away**, so the system won't send any more calls to you. When you return from your break, you set your status back to **On Queue** and start receiving interactions again.

2.4 Queues

In this section, we will discuss the details of **On Queue** and **Off Queue**, selecting a queue, and what happens when you're **Not Responding**.



Case Study 1
As a senior agent, your main tasks are frequently special projects. Most of the time you are in Genesys Cloud, you are **Off Queue** so that you can work without interruption. There are times, however, when you help cover the queue when someone calls in sick, or during peak times of the day. During those times, you can make yourself **On Queue**.

Case Study 2
At the end of every call, you have to print off a document to send for signatures and approvals. Occasionally, the printer needs to be reloaded or has a paper jam. If you are away from your desk for longer than anticipated, Genesys Cloud will make sure that your status changes to **Not Responding** so that the interaction goes back into the queue to be answered by someone else.

Section 3 | Interactions

3.1 Answering an Incoming Call

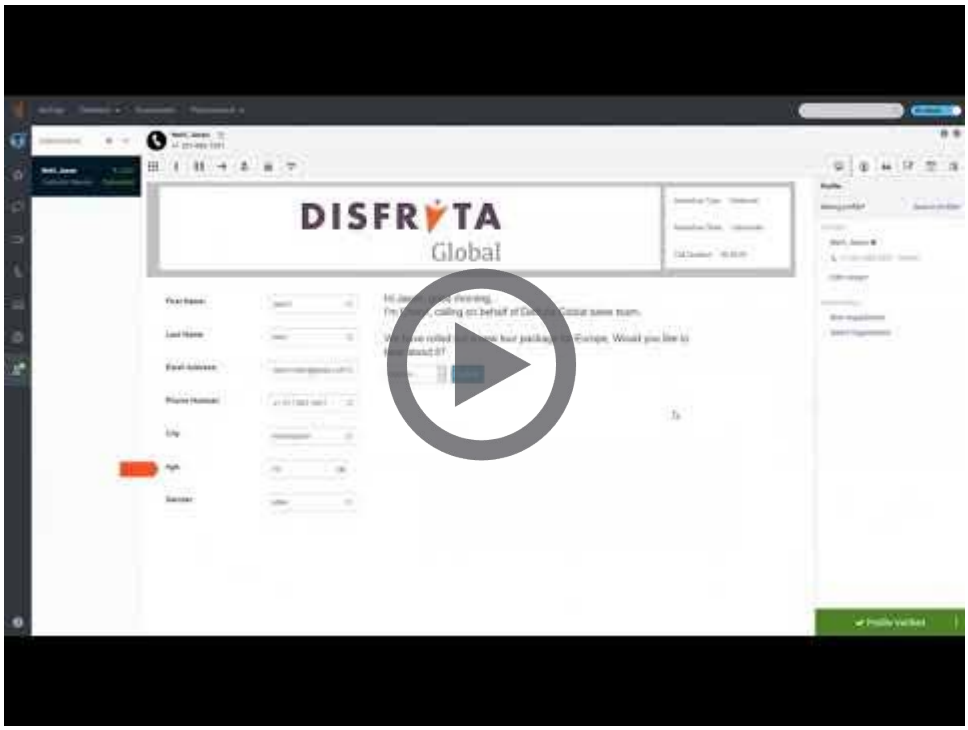
Once you have a basic understanding of the Genesys Cloud interface, you'll want to make sure that you understand how to answer calls and chats reliably. Genesys Cloud displays bold visual cues for handling interactions so you can see what you need to do and how to do it at a glance. Actions like transferring calls, simultaneous voice, chat, and email, and reaching out for assistance are all simple, intuitive, and fast.

In this section, we will learn how to go On Queue and receive incoming calls or chats.

Case Study 1
Your contact center handles calls and chats from customers. You're currently on a chat with a customer when you receive an incoming call alert. You can easily pick up the customer call while continuing your chat with another customer.

3.2 Using Scripts in Voice

Contact center scripts provide an agent with on-screen information about the current interaction. Scripts may contain instructions about what an agent should say in response to the customer's query. According to the interaction type, your script will have fields in which you need to enter details about the present interaction. An agent following an effective script will help result in reduced resolution time, improved consistency across interactions, increased first call resolution, and many more benefits. In this section, you'll learn how to use scripts effectively.



Case Study 1

You are part of a sales team and must explain new vacation offers to clients. The tour packages are organized based on location, duration, and number of people. As an agent, you need to follow the on-screen scripts to sell the tour packages. A well-developed script ensures that agents see appropriate instructions based on customer responses.

