

G-Cloud 15
Service Definition

Genesys Cloud CX – Omnichannel contact centre

Kerv Experience Limited

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Executive Summary

Kerv Experience (Kerv) has over 26 years' experience of deploying contact centre solutions. As customers adopt modern cloud communication tools so should companies. At Kerv, we have built great value products and services that enable just that, with rich feature sets, speed and ease of adoption and the right partner to make the most out of your cloud technology investment.

Kerv's technology solutions are combined with world class-leading professional services, development services, support and managed services. This combination of value is geared towards improving customer experience and generating better business outcomes. For our Omnichannel proposition, Kerv partner with Genesys and their Genesys Cloud CX platform.

Kerv are an Elite Partner of Genesys, multi Genesys EMEA Cloud Partner of the Year and current Customer Success Partner of the Year. Every year, Genesys delivers more than 70 billion remarkable customer experiences for organisations in over 100 countries. Through the power of the cloud and AI, their technology connects every customer moment across marketing, sales and service on any channel, while also improving employee experiences. Genesys pioneered Experience as a Service so organisations of any size can provide true personalisation at scale, interact with empathy, and foster customer trust and loyalty.

This is enabled by Genesys Cloud, an all-in-one solution and the world's leading public cloud contact centre platform, designed for rapid innovation, scalability, and flexibility.

Social Value

Kerv's Sustainability program is centred around leveraging technology for the betterment of our people, planet and products. Organised under five key themes - Health, Well-being, and Communities; Products, Services, and Partnerships; Equity, Diversity & Inclusion; Climate Action; and Governance for Good – each theme is underpinned by an inclusive framework of 15 objectives and ambitious targets, all designed to foster holistic impact. Of the 15 objectives, notably, our pledge to donate 1% of our profits to charitable causes and increase staff volunteer time to 500 days is a proof of our dedication to making a positive impact on society.

Kerv is a purpose-led technology company built around the mission of using technology as a force for good, and that commitment is now formally recognised through its Certified B Corporation status. Achieving certification in August 2025 means Kerv has met B Lab's rigorous standards for social and environmental performance, accountability and transparency, earning an impressive B Impact Score of 109.9, well above the 80-point threshold required for accreditation. In becoming a B Corp, Kerv have an independent validation of its values-driven approach: demonstrating measurable impact for customers, creating an environment where specialists can thrive, and building responsible, trust-based relationships with partners and communities alike. This milestone positions Kerv within a global community of companies committed not just to growth, but to ensuring that growth benefits people, society, and the planet.

In line with our commitment to environmental stewardship, we've developed a comprehensive environmental impact management strategy guiding our efforts to minimise the environmental impact of the business. As part of these efforts, we've submitted our near-term emission reduction targets to the Science-Based Targets initiative (SBTi) for validation ensuring that our targets are not only scientifically grounded but also sufficiently ambitious to align with the objectives outlined in the Paris Agreement.

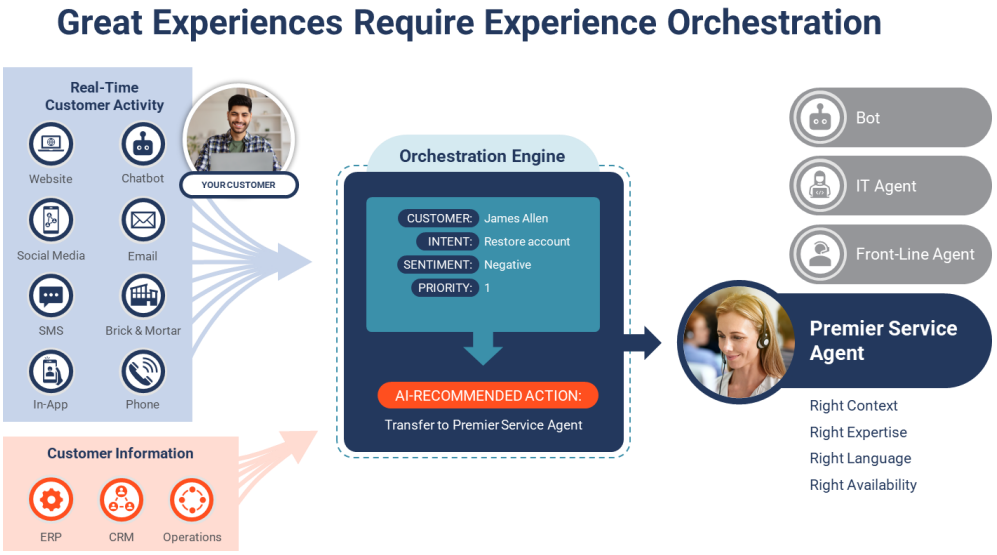
Additionally, we're proud signatories of Microsoft Partner Pledge, Better Business Act and Tech Zero initiatives, actively participating in industry-wide efforts to drive positive change. Our adherence to internationally recognised standards, including ISO 14001 (Environmental Management System) and ISO 26000 (Social Responsibility), reinforces our commitment to good governance and ethical conduct.

Why Genesys Cloud

Genesys Cloud™ is a leading Contact Centre as a Service (CCaaS) software offering, with over 1 million concurrent users globally and growing. Whether they be “Customers”, “Citizens”, “Residents” or “Patients”, Genesys helps organisations transform their respective relationships by orchestrating connected, personalised experiences so better relationships can be built whilst delivering improved and more efficient outcomes.

Genesys Cloud offers the most comprehensive set of native Customer Experience (CX), Employee Experience (EX), digital, Artificial Intelligence (AI), Unified Communications (UC) and more, in a single cloud platform enabling all services to work together automatically and seamlessly. This allows organisations to adapt and scale more easily, so every citizen experience can automatically scale beyond a single interaction, shaping journeys and empowering employees, to drive the most optimum outcomes and long-term success.

Through the real-time coordination of people, channels, interactions, knowledge, data, bots, and more, citizens will get a swift resolution to their issues whilst enabling a more engaged workforce. By coordinating every step of every experience for customers and employees through a single cloud CX platform, organisations can listen and understand to better predict actions and shape journeys – leading to a better engagement and better outcomes. With a modern, single, unified, and open platform, Genesys Cloud™ offers a full suite of omnichannel options, built-in Workforce Engagement Management (WEM), native, turnkey AI, and end-to-end journey optimisation, so customer experiences can be orchestrated at scale.



The image above shows real-time customer activity and information from your website, a chatbot interaction, social media, email, SMS, Buildings (Brick and Mortar), in-app and phone calls all as inputs into the orchestration of a customer. This is supplemented with customer information from your ERP, CRM and any operational systems. All these inputs are used to orchestrate the customer engagement and used to understand the customer, their intent and sentiment and through AI recommend an action. All this occurs in real-time. As shown in the diagram, the AI recommended action could be to route the call to a premier or specialised agent shown on the right-hand side of the diagram.

Organisations can purposefully design a customer’s entire journey that is as unique to them and then understand, measure, and optimise every step to improve critical KPIs and achieve the desired outcomes – all whilst reducing operational complexity and cost.

Here are six reasons why you should consider adopting the leading contact centre platform.

Grow without limitations
Genesys Cloud is built to scale. Its cloud-native architecture, methodologies and operations ensure

reliability and continuity during busy periods. And there's virtually no limit to the volume of customer demand it can handle. One of the world's largest cloud contact centres builds on the platform to empower its more than 30,000 peak agents to serve customers efficiently.

Using a load balancer, individual requests are distributed evenly across a given region. Free your IT team from architecting your system to handle peaks in demand. Enable them to make progress on transformative projects that position your company for future growth. And, as your business expands, you'll gain virtually unlimited reach across thousands of servers and data centres. Genesys Cloud is live in over nine locations and counting, including North America, Asia Pacific and Europe.

Rapidly deploy innovations

Succeeding in today's digital landscape means staying on top of innovations. This includes artificial intelligence (AI), new digital channels and workforce engagement tools. Deploying new features and capabilities to give you a competitive edge shouldn't disrupt systems or increase costs. Genesys Cloud offers the broadest and deepest set of capabilities in the market, and the list continues to grow.

Genesys Cloud developers continuously deploy small batches of enhancements without interruptions or downtime. So, customers see new features that can be launched with the click of a button, every week. This means rapid access to new functionality, including AI- powered tools that can create more fluid customer and employee journeys — without allocating resources from IT.

Bring your business units together

Integrating with existing systems should be easy. Your employees should have the right tools to get a full picture of the customer journey. With them, they can deliver the best possible customer experiences. Genesys Cloud works with systems that are on-premise or in the cloud. It lets you connect your custom or commercial systems and applications.

You can control how data is retrieved and synchronised between systems, how it's used in the platform and who can view it. Genesys Cloud smoothly brings the best of all worlds together, including:

- Voicebots
- Chatbots
- Webhooks
- CRM data actions
- Embeddable frameworks
- Single sign-on
- Third-party speech engine integrations.

Genesys AppFoundry Marketplace has more than 350 pre-built customer experience applications and integrations from industry-leading vendors and technology partners. You can integrate existing CRM solutions, workforce management tools and business intelligence systems. You can also introduce new capabilities like agent gamification, or enjoy one-click installation and free trials of premium apps.

Empower your teams with a simple way to configure workflows

Implementing new capabilities and functionality can be challenging with older call systems. Designing, creating and improving self-service tools requires specific skills and IT expertise. Your IT team can feel underutilised when they have to handle repetitive tasks. Operational efficiency might be affected as they devote time and attention to constantly reconfiguring software.

But the Genesys Cloud platform gives your frontline agents and managers autonomy and flexibility. They can design, create and automate workflows without calling IT. Contact centre managers can

design IVR workflows with an intuitive drag-and-drop editor. They can easily configure prompts, data dips, sub-menus and transfers to adapt to changing business needs. And easy webhook integrations let your teams consistently deliver timely updates through appropriate channels. By enabling your workforce to be self-sufficient, IT can focus on driving strategic initiatives.

Enable your developers to build exactly what you need

When more advanced modifications are required, the Genesys Cloud platform makes customisation easy. It's no problem to integrate with Salesforce or another CRM system. Your organisation's IT experts can build almost any custom integration and application. They can use any programming language, with the same fully secured and versioned Public REST API that was used to build the Genesys Cloud all-in-one solution. The API-first native-cloud platform handles more than 8 billion API requests monthly and scales as volume grows.