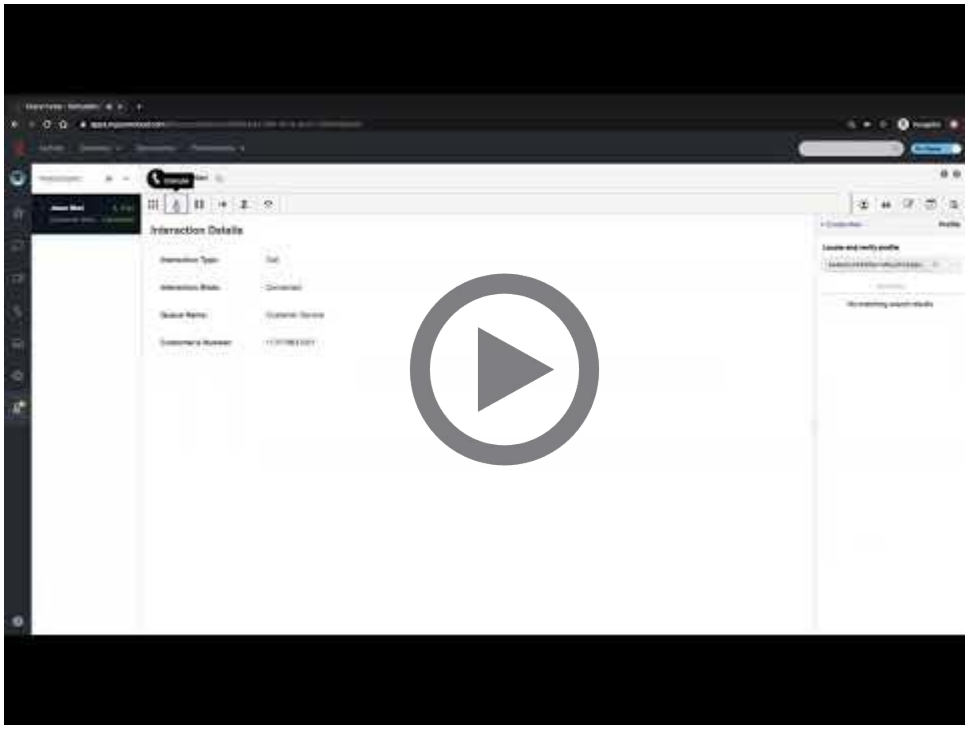
Case Study 2

A customer is having an issue with broadband billing, so he calls your contact center to clarify his billing details. When you're connected to the call, you are able to see the previous three months of billing and payment details on the dashboard. The script enables you to have a detailed view of the billing history based on the customer's phone number.

3.3 Mute and Hold Calls

Sometimes you're on a call and must mute or hold that call. Muting a call only silences sound on your end of the call – you can still hear the other caller. Holding a call, however, silences both parties. And in the case of a one-to-one call, placing a call on hold starts hold music.

In a conference call, though, no hold music plays. Let's look at how to place a call on mute and hold.



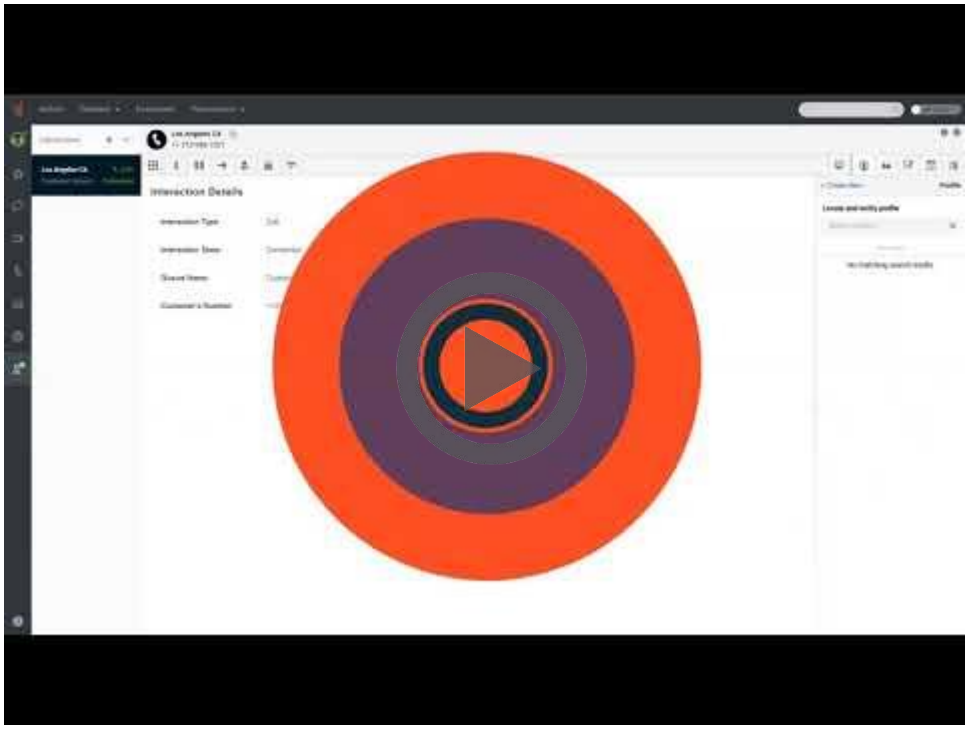
Case Study

You're on a call with a customer and feel a sneeze coming on. You quickly mute the call, so the customer doesn't hear you sneeze. Also, you must look up some information to help with this customer's inquiry. Since you cannot talk to the customer while you look for the required information, you place the caller on hold. While on hold, the customer hears the hold music and knows when you are back online with them.

3.4 Secure Pause

In most contact centers, policies require queued calls to be recorded. During these calls, there are times when you may need to get confidential information from the customer such as a credit card number or insurance ID number. The secure pause button allows you to manually pause the recording of the call when sensitive information is being given and then unpause the recording once the information has been gathered.

The secure pause feature helps maintain compliance for the call center by excluding the customer's confidential information from being recorded.



Case Study

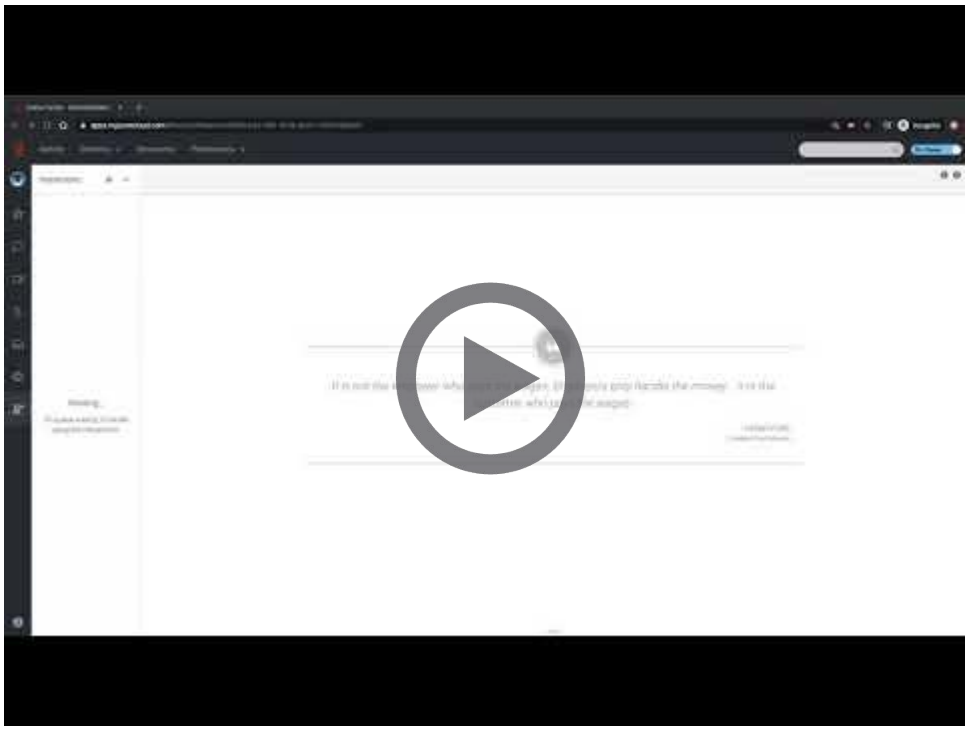
You work in a retail contact center and are assigned to the customer service queue where all interactions are recorded. A customer calls in to purchase a pair of shoes. Once she's ready to check out, you need to use the secure pause feature to pause the recording of the phone call while you accept and verify the customer's credit card information. After you finish gathering this information, you resume recording by deactivating the secure pause feature.

3.5 Transfer Calls

Genesys Cloud offers two types of transfers, a blind transfer, and a consult transfer. What's the difference?

When you perform a blind transfer, you'll transfer the call without speaking to the new recipient first. You might use a blind transfer when a customer knows where they need to be routed, or the receiving agents don't need an explanation of the caller's situation.

You might perform a consult transfer if you need to talk to the new agent and offer background details about the caller's problem before transferring the call. Or you could consult with both the new agent and the caller, at the same time.



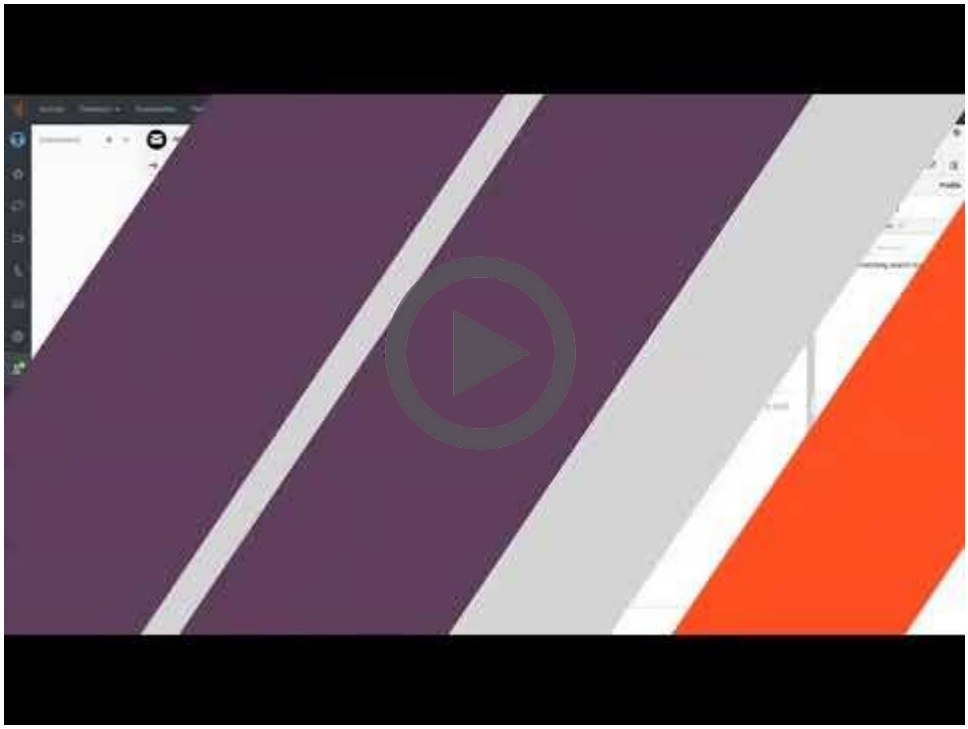
Case Study 1
A caller makes an incorrect selection on the IVR menu and wants to transfer to a different queue. You blind transfer that call because there is no need to talk to the new recipient.