And if developers need extra guidance to build a custom customer service ecosystem, the Genesys Developer Centre has tutorials, documentation, knowledge articles and a developer community to help.

Safeguard your customers with the secure cloud solution

Your customer and business data is safe with Genesys Cloud. A dedicated team of security and privacy experts works hard to keep you and your customers protected from security breaches. The Genesys Cloud platform maintains strong encryption, logical isolation, stringent multi-tenant security standards and key certifications. You can comply with cloud-security best practices and data-privacy regulations — no matter your industry or location.

You can trust that you'll stay online and operational too. Genesys Cloud is deployed globally in multiple Amazon Web Services (AWS) regions. Within each region, Genesys Cloud microservices are spread across multiple AWS Availability Zones. This distributed architecture means that a failure in one zone, such as a power outage, doesn't cause the entire service to crash. Genesys Cloud provides visibility into SLAs, current system status, availability metrics and a history of incident resolutions across every service and region.

Service Information

Genesys Cloud-AI-Powered Experience Orchestration Platform

Genesys Cloud is a leading AI-powered experience orchestration platform trusted by businesses in over 100 countries. It helps organisations deliver seamless, personalised customer and employee experiences through AI-driven omnichannel engagement, intelligent routing, workforce engagement, and end-to-end journey management, all-in-one unified platform.

Genesys Cloud Architecture and Open Platform

Genesys Cloud is designed to assist customers in managing changes in a reliable, safe, and scalable manner. Its cloud-native architecture provides ongoing deployment of cloud technology developments. Customers can gain rapid access to important areas of innovation as they occur. Customers can future-proof their cloud contact center by exploring microservices, an API-first strategy, open data, and AI. Customers can also grow their Genesys Cloud application using Open APIs, which provide superior tools for navigating changes quickly and easily. The solution is easily expandable, allowing features and capabilities to be added as needed by the organisation.

The Genesys Cloud application services suite is built on a microservices architecture. Microservices architecture is a type of software architecture in which complex programs are made of small, independent processes that communicate with one another using language-independent APIs. As demonstrated in the graphic below, this provides clients with a set of targeted applications tailored to achieve a task or provide certain capabilities.

Genesys Cloud separates its functionality into services, each of which handles a specific sort of request, rather than employing numerous tightly coupled components. Each Genesys Cloud service distributes work using Elastic Load Balancers (ELBs); each grouping has multiple servers that scale dynamically based on load. We continuously analyse service-level traffic and optimise microservices based on use and request type.

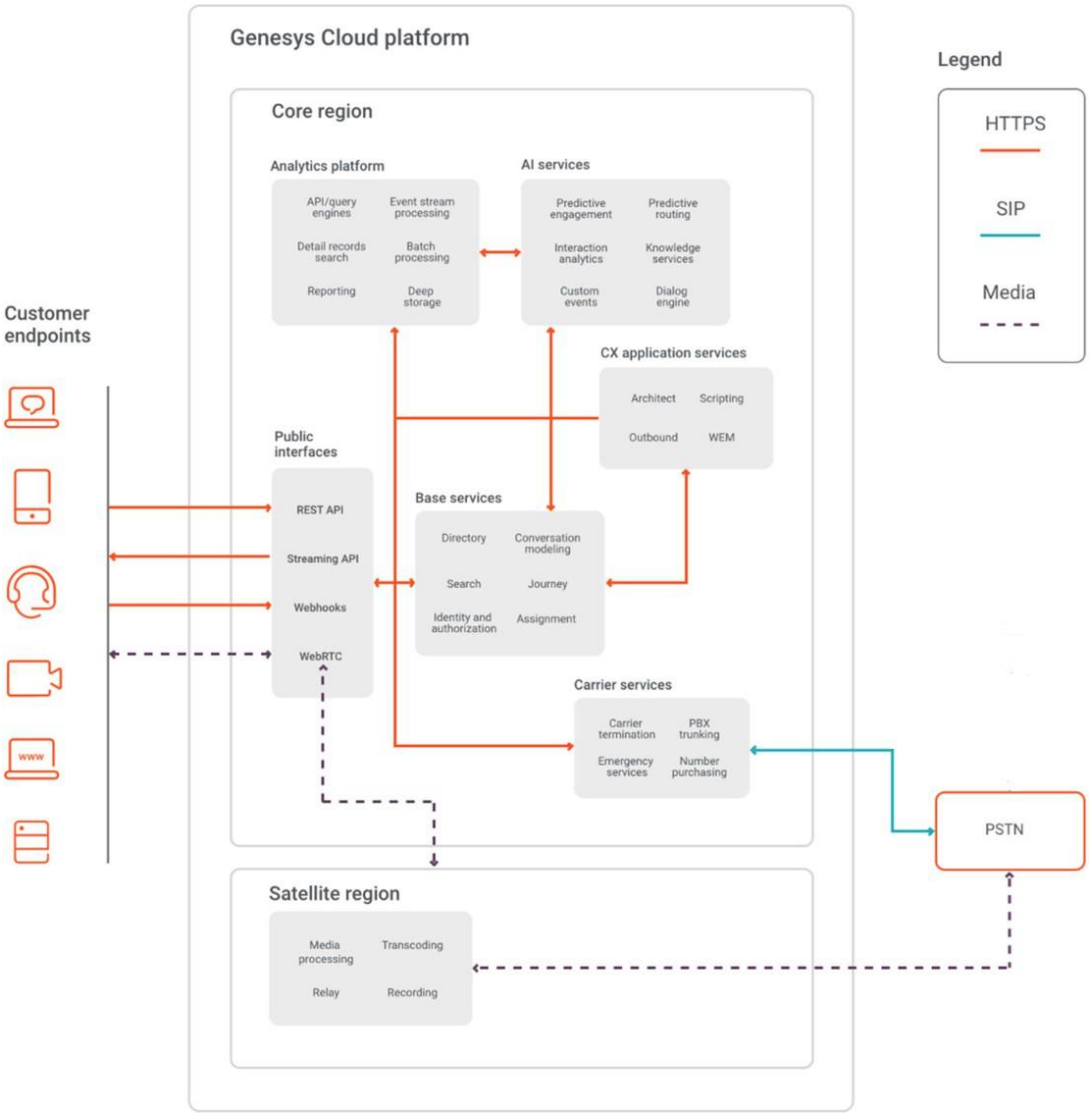


Figure 1: Genesys Cloud Platform

A single platform with endless possibilities

Genesys Cloud offers a unified, modern cloud architecture built on a single codebase with pre-integrated microservices for customer experience and workforce engagement. With open APIs, robust developer tools, native AI, and extensive integrations, it enables personalised, omnichannel experiences. Its no-code orchestration simplifies management, reduces tech complexity, and empowers all users to co-create unique experiences in real-time.

Key Benefits:

- **One platform, one codebase**: Minimise your tech footprint and ensure you are always available with a comprehensive set of pre-integrated microservices built into a single codebase.
- **Streamlined data aggregation and automation**: Inform orchestration and automation across your entire ecosystem using AI-ready data generated from any interaction or source.

- **Single no/low-code orchestration**: Rapidly accelerate the conversion of business and IT institutional knowledge into all aspects of your customer and employee experiences.
- **Effortless updates and new capabilities**: Stay ahead of evolving market shifts, business requirements and your competition with updates and new capabilities weekly.
- **Turnkey apps and integrations**: Add value in a few clicks with prebuilt functionality and connectors to other systems from an expansive marketplace.
- **Limitless extension**: Compose strategic value at scale with an API-first open platform and modern developer tools purpose-built to help you bring innovation to market fast.
- **Worry-free security and compliance**: Be confident that your customers' data (and their trust) remain secure and compliant, no matter where your operations are located.
- **Global footprint and flexibility**: Strengthen and expand your global footprint with unsurpassed coverage wherever you are or want to be.
- **Centralised administration and control**: Maintain consistent, scalable operations and guardrails across deployments of any size, location or operating model, in a single location and with a single login.

The Genesys Advantage

Unified, modern cloud architecture

Consolidate systems, reduce technical debt, and lower costs while delivering more connected experiences. Genesys Cloud offers the industry's most comprehensive native experience orchestration capabilities, all built on a single codebase for seamless integration. Its unified platform ensures maximum uptime, backed by a robust service-level agreement with up to a 100% credit guarantee.

Innovation at speed and scale

Customers can create differentiation within and beyond the contact center by aligning Genesys Cloud with your unique processes and use cases. With weekly updates, you gain continuous access to the latest innovations, enabling you to meet evolving customer expectations and adapt swiftly to changing business demands. Leverage 500+ prebuilt apps and integrations from trusted partners and tap into 3,000+ APIs to extend and connect virtually every part of the platform.

Global reach and Local presence

Deliver secure, always-on operations that build brand trust across every location. Our shared security model layered data protection, and broad portfolio of global compliance certifications reduce your operational burden while exceeding the security standards most organisations can achieve on their own. Services are available in over 105 countries, powered by a globally distributed network of core and satellite regions.

Genesys Cloud CX 1 Overview

Genesys Cloud ACD: Intelligent, AI-Driven Routing for Better CX

Genesys Cloud transforms traditional routing with an AI-powered Automatic Call Distribution (ACD) that optimises every inbound interaction. By eliminating rigid skill-based rules and enabling dynamic, data-driven decision-making, it helps reduce average handle time and improves first-contact resolution, delivering a consistently better customer experience.