Case Study 2
You are working on a support desk but must escalate a caller because you haven't been able to resolve their issue. You want to explain the steps you've taken so far to the new agent, so you perform a consult transfer. The consult transfer allows you to speak to the new agent before connecting the customer.

3.6 Email and Chat

Not every interaction comes in the form of a phone call. In today's technology-driven culture, many organizations like to offer their customers options when it comes to communicating. Email and chat are two popular options many organizations offer as alternatives to phone calls.

In Genesys Cloud, email and web chats are routed through ACD just like phone calls. So, as an agent, you'll get interactions that are appropriate for your skills, language, and/or priority levels.

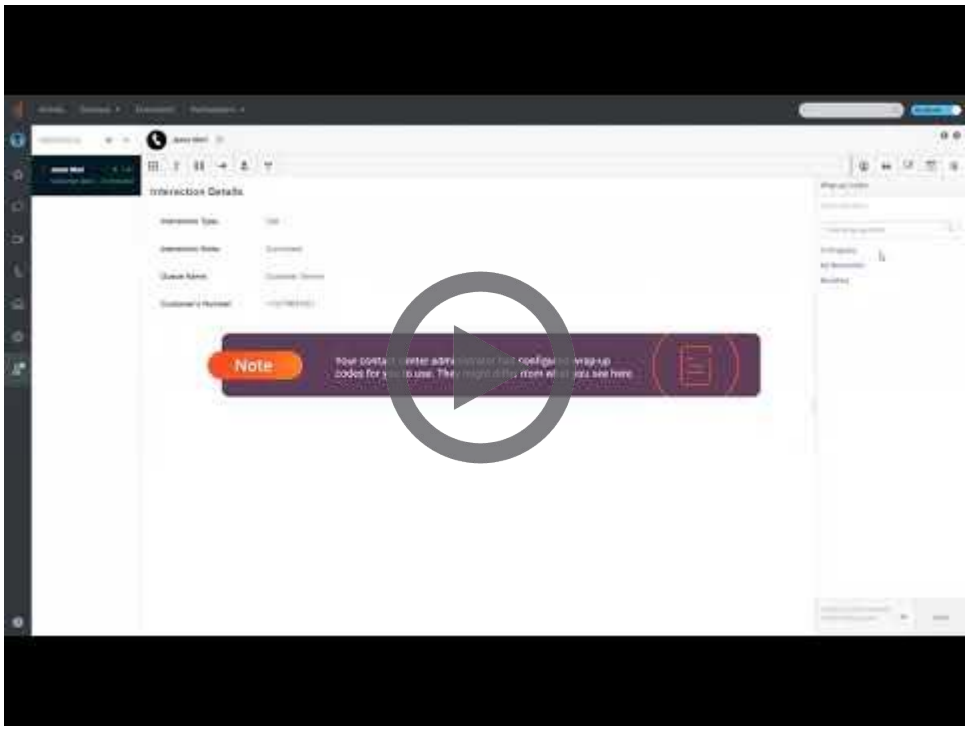


Case Study
Your company has global customers and offers bonus pay for multi-lingual agents. You have worked hard to learn a second language but don't feel comfortable in verbal conversations yet. While you take calls in your native language, you are also able to handle written emails and chat in your new secondary language and get that bonus pay!

3.7 After Call Work

After Call Work or ACW, if it's required in your organization, is completed immediately following an interaction before you can receive another interaction. It includes adding notes and designating wrap-up codes.

Wrap-up codes are predetermined codes that an agent chooses at the end of interactions to indicate the purpose or outcome. This work allows the contact center to learn more about why customers are calling, resolution status, and other qualitative data that helps stakeholders develop stronger strategies to support customers.



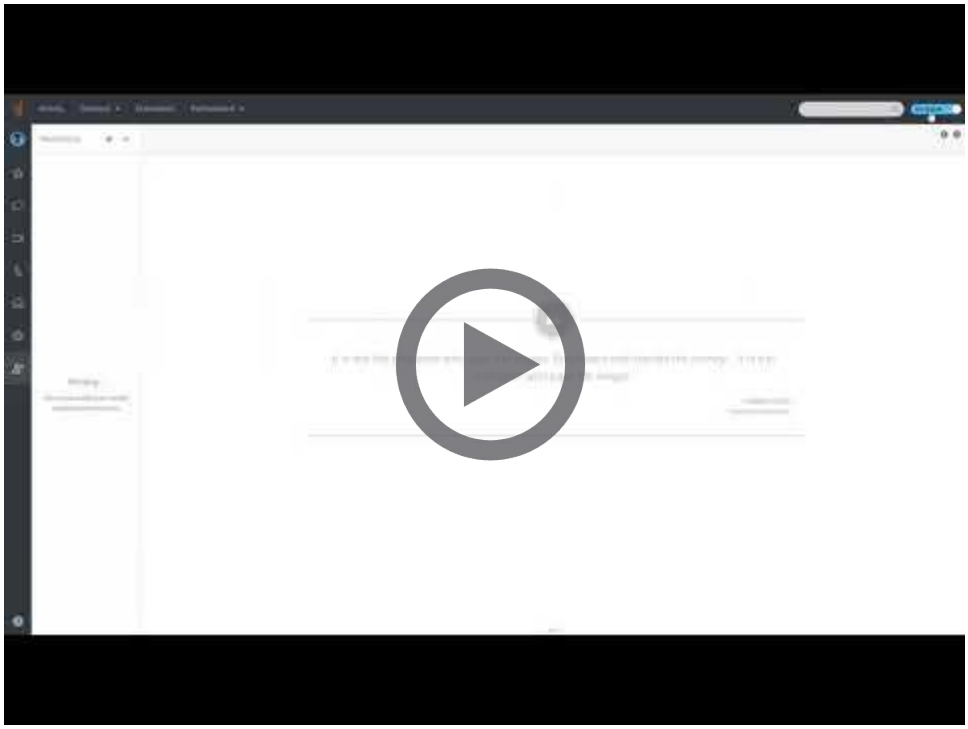
Case Study 1
You answer a chat from a customer who wants to purchase 25 widgets from your company. You complete the sale and use the wrap-up code for internet chat sales to indicate the purpose of the interaction.

Case Study 2
You answer a call from an upset customer who purchased 25 widgets from your company but only received 15. You resolve the issue and use the wrap-up code for incomplete order to indicate the purpose of the interaction. You mark the status of the resolution as pending.

3.8 Finishing the Day

It’s important to properly go off queue and log out when your shift is over. Otherwise, interactions might still be routed to you.

In this section, learn how to properly go off queue and log out of Genesys Cloud.



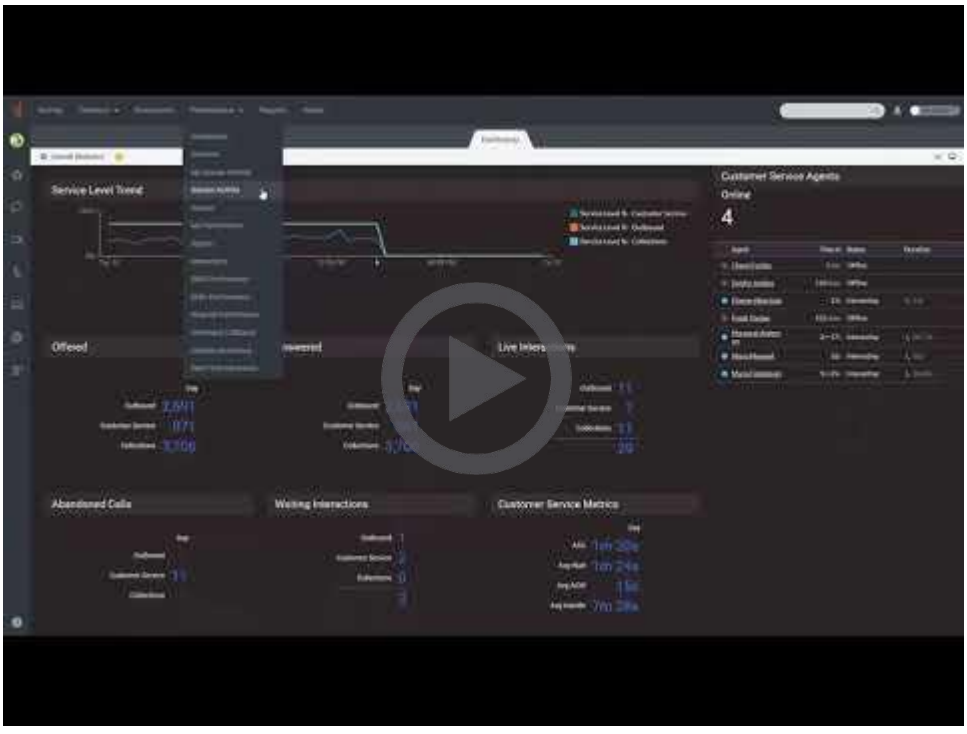
Case Study
Your shift is over for the day. You need to properly go off queue and log out to ensure interactions are no longer routed to you.

Section 4 | Analytics

4.1 Supervisor Dashboard

Genesys Cloud has developed a platform that enables organizations to monitor and improve their contact center business. In this section, discover the supervisor's views so that as an agent, you can understand the statistics your supervisor tracks. Also, become familiar with the agent dashboard where you can monitor your own performance.

Supervisors have a slightly different view in Genesys Cloud than agents do. But as an agent, it's helpful to know what's important to your contact center. Knowing the KPIs your supervisor monitors and the agent information that's available to your supervisor will help you stay on top of the job. In this section, discover what exactly a supervisor sees so that you know how to perform at your best.