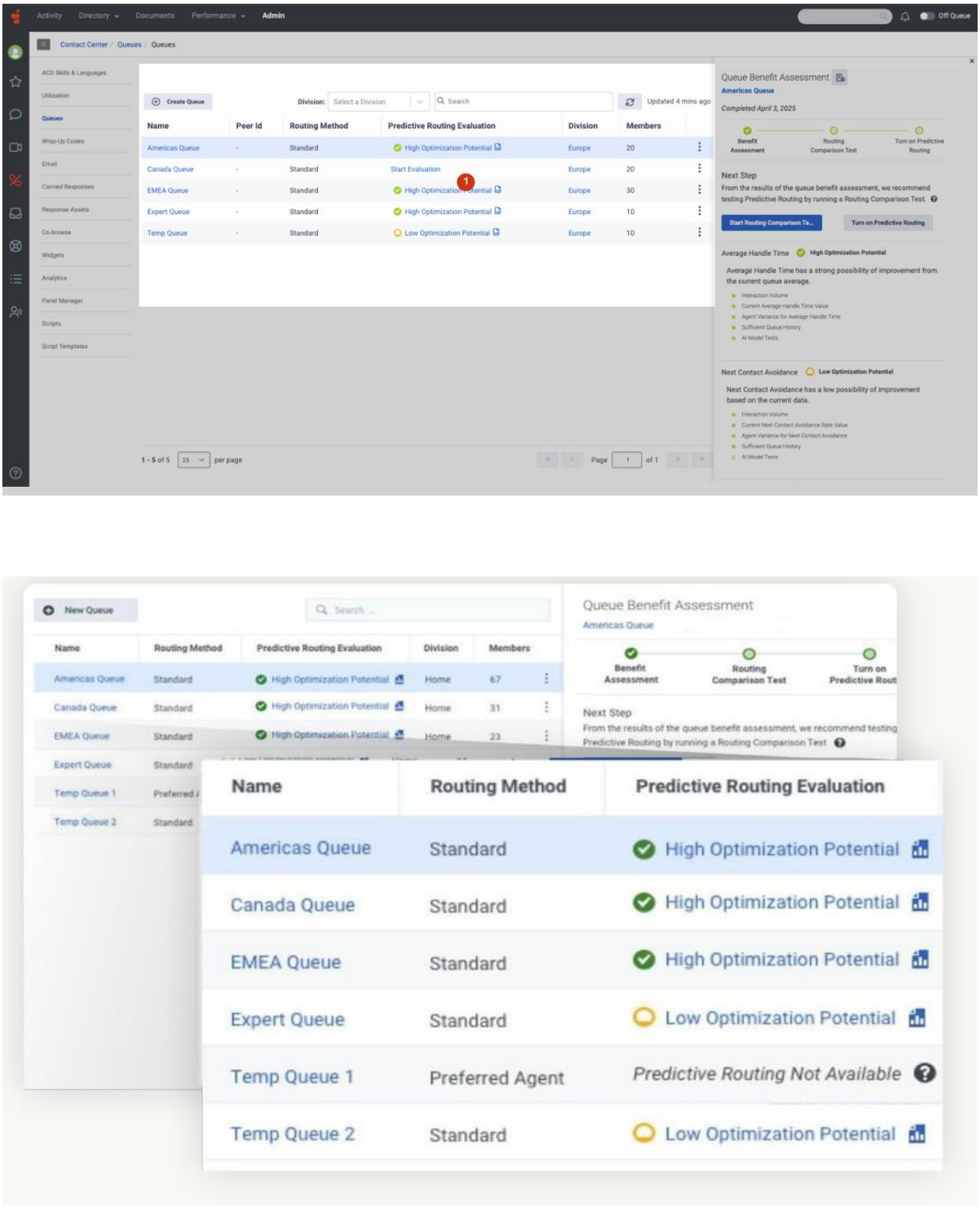


Figure 2: ACD Call Routing and Evaluation Method

Key Capabilities

- **AI-Driven Routing**: Leverage behavioral data and AI insights to route interactions based on optimal agent-skill combinations.
- **Dynamic Agent-Queue Assignment**: Use real-time skills and proficiency expressions for precise agent matching and easier admin.
- **Flexible Routing Models**: From basic idle-agent routing to advanced skills-based, bullseye, preferred-agent, and conditional routing options.
- **Data-Enhanced Decisions**: Incorporate CRM and back-end system data for intelligent segmentation, prioritisation, and personalisation.
- **Unified Omnichannel Engagement**: Seamlessly route voice, chat, email, messaging, and social media interactions through one system. (Chat, Email, Messaging, social media etc. requires additional licenses.)
- **Developer-Friendly Customisation**: Extend and tailor routing logic using APIs, expressions, and external data sources.
- **Remote-Ready Virtual Contact Center**: Support distributed teams with centralised routing, unified queues, and easy scalability.

Genesys Cloud IVR: Smarter Self-Service with Conversational AI

Deliver seamless, personalised self-service experiences with Genesys Cloud IVR. Powered by natural language understanding (NLU) it enables intelligent Voicebots to handle customer interactions naturally and hand off to live agents with full context when needed.

Key Capabilities

- **Conversational IVR:** Use AI-driven Voicebots to understand natural speech and route calls intelligently.
- **Omnichannel Self-Service:** Design once, deploy across voice, web, messaging, and SMS, maintaining full context throughout. (Additional licenses are required.)
- **Drag-and-Drop Journey Builder:** Easily create and manage IVR flows without coding using a visual editor with error checking.
- **Speech and DTMF Input:** Offer intuitive, flexible navigation through speech recognition and touch-tone options.
- **Personalised and Adaptive Routing:** Tailor menus, messages, and flows based on customer identity, intent, and journey history.
- **Customer Identification:** Verify users automatically and pass context to agents, reducing repetition and call times.
- **Pre-Built Apps and Visual IVR:** Accelerate deployment with reusable, multilingual components and touchscreen-friendly interfaces.
- **Open API Support:** Extend and customise IVR logic with integrations and centralised data management.

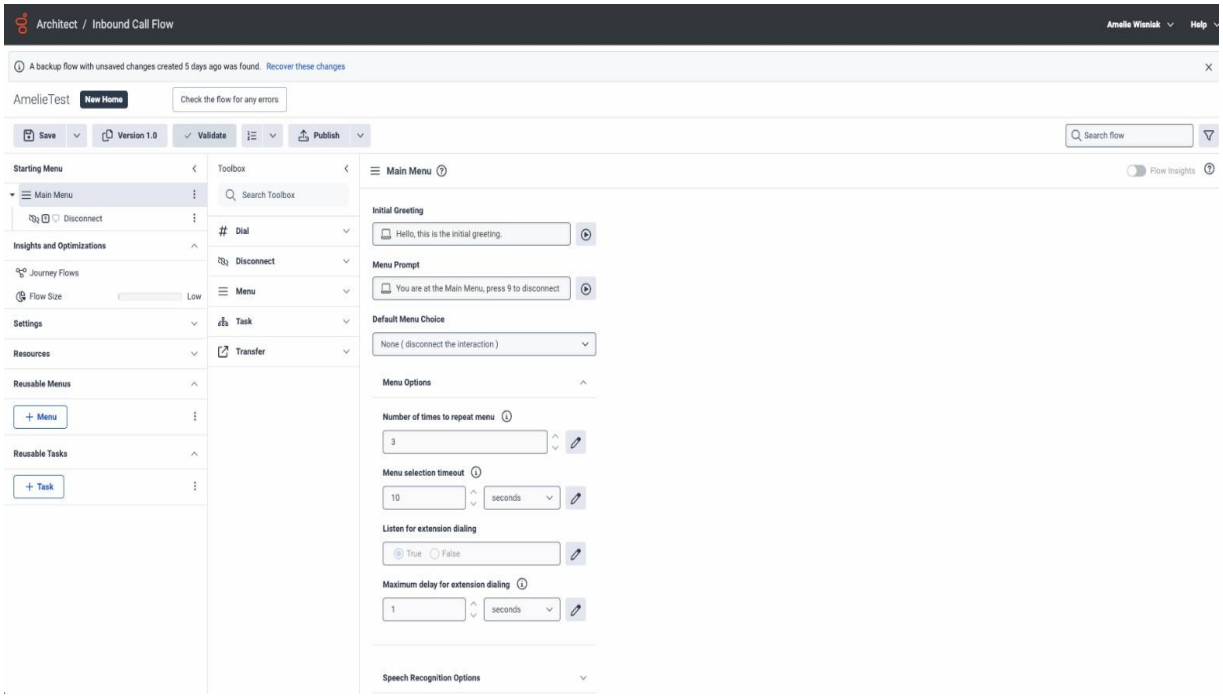


Figure 3: Genesys Cloud Architect Inbound Flow

Genesys Cloud Outbound Engagement: Proactive, Personalised, and Compliant

Enhance your customer outreach with AI-powered outbound campaigns that combine voice and digital channels for efficient, proactive engagement. Genesys Cloud enables self-service and agent-assisted interactions across the customer journey, all from a single platform.

Key Capabilities

- **AI-Driven Campaigns:** Use bots and automation to maximise reach and reduce costs across low-touch digital and voice channels. (Additional license is required for Digital features.)
- **Proactive Notifications:** Automatically send personalised alerts for appointments, order updates, renewals, and more.
- **Omnichannel Outreach:** Engage customers on their preferred channels — including voice, SMS, email, and messaging apps.
- **Unified Inbound & Outbound:** Manage all interactions on one platform to deliver seamless, consistent experiences and insights.
- **Journey-Based Personalisation:** Orchestrate outreach based on behavior, preferences, and lifecycle stage to boost relevance and response.
- **Built-in Compliance Tools:** Ensure regulatory compliance with audit logs, consent management, suppression lists, and contact rules.
- **Open APIs & Pre-Built Integrations:** Easily connect CRM systems and third-party tools to customise campaigns without IT reliance.
- **Advanced List & Campaign Management:** Design, launch, and adapt campaigns quickly with role-based admin tools and integrated analytics.

- **Intelligent Detection & Verification:** Improve contact rates with pre-call validation and accurate detection of live answers vs. machines.

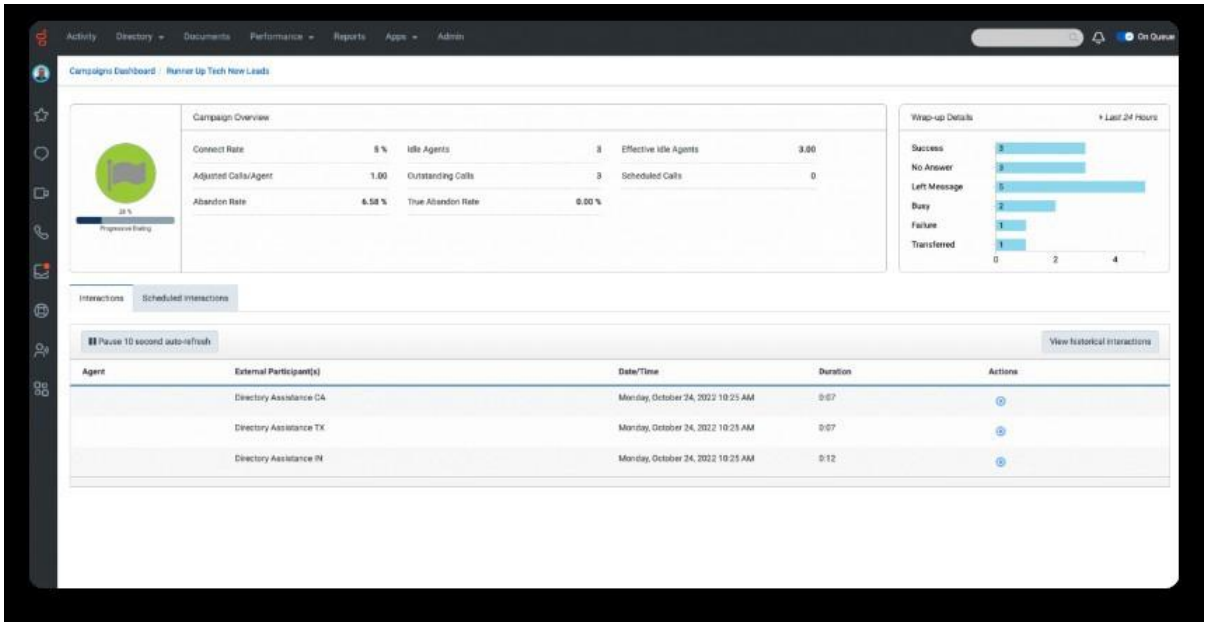


Figure 4: Campaigns Overview

Genesys Cloud Analytics: Real-Time, Actionable Insights That Drive Results

Genesys Cloud empowers contact centers with real-time and historical analytics across voice and digital channels, helping businesses optimise performance, improve experiences, and make faster, data-driven decisions. (Additional license is required for Digital Channels.)

Key Capabilities

- **Real-Time & Historical Reporting:** Monitor queues, agent activity, campaign performance, topics, skills, and languages with live dashboards and detailed historical views.
- **Custom Dashboards & Views:** Build tailored workspaces with pre-built and customisable widgets for easy access to key metrics.
- **Actionable Analytics UI:** Intuitive tools allow supervisors to monitor interactions, adjust staffing, and provide coaching in real-time.
- **Alerts & Notifications:** Set up custom, multi-condition alerts for performance, presence, or queue changes, delivered via app, SMS, or email.
- **Data Access & Integration:** Export data via APIs, EventBridge, and AppFoundry apps. Leverage Analytics as a Service (A3S) for extended reporting and external data integration. (Additional license is required.)
- **AI-Powered Insights:** Use speech and text analytics, sentiment detection, intent mining, and predictive outcomes to uncover meaningful trends and optimise bots, routing, and service. (Additional license is required.)
- **Employee Performance Tools:** Give agents access to performance dashboards, journey insights, and customer context for better service delivery.

- **Enterprise-Grade Support:** Ensure secure, reliable operations with 99.99% uptime and full compliance with global standards including GDPR, HIPAA, and SOC 2.

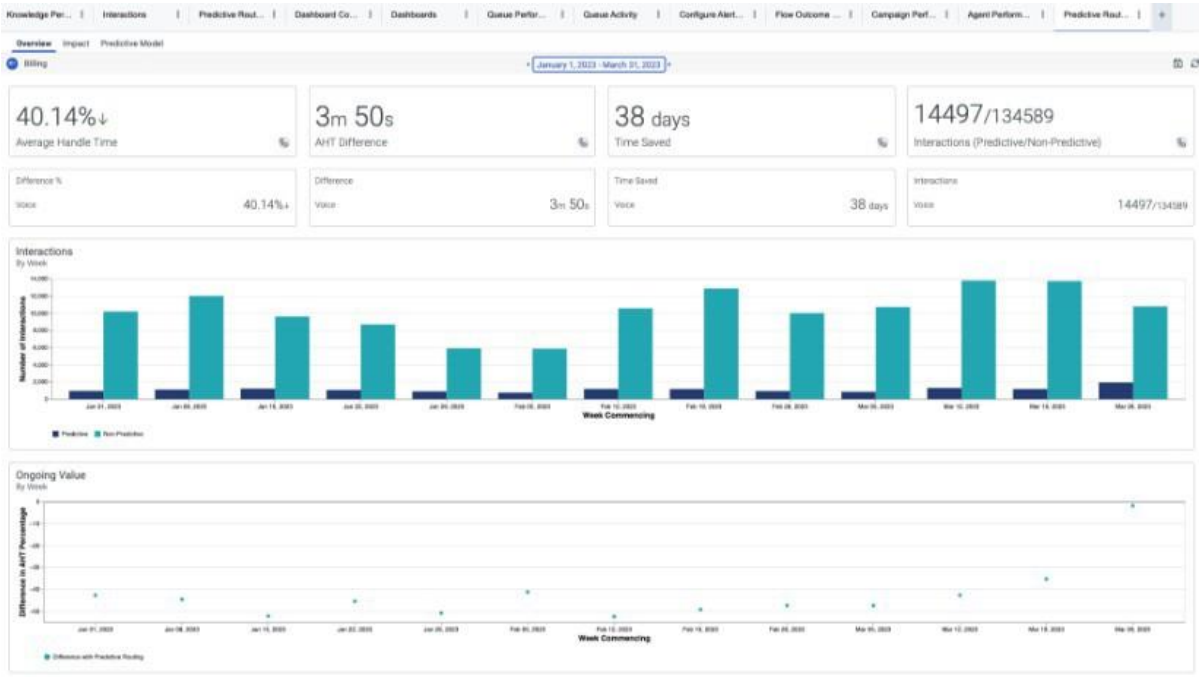


Figure 5: Analytics and Reporting

Genesys Cloud: Unified Communications and Collaboration Made Simple

Enable seamless collaboration across your organisation by integrating unified communications (UC) with your contact center operations. Genesys Cloud empowers agents and employees to connect, share information, and resolve customer issues faster, from anywhere.

Key Capabilities

- **Integrated Collaboration:** Break down silos between contact center teams and the broader organisation with unified directories, real-time presence, and click-to-connect voice, video, or chat.
- **Work from Anywhere:** Support flexible work with cloud-based apps for web, desktop, and mobile, keeping teams connected and productive.
- **Native or BYO UC:** Use Genesys-native UC tools or integrate with platforms like Microsoft Teams and Zoom via pre-built adapters. (Additional license is required.)
- **Consolidated Desktop Experience:** Give employees a single, intuitive interface to streamline collaboration and reduce onboarding time.
- **Persistent Chat & Group Messaging:** Enable department-level or project-based collaboration with searchable chats, file sharing, and easy escalation to calls or videos.
- **HD Video Meetings:** Facilitate rich, real-time communication with built-in screen sharing for team huddles or customer escalations.
- **Flexible Telephony Options:** Choose Genesys voice services or bring your own carrier for secure, reliable connectivity.

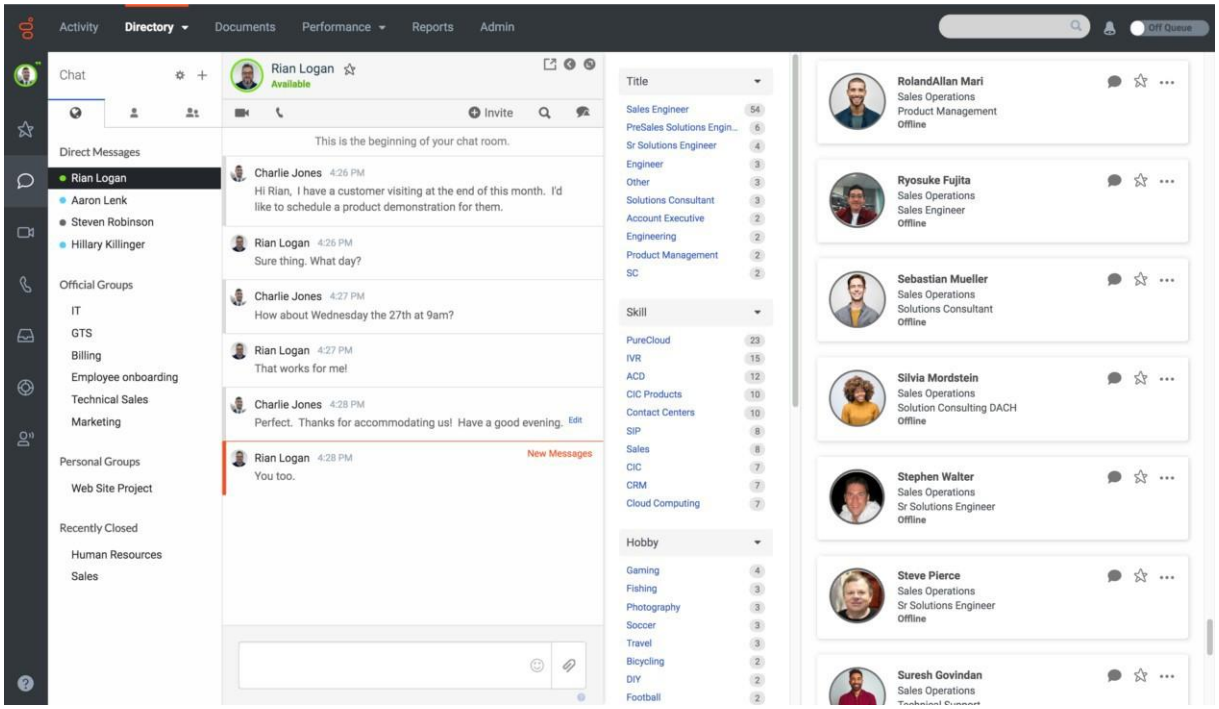


Figure 6: Unified Communication & Collaboration

Genesys Cloud Quality Management: AI-Driven Insights for Continuous Improvement

Genesys Cloud empowers organisations to elevate service quality and agent performance through comprehensive recording, AI-driven analytics, and automated quality management, all while ensuring compliance and data security. However, with a GC1 license, real-time monitoring and interaction recording and screen cecording will be delivered.