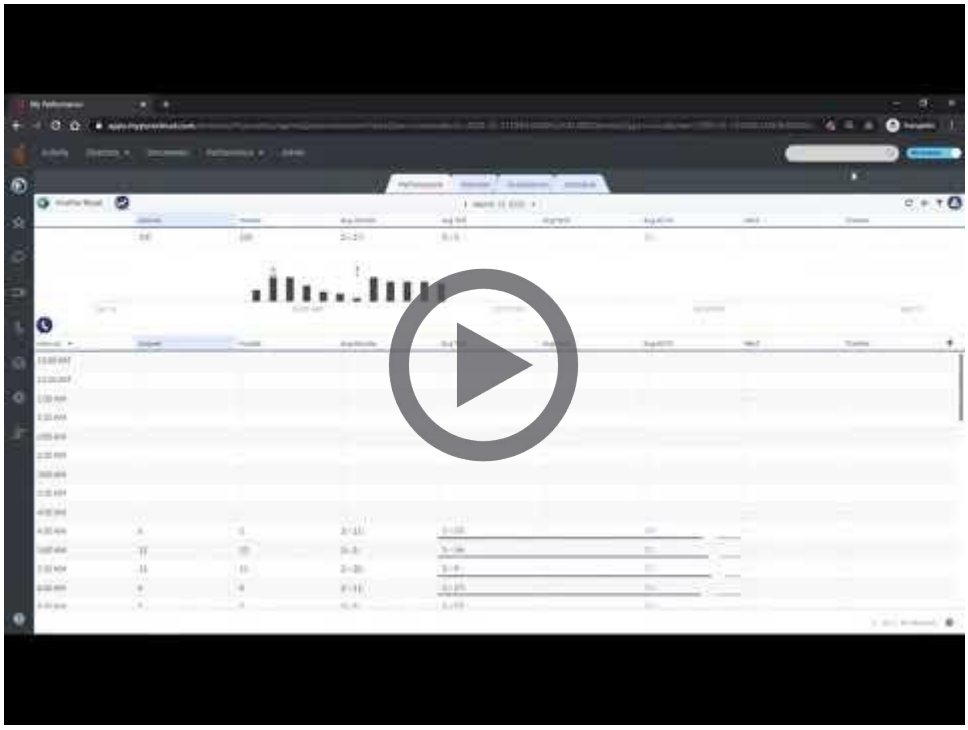


Case Study

Supervisors in your contact center take schedule adherence seriously because it helps them plan appropriately to meet the KPIs of the center. In your contact center, as an agent, you are eligible for a monthly bonus based on your schedule adherence. Your supervisor runs a daily agent status report each month to see who has adhered to the schedule. Since you adhered to your schedule 96% of the time, you receive 96% of the maximum award amount.

4.2 Agent Performance View

Use the My Performance views to view agent- and team-specific statistics, and to gauge historical performance. These views show you if you're meeting the goals of your contact center's KPIs, and they help you to recognize areas for growth and development.



Case Study

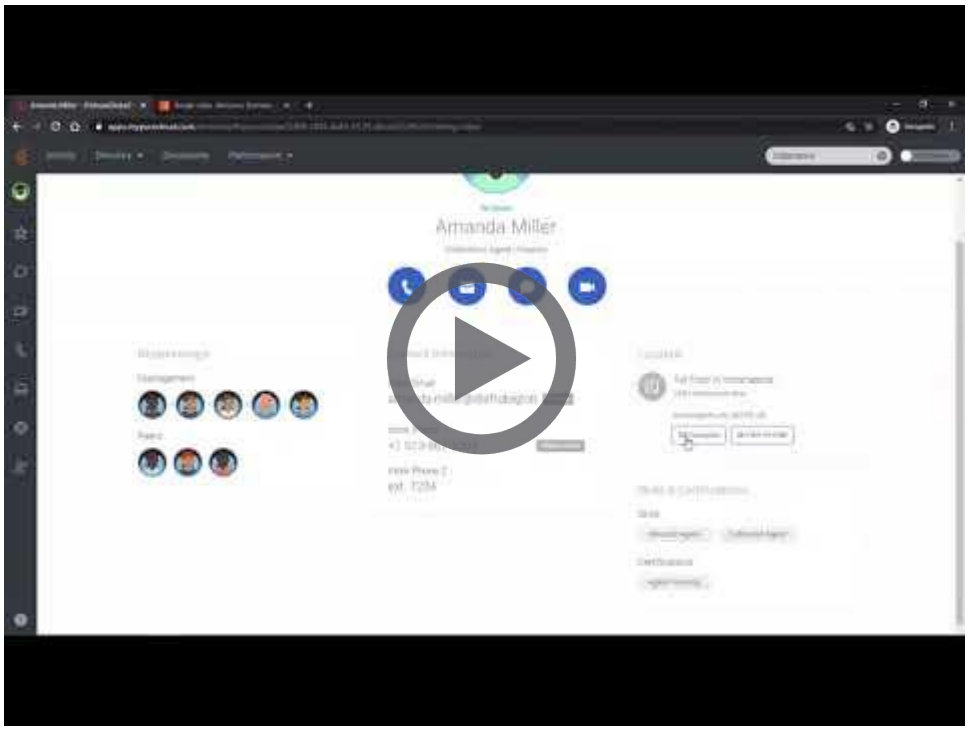
Your After Call Work (ACW) time is consistently longer than your team's average. You use this information to talk to your supervisor about ways that you can improve your performance and get your ACW time into the appropriate target time-frame.