Key Capabilities

- **100% Interaction & Screen Recording:** Capture every customer interaction and agent desktop activity across all channels in high fidelity, with secure pause, consent, and redaction features.
- **AI-Powered Quality Evaluations:** Use AI to automate scoring, reduce bias, and identify coaching opportunities. Policy-based workflows streamline evaluations at scale. (Additional add-on license is required.)
- **Conversational Intelligence:** Gain deep insights from speech and text analytics, including sentiment analysis, intent mining, empathy detection, and trend tracking. (Additional tokens are required.)
- **Real-Time Supervisor Tools:** Monitor live interactions, coach via whisper or barge-in, and respond instantly to performance issues.
- **Voice of the Customer (VoC):** Collect and analyse feedback through post-interaction surveys and AI insights to improve CX and reduce churn. (Additional add-on license is required.)
- **Secure Data Ownership & Compliance:** Ensure end-to-end encryption, customisable retention, and full regulatory compliance (e.g., GDPR, HIPAA) with enterprise-grade security tools.
- **Automated Exports & Integrations:** Retain full ownership with automated bulk exports to cloud storage and seamless integration with external analytics tools.



Figure 7: Playback recordings

Business Value of Genesys Cloud CX1

Call Routing: Genesys Cloud ACD simplifies routing while enabling powerful customisation and intelligence. It boosts agent productivity, enhances customer satisfaction, and reduces operational overhead, all within a single, unified platform that supports rapid innovation and omnichannel customer engagement.

Self-Service IVR: Genesys Cloud IVR elevates self-service with intelligent automation and easy configuration. It improves containment, reduces operational costs, and enhances both customer and agent experiences, all within a flexible, modern platform built for omnichannel engagement.

Outbound: Genesys Cloud outbound engagement empowers businesses to deliver timely, relevant communications that drive action. By unifying outbound and inbound operations, you improve campaign effectiveness, enhance customer satisfaction, and maintain full compliance, all while reducing operational costs and complexity.

Analytics & Reporting: Genesys Cloud analytics turns data into actionable insights, helping leaders resolve issues faster, optimise resource allocation, improve customer satisfaction, and drive better outcomes. With flexible tools and AI-driven intelligence, your contact center can continuously adapt, perform, and thrive.

Unified Communication: Genesys Cloud unifies UC and contact center capabilities into a single, scalable solution. It enhances agent productivity, improves cross-team collaboration, and simplifies your communications infrastructure, all while supporting modern, hybrid work environments.

Interaction Recording: Genesys Cloud monitors and coaches in-progress interactions without disturbing the conversation. It also records conversations with agent screen recording in 4K better Quality. It transforms quality management from a compliance requirement into a strategic asset. With AI-enhanced evaluations and actionable insights across channels, you can continuously optimise agent performance, improve customer satisfaction, and drive operational excellence, all within a secure, scalable platform. However, additional licenses are required for automatic quality evaluation.

Note: All Genesys Cloud plans are natively enabled with ready-to-use Genesys Cloud AI capabilities. However, Genesys Cloud AI Experience tokens are required for certain features. 250 named / 350 concurrent tokens per org/month included in Genesys Cloud CX for voice contact centers license.

Following are the Add-on and Token based features available for the customers to leverage:

Add-on: Digital channels, Omnichannel routing, Workforce engagement management, Speech and text analytics, Predictive engagement, Knowledge workbench, Knowledge optimiser, Web messaging, email and SMS, Third-party messaging, Social listening and engagement, Co-browse, Employee performance, Workforce management, Quality management and evaluations, Voice of the customer, CRM and case management integration, Unified communications and collaboration integration, Proactive notifications, Agentless API, Custom reporting and data visualisations, and Journey management.

Tokens: Virtual agents, Native bots, Predictive routing, Agent Copilot, AI-guided scripts and flows, Enhanced post-interaction summaries, Automatic knowledge surfacing and answer highlighting, Speech and text analytics, Supervisor Co-pilot, Virtual Supervisor and Conversational intelligence.

Genesys Cloud CX 2 Overview

Genesys Cloud CX 2 delivers a fully integrated, omnichannel contact-center platform with built-in quality assurance and compliance. A single, unified interface empowers agents, supervisors, and administrators to onboard, manage, and optimise customer and employee experiences at scale.

Unified Workspace

- **Single Pane of Glass:** One intuitive interface for agents, supervisors, and admins — accelerating training and simplifying day-to-day operations.
- **Mobility Apps:** Tempo mobile app support for on-the-go engagement and management.

Omnichannel Engagement

- **Voice:** Inbound/outbound calls, IVR with speech enablement, ACD routing, callback, scheduled callback, and inbound/outbound blending.
- **Digital Channels:** Web chat, email, SMS, and third-party messaging (WhatsApp, Facebook Messenger, Twitter, LINE, Instagram).
- **Proactive Outreach:** Campaign-based SMS/email/voice notifications and agentless API-driven alerts.

Intelligent Routing & Automation

- **Skills-Based & Omnichannel Routing:** Advanced queue management, priority routing, and blending across voice and digital.
- **Architect Flow Automation:** Drag-and-drop call and message flows, data-action integrations, and bot orchestration.

Quality Assurance & Compliance

- **Interaction & Screen Recording:** Capture voice and digital interactions alongside agent desktops for full context.
- **Real-Time Monitoring:** Supervisor whisper/barge, live dashboards, and alert thresholds.
- **Quality Management:** Evaluations, calibration, and coaching workflows to uphold service standards.

Analytics & Reporting

- **Real-Time Dashboards:** Live KPIs across channels, agents, and queues.
- **Historical Reports:** Prebuilt and custom reports, with exportable data.
- **Customisable Performance Views:** Agent, team, and campaign metrics in self-service dashboards.

Extendibility & Ecosystem

- **AppFoundry Marketplace:** Prebuilt integrations for CRM, WFM, and AI partners. A full list of AppFoundry Marketplace applications can be found here and are available through G Cloud.
- **APIs & SDKs:** Full access to REST APIs, Webhooks, and client SDKs for bespoke extensions.

- **Text-to-Speech (TTS):** Seamless connection to TTS engines.

Genesys Cloud Digital Engagement

Genesys Cloud CX2 is a unified digital customer-service platform that empowers seamless, omnichannel engagement—across chat, email, SMS, social messaging, and voice—with token-based AI and embedded bots for proactive, predictive interactions. A single, intuitive agent workspace consolidates journey visualisation, interaction history, and knowledge-based insights, while automated workflows and AI-driven routing ensure customers connect with the right resource at the right time. Rich media elements, asynchronous conversations, and real-time notifications enhance CX, and built-in analytics and reporting deliver live KPIs and historical insights to continuously refine experiences, strengthen loyalty, and accelerate digital transformation at scale.

Unified Email Management for Omnichannel Excellence

Key Capabilities

Centralised Interface for Seamless Email Handling

Integrate customer email interactions into a single omnichannel interface to provide consistent, high-quality customer experiences. Enable agents to access and search cross-channel interactions, enhancing their understanding of customer needs, improving resolution speed, and maximising the value of each email.

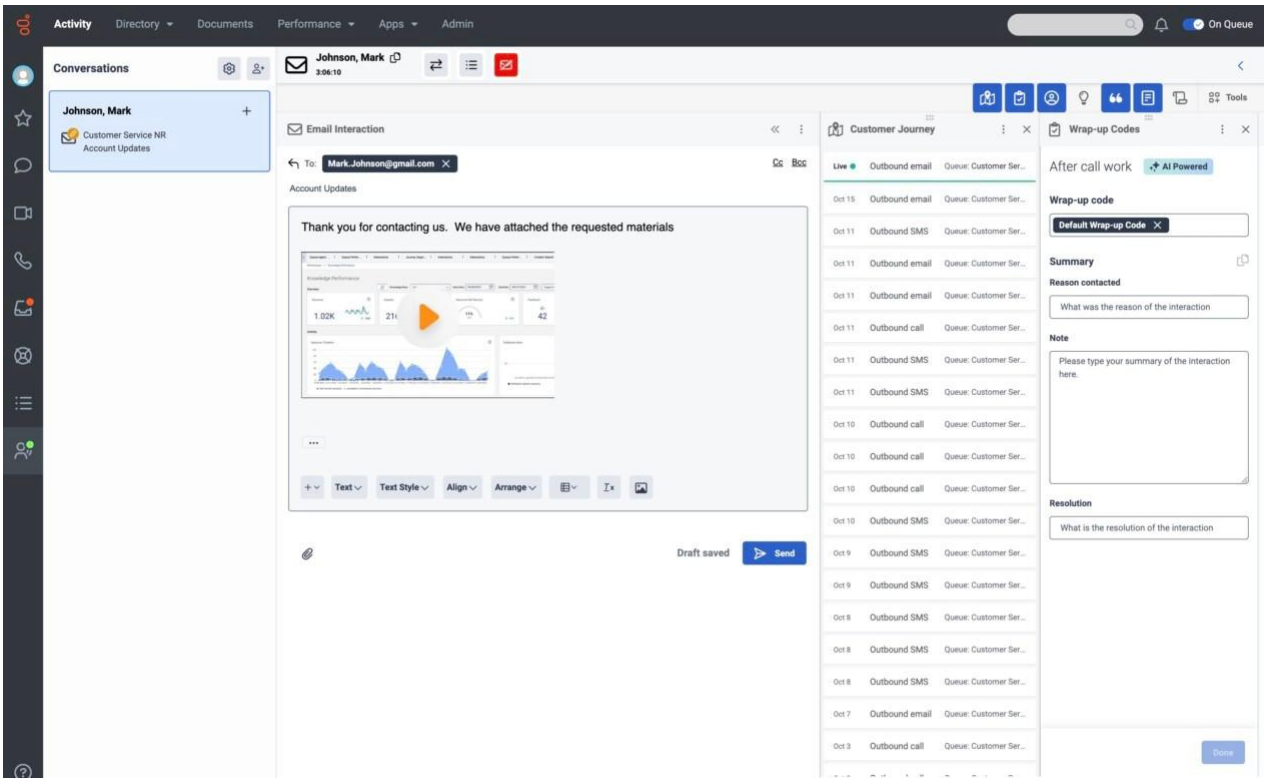


Figure 8: Centralized Interface

Efficient Navigation of High Email Volumes

Ensure email distribution visibility and maintain service-level agreements with business-rule-driven routing. Prioritise and assign emails effectively to the right agents, enabling balanced workloads, reduced operational costs, and faster resolution times.