Section 5 | Working Together

5.1 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.

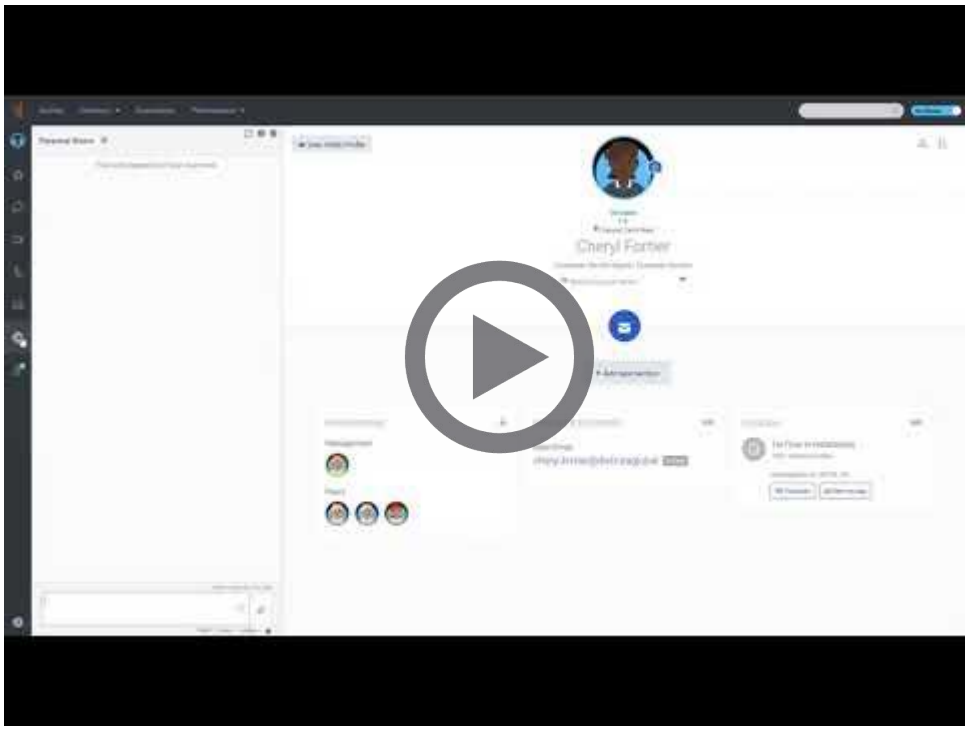


Case Study
You work in the customer service group. You receive a call from a customer who wants to check on their credit application. Usually, you transfer these types of questions to Jim because he is always so helpful, but he is on vacation. You use the directory to search for another person who works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

5.2 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.

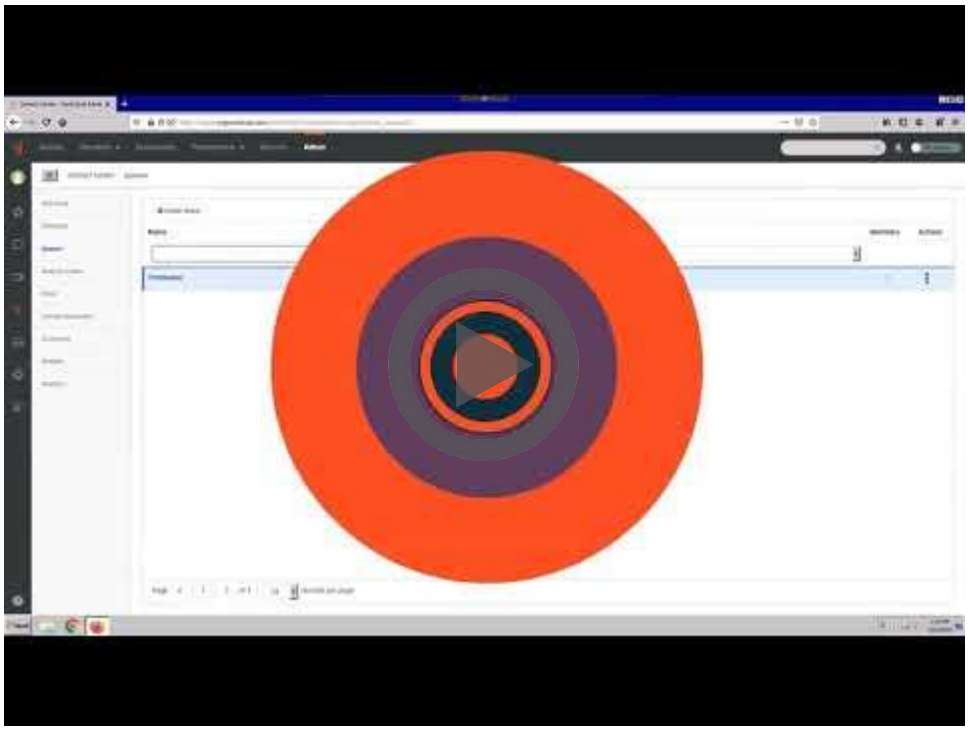


Case Study
You have an irate customer on the phone who is demanding to speak with a supervisor. You use the Agent Assistance feature to send an assistance request to all the queue supervisors.