Data-Driven Improvements with Real-Time Insights
Leverage centralised analytics for both historical and real-time performance across all channels. Identify patterns, uncover issues, and evaluate email performance using actionable insights to continually elevate customer experiences.

Intelligent Email Routing and Management

Advanced Categorisation and Prioritisation
Automatically capture, classify, and route email messages using configurable business rules. Prioritise interactions based on predefined criteria such as customer profile or value.

Robust Reporting Capabilities
Monitor key performance indicators (KPIs) through comprehensive real-time dashboards and historical reports. Gain insight into performance trends by segment or agent to optimise engagement strategies.

Enhanced Email Composition Tools
Support rich formatting options including inline images, custom text styles, and dynamic email signatures for professional, branded responses.

Standardised and Editable Canned Responses
Maintain consistency and accelerate reply to times with reusable response templates. Agents can customise responses and insert commonly used media with minimal effort.

Customisable "Mail From" Domains
Use branded email domains to align with authentication protocols and improve email deliverability and trustworthiness.

Spam Protection and Security Controls
Automatically block unwanted senders and manage spam with customer-defined rules. Built-in virus detection ensures safe handling of email content.

Proactive Communication and Agent Support

Outbound Campaign Management
Launch personalised, rule-based email campaigns. Manage contact lists, segment audiences, and build dynamic templates and schedules for precise and timely outreach.

Consistent Customer Journeys
Provide agents with a complete view of customer history across channels, ensuring context continuity and synchronous experiences via threaded email conversations.

AI-Driven Agent Assistance (Token based)
Equip agents with contextual, AI-powered guidance drawn from enterprise knowledge bases. Accelerate training and reduce escalations by enabling informed responses across topics.

Agentless Notifications
Automate transactional email notifications such as order confirmations or appointment reminders — without involving contact center agents.

Delivery and Engagement Tracking
Monitor delivery receipts and engagement metrics for campaign and notification emails. Evaluate effectiveness and refine outreach strategies based on actionable data.

Supervisor Controls and Agent Experience Enhancements

Supervisor Management Tools
Empower supervisors with real-time visibility into email queues and workloads. Manually assign emails or utilise alternative routing strategies as needed for optimal distribution.

Expanded Agent Toolset
Allow agents to revisit and respond to closed interactions, manage multiple actions per email, and park email exchanges. Admins gain deeper insight through dedicated metrics, such as average parking time.

Unified Interaction Handling
Treat email as a native channel within the omnichannel ecosystem, just like calls, chats, SMS, and social media. Consolidate all customer interactions into a single interface for streamlined case handling.

Intelligent Email Routing
Leverage the existing routing engine for email delivery, applying the same rules used for voice and digital channels. Route based on agent skills, language, keywords, availability, CRM data, and multiple recipient contexts.

Optimised Agent Workflows
Balance interaction loads across media types. Configure agent thresholds, manage channel prioritisation, and control signature and email history settings, all while preserving full interaction context.

Comprehensive Email Performance Analytics
Drive continuous improvement with unified email analytics. Centralised dashboards deliver visibility into trends and KPIs, enabling organisations to refine their support strategies and knowledge assets using real-time and historical insights.

Engage and Convert with Intelligent Web Messaging

Key Capabilities

Proactive Engagement Through Contextual Triggers
Deliver personalised, empathetic messaging by initiating conversations based on real-time web activity, customer behaviors, and agent availability. Reach customers at the right moment to increase engagement and conversions.

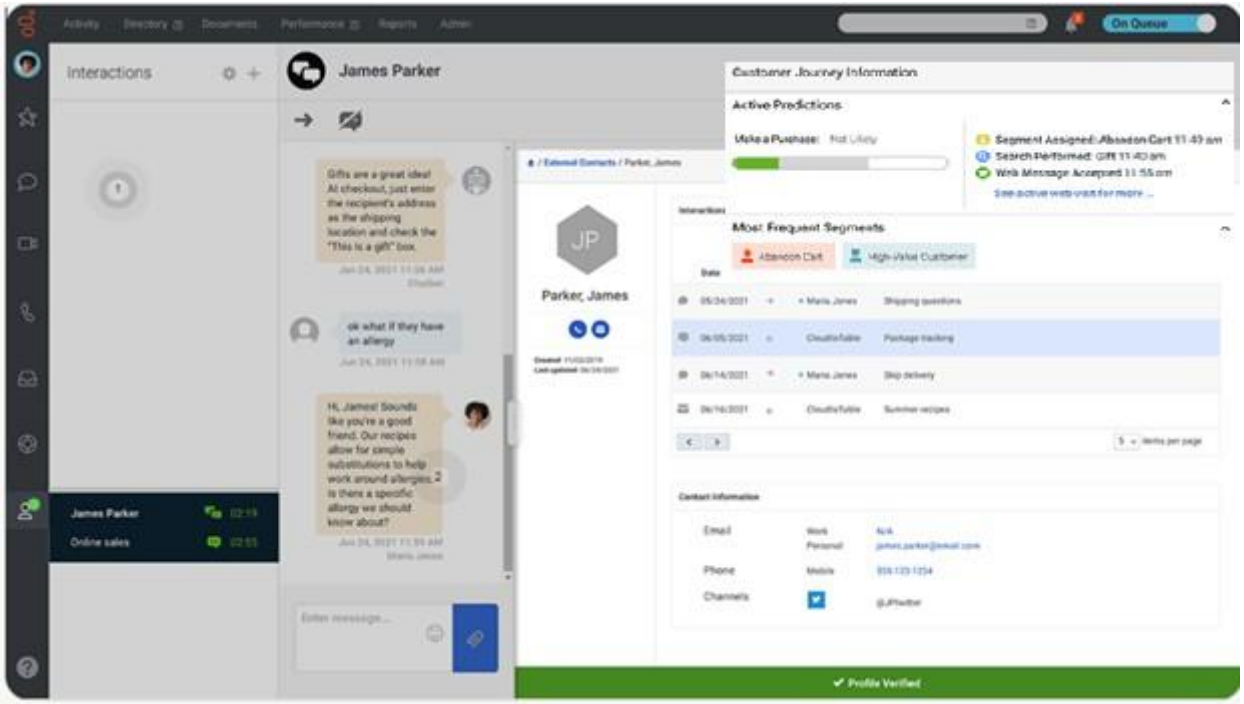


Figure 9: Proactive Engagement

Persistent, Asynchronous Conversations
Empower customers to interact on their own terms anytime, across devices without losing the thread. Conversations persist even when users navigate away or return later, eliminating the need for repetition.

AI-Powered Bots for Seamless Automation (Token Based)
Automate common tasks and guide visitors with AI-driven bots. Tailor conversation flows using a proprietary knowledge base or escalate to live agents effortlessly for more complex inquiries.

Rapid Setup with No-Code Customization
Deploy a fully functional web messaging widget in minutes. Update the experience visually and functionally with low-code or no-code tools no IT resources required.

Rich, Interactive Messaging Experience
Enhance user engagement with interactive elements like quick replies, carousels, emojis, file attachments, and cards enabling fast and intuitive resolution of inquiries.

Unified Omnichannel Agent Workspace
Allow agents to seamlessly manage interactions across web messaging, SMS, and social channels from a single, consolidated interface, ensuring consistent and informed customer engagement.

Secure, Authenticated Messaging Sessions
Identify and authenticate users at the start of a web messaging session across any browser. Enable agents to personalise interactions with full visibility into verified customer profiles.

Co-Browsing for High-Touch Support
Elevate customer support by enabling agents to view and navigate customer screens in real-time. Transition seamlessly from messaging to co-browsing for hands-on guidance.

Scalable, Secure, and Seamless Communication

Integrated Omnichannel Messaging
Incorporate web messaging into your broader omnichannel strategy. Agents can move effortlessly between channels within a unified platform, maintaining context throughout. Automate repetitive interactions to reduce costs and give administrators the tools to design business logic and integrate third-party tools with ease.

Real-Time Conversations Triggered by Business Intelligence
Initiate timely customer interactions using triggers based on web behaviors, user segmentation, or customer profile data. Unlike traditional live chat, web messaging provides full visibility into the entire journey and history empowering agents to guide users through complex tasks, with co-browsing available as needed.

Pause and Resume Across Devices
Let customers pause and pick up conversations at their convenience, even across multiple devices or after navigating away from your website. Ensure a frictionless, continuous experience for both agents and customers, with support for diverse media content.

Enterprise-Grade Security and Data Protection
Protect customer and business data with end-to-end encryption using HTTPS and TLS protocols. Sensitive data is automatically masked during co-browse sessions. Authenticated web messaging ensures only verified users can initiate sessions and resume them securely from any device or browser — supporting both security and seamless experience.

Engage Customers Effortlessly with Intelligent SMS Messaging

Key Capabilities

Inbound SMS with Rich Media Support
Enable customers to initiate seamless, multimedia-rich conversations. Agents can receive images in formats such as .jpg, .gif, and .png, allowing for more contextual and visually supported customer interactions.

Proactive and Informative Outbound SMS
Use SMS to keep customers informed and engaged from promotional messages and appointment reminders to school closures and urgent notifications. Deliver timely, relevant updates that strengthen trust and communication.

Flexible SMS Routing Options
Route SMS messages intelligently based on agent skills, availability, message content, and more. Leverage native Genesys routing or integrate your preferred provider with Bring Your Own (BYO) SMS options to maintain flexibility.

Unified Agent Experience and Global Availability

Omnichannel Agent Interface
Empower agents with a unified interface that consolidates SMS with other digital channels like email, chat, and social media. Threaded SMS conversations and access to historical transcripts allow agents to respond efficiently and maintain conversation continuity.

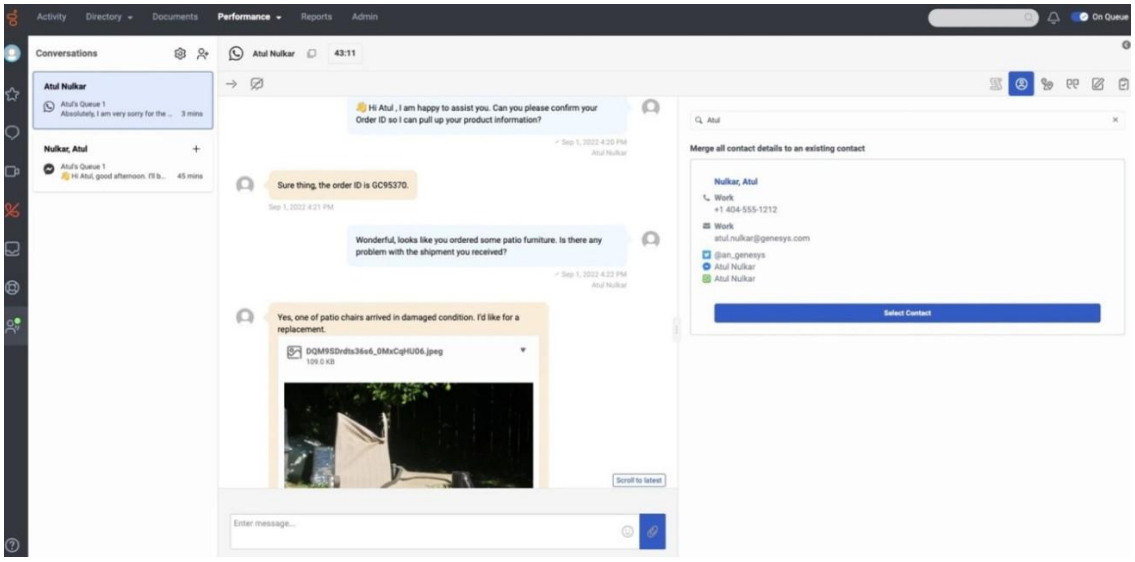


Figure 10: Omnichannel Agent Interface

Around-the-Clock Support with Localised Reach
Provide 24/7 support using familiar, local SMS numbers tailored to your customers' regions. Ensure customers can connect when it is convenient for them and allow agents to resume conversations at any time with full context.

Rich Media Use Cases with MMS Support
Enhance engagement and resolution speed with multimedia messaging (MMS). Enable both inbound and outbound sharing of rich media such as images and videos including proactive visual updates to make customer communications more engaging.

Performance Monitoring and Insight-Driven Optimization

Quality Monitoring and Coaching
Record all SMS interactions to maintain service quality and consistency. Use interaction data for coaching, quality evaluations, and workforce forecasting to continuously improve support.

Comprehensive Reporting and Real-Time Analytics
SMS data is integrated directly into reporting dashboards, providing real-time and historical visibility. Admins can track performance, configure alerts for threshold breaches, and make data-informed decisions to optimise operations.

Text Analytics and Customer Insights
Uncover customer needs and sentiments using text analytics. Identify trends, track conversation purposes, and analyse agent responses to refine best practices and improve future engagement strategies.

Scalable, Consistent, and Contextual Experiences

Seamless Experience Across Channels
Manage SMS conversations within the same interface as other digital channels. Agents retain context for continued conversations, resulting in more personalised and efficient interactions.

Consistent Support Anytime, Anywhere
Allow customers to engage on their own terms, knowing they will receive reliable and consistent service. Agents can respond promptly with the context they need, regardless of when or where the interaction began.

Data-Driven SMS Management
Track and analyse SMS channel performance alongside other digital channels. Configure alerts, monitor key metrics, and access actionable insights empowering administrators to optimise engagement and operational outcomes.

Deliver First-Class Customer Service Through Social Media Channels

Key Capabilities

Fast, Effective Customer Support on Social Platforms
Meet rising customer expectations for speed and responsiveness by integrating social media into your contact center. With native support for direct messaging and public posts, agents resolve issues quickly and efficiently, providing timely support across channels customers use every day.

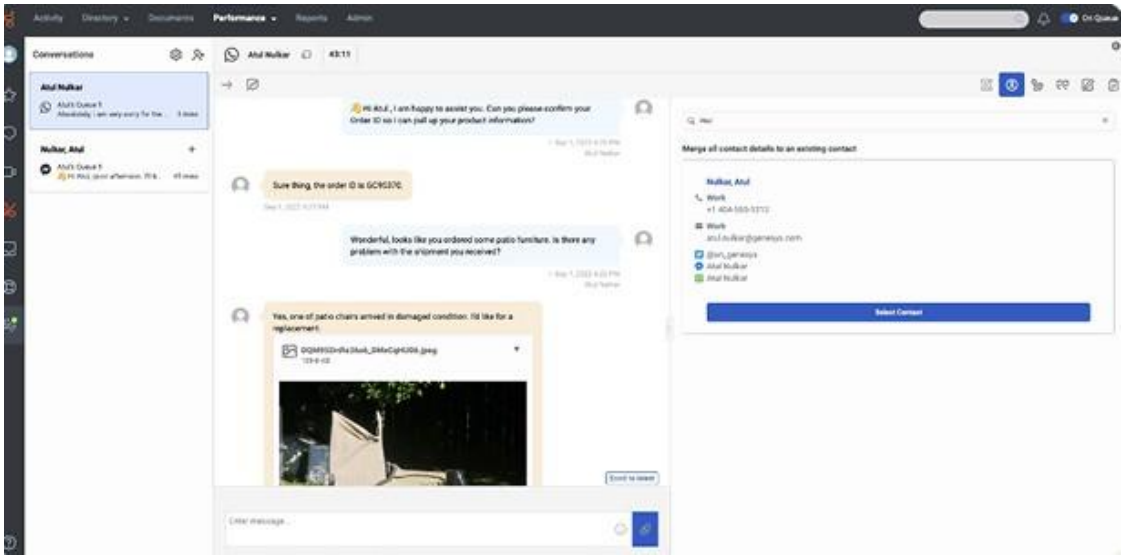


Figure 11: Fast, Effective Customer Support on Social Platforms

Meet Customers Where They Are
Support customers on their preferred platforms including Facebook Messenger, Instagram, WhatsApp, X (formerly Twitter), Apple Messages for Business, and more — using seamless integrations through Genesys and AppFoundry Marketplace partners. This multichannel accessibility enhances your brand's approachability and reach.

Automate and Optimise for Efficiency (Token Based feature)
Simplify repetitive interactions with AI-powered workflows and automation, reducing costs and improving speed. Utilise features like suggested responses, auto-answer, and sentiment detection to enhance agent productivity and ensure high-quality service delivery.

Deep Integration and Intelligent Social Routing

Unified Customer Journey Visibility (Token Based feature)
Bring social media interactions into the same interface that manages calls, emails, SMS, and chats. Maintain a comprehensive view of customer history and ensure seamless transitions across channels with threaded conversations and auto-summarised transcripts.

Social Listening and Sentiment Analysis (Add-on License required)
Use AI to monitor public social content by tracking keywords, hashtags, and mentions. Sentiment and actionability analysis helps prioritise urgent or high-impact messages, which are then routed to agents through standard queues for timely engagement.

Flexible, Skill-Based Routing
Ensure social media messages reach the most qualified agent using skill, language, keyword, priority, or AI-led routing strategies like Genesys Cloud Predictive Routing. Supervisors can define escalation rules and approve responses that exceed defined thresholds.

Consistent, Contextual Engagements
Agents manage social messages including asynchronous conversations within a single, optimised workspace. They can access full transcript history, use canned responses, and apply rich media like images, PDFs, quick replies, and carousels for enhanced interaction quality.

Streamlined Operations and Performance Insights

Real-Time and Historical Reporting
Track performance metrics for social media alongside all other channels. Centralised dashboards provide actionable insights into agent productivity, customer satisfaction trends, and engagement effectiveness supporting data-driven decision-making and strategic improvements.

Secure and Scalable Integrations
Extend your capabilities through open messaging APIs to support custom-built apps and review platforms. Genesys enables businesses to scale social service operations while maintaining secure, unified data across all interactions.

Uninterrupted, Threaded Conversations
Maintain consistent, single-threaded dialogues across social messaging channels. Ensure customers interact with the same agent where possible and preserve conversation context to avoid repetition and confusion.

Easy Escalation Across Channels
When deeper support is needed, effortlessly escalate social interactions to other channels such as SMS, chat, email, or voice while preserving the original conversation flow and history.

Empower Agents, Improve Response Times, and Strengthen Brand Loyalty

Faster Responses and Greater Customer Satisfaction (Token Based feature)
Equip agents with tools to respond promptly and intelligently. AI-driven monitoring and auto-routing ensure urgent issues are addressed quickly, increasing customer trust and loyalty.

Operational Agility with Seamless Integration
Streamline setup and management of social channels within your contact center. With fast deployment and self-service configuration, companies can begin handling both public posts and direct messages quickly and effectively all within a unified system.

Actionable Social Media Insights
Leverage centralised analytics to identify key trends, optimise customer journeys, and improve campaign effectiveness. Insights into customer sentiment and behavior drive better service strategies and support long-term relationship building.

Workforce Management on the Go with Genesys Tempo

Key Capabilities

Mobile Access to Your Schedule
Genesys Tempo is a dedicated mobile app for workforce management that lets agent view and manage their work schedule directly from smartphone or tablet. (Requires Mobile > Tempo > View permission.)

Easy Installation and Setup
Download Tempo from the Google Play Store or Apple App Store and sign in with your Genesys credentials to get started in seconds.

Real-Time Notifications
Receive push alerts for upcoming shifts, approvals, and schedule changes so agents are always up to date.