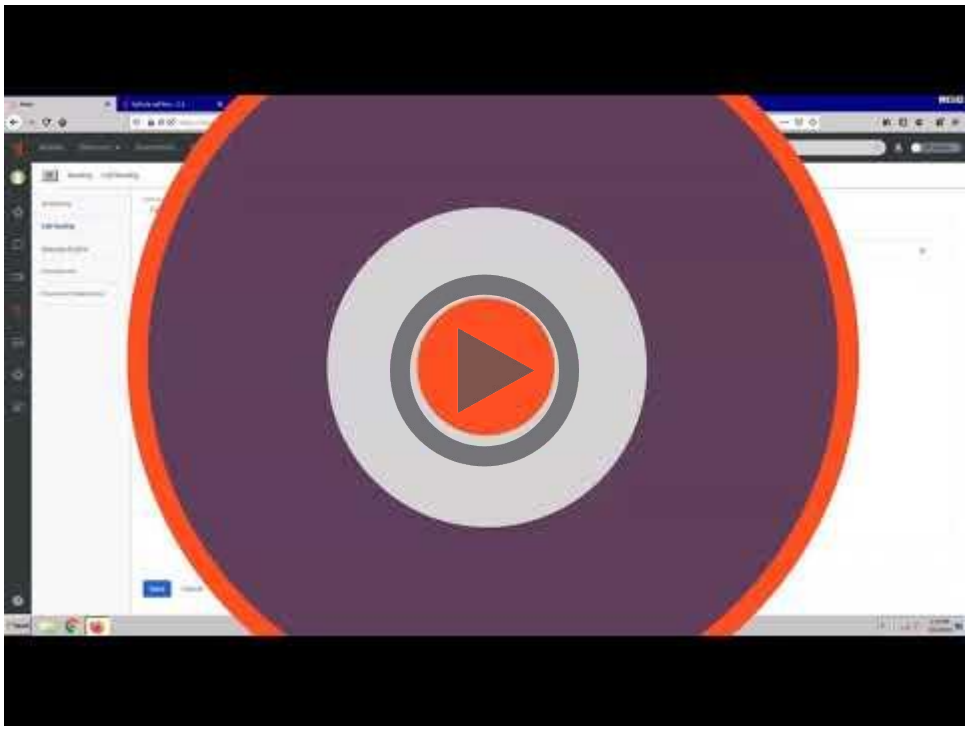
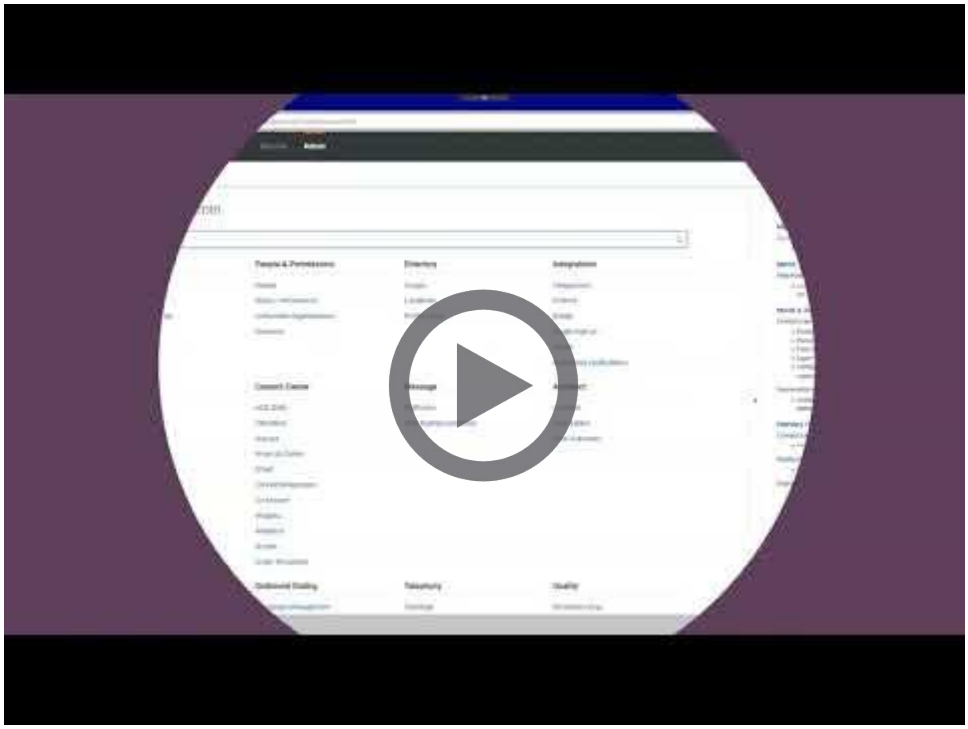
Section 6 | Genesys Cloud Routing

6.1 Meet Your Instructor

6.2 Basic ACD Concepts Including Evaluation and Routing Methods



6.3 Overview of Inbound Flows For Calls and Emails



6.4 Callback Configuration and Related IVR Dependencies