Self-Service Time-Off Management
Submit new time-off requests, check the status of pending requests and notify agents supervisor if agents will be late

Flexible Shift Trading and Drop
Offer or pick up shifts with coworkers, propose shift trades and monitor trade approvals and drop unwanted shifts and browse available ones

Seamless Supervisor Communication
Let supervisor know immediately when agents need to swap, drop, or request time away right from the app, without returning to their desktop.

iOS

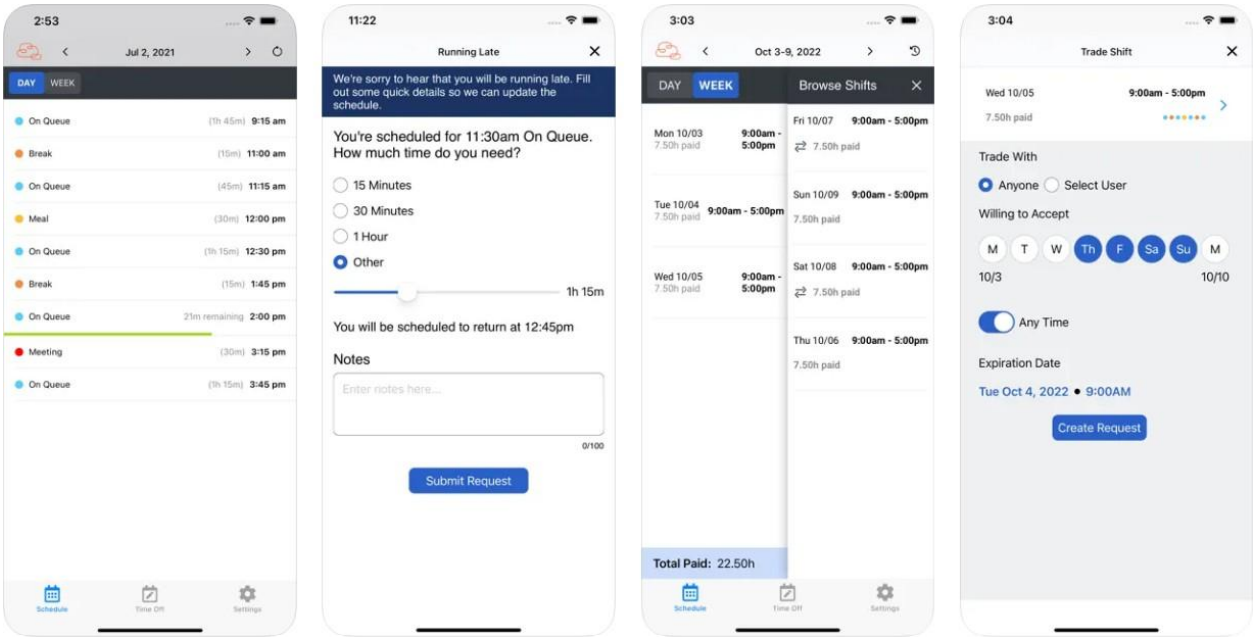


Figure 12: iOS

Android

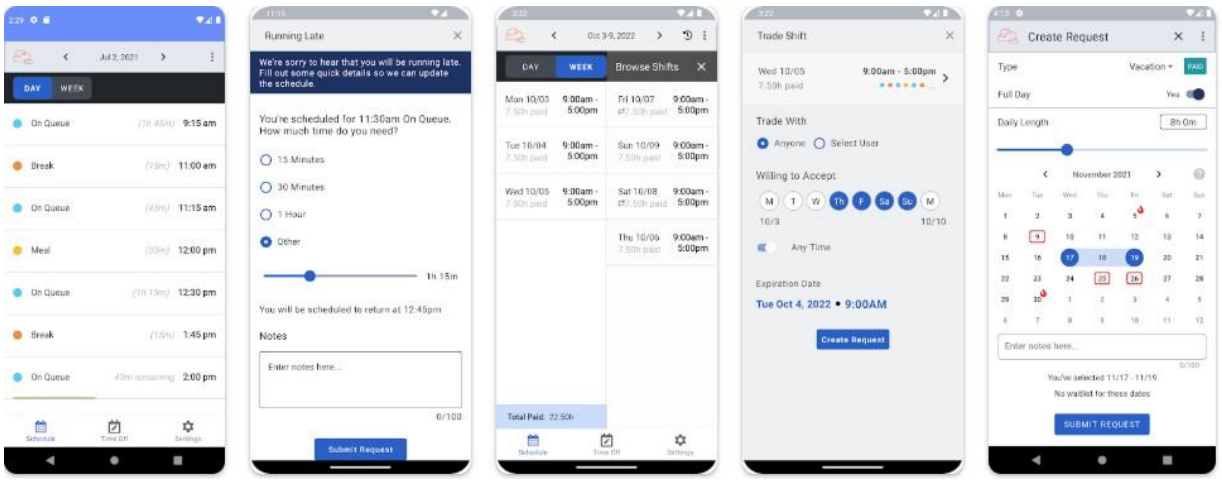


Figure 13: Android

Text-to-Speech (TTS)

Genesys Cloud provides a flexible text-to-speech (TTS) framework that lets you use its built-in engine or integrate third-party voices via the AppFoundry. By default, Genesys TTS delivers basic voice synthesis, while the optional Genesys Enhanced TTS adds PCI DSS compliance for secure call flows at no extra charge until used

For broader voice options, the Genesys TTS Connector lets you plug in virtually any external TTS engine, though it is not PCI-compliant and therefore cannot be used in secure flows

Key Capabilities

Pre-built AppFoundry integrations include:

Amazon Polly, Google Cloud Text-to-Speech, Microsoft Azure Cognitive Services TTS, and Nuance TTS, all PCI DSS compliant for use in secure interactions.

Acapela Voice and Speech Morphing, which offer additional voices but lack PCI compliance for secure call flows

Once installed, customer can select default engine at the organisation level and then choose specific voices and languages within Architect flows complete with testing and playback features to tailor the customer experience.

Note: All Genesys Cloud plans are natively enabled with ready-to-use Genesys Cloud AI capabilities. However, Genesys Cloud AI Experience tokens are required for certain features. 250 named / 350 concurrent tokens per org/month included in Genesys Cloud CX for voice contact centers license.

Following are the add-on and token based features available for the customers to leverage:

Add-on: Workforce engagement management, Speech and text analytics, Employee Performance, Workforce management, Voice of the customer, Bot integration (Amazon Lex and Google Cloud), CRM and case management integration, unified communications and collaboration integration, custom reporting and data visualisations, and journey management

Tokens: Virtual agents, Native bots, Predictive Engagement, Predictive routing, Knowledge workbench, Knowledge optimiser, Agent Copilot, AI-guided scripts and flows, Enhanced post-interaction summaries, Automatic knowledge surfacing and answer highlighting, social listening and engagement, Speech and text analytics, Supervisor Co-pilot, Virtual Supervisor and Conversational intelligence.

Genesys Cloud CX 3 Overview

Genesys Cloud CX 3 builds on the foundational capabilities of CX 1 and CX 2, providing all digital messaging and voice channels, omnichannel routing, speech-enabled IVR, outbound campaign management, unified communications, and comprehensive analytics and reporting. These core services ensure that organisations can engage customers wherever they are, seamlessly shifting interactions between voice, chat, email, and social media while maintaining context and performance insights.

Beyond these established features, CX 3 introduces native workforce management enhancements to drive efficiency and quality. Supervisors can now directly monitor employee performance metrics, allocate resources dynamically, and enforce quality assurance and compliance standards all within the same platform used for customer engagement. This integration eliminates the need for separate WFM systems and gives managers real-time visibility into both operational performance and customer outcomes.

AI-Driven Enhancements with Cloud AI Experience Tokens

With the included **Cloud AI Experience** package (250 named / 350 concurrent tokens per org per month), you unlock:

- **AI Studio**: A centralised workspace in Genesys Cloud for designing, deploying, and governing your AI-powered experiences
- **AI Guides**: An easy, versatile no-code interface where you design agentic flows using prompts, conversation transcripts, or process documents.
- **Native Bots**: Deploy customisable conversational bots.
- **Predictive Engagement & Routing**: Proactively connect and intelligently deliver interactions.
- **Agent Copilot**: Provide AI-led assistance directly in the agent workspace.
- **AI-Powered Forecasting & Scheduling**: Automate workforce planning with predictive analytics.
- **Speech & Text Analytics**: Analyse customer interactions at scale for sentiment, trends, and compliance insights.
- **Knowledge Management**: Centralise and surface relevant information for agents.

Workforce Engagement Management (WEM)

Workforce Engagement Management in Genesys Cloud delivers an integrated suite of AI-powered tools designed to maximise employee engagement, performance, and satisfaction. By embedding WEM natively within your CCaaS platform, you eliminate disconnected systems and gain real-time visibility into both customer interactions and workforce metrics all from a single, unified interface.

Elevating Employee Experience and Retention
Personalised skill development pathways, real-time support, and motivational features such as gamified scorecards and leaderboards help agents grow and stay committed to your brand. These engagement levers reduce turnover costs and foster a high-performance culture that aligns individual goals with business outcomes

Driving Productivity and Meeting Service Goals
Built-in AI accelerators streamline routine tasks such as forecasting, scheduling, and quality evaluations so agents can focus on customer conversations rather than administrative overhead. AI-powered planning balances staffing demand with workload capacity, ensuring you meet service-level agreements while controlling costs and scaling flexibly as business needs change.

Comprehensive, AI-Powered Capability Suite
Genesys Cloud WEM bundles the following fully integrated modules:

- **Quality Management & Compliance**: Automate evaluation of every interaction with contextual AI to identify coaching opportunities and compliance risks.
- **Performance & Coaching**: Use sentiment and empathy analytics to pinpoint individual skill gaps, then deliver targeted coaching sessions directly from the supervisor workspace.
- **Workforce Management**: Leverage AI-driven forecasting and scheduling to optimise shift assignments, manage absences, and facilitate shift trades empowering employees with self-service via mobile.
- **Analytics & Reporting**: Aggregate real-time and historical data on interactions and workforce performance in customisable dashboards for continuous optimisation.

Unified Supervisor Interface and Simplified Administration
A single, cloud-native platform consolidates contact center and workforce management functions. Supervisors access real-time wallboards, post-interaction insights, and trend analytics from one workspace enabling rapid decision-making, resource reallocation, and strategic coaching without toggling between systems.

Enhanced Agility, Resilience, and Compliance
Modern cloud architecture ensures zero-downtime updates, while robust compliance certifications safeguard sensitive data. Automatic recording of every channel interaction, combined with AI-driven topic spotting and sentiment analysis, uncovers performance patterns and compliance issues helping you mitigate risk and augment quality processes at scale.

Business Impact and Value
By unifying WEM with your Genesys Cloud platform, you drive higher employee engagement, boost productivity, and improve customer satisfaction, all while reducing total cost of ownership. Our customers have reported up to 50% reductions in handle time and double-digit improvements in schedule adherence and agent retention.

This comprehensive WEM solution empowers your entire CX organisation agents, supervisors, planners, and managers to focus on delivering exceptional customer experiences through motivated, well-supported, and optimally scheduled teams.

Conversational Intelligence with Genesys Cloud

Genesys Cloud leverages AI-powered conversational intelligence to transform customer interactions into actionable insights, enabling data-driven decisions that enhance customer experience and operational performance.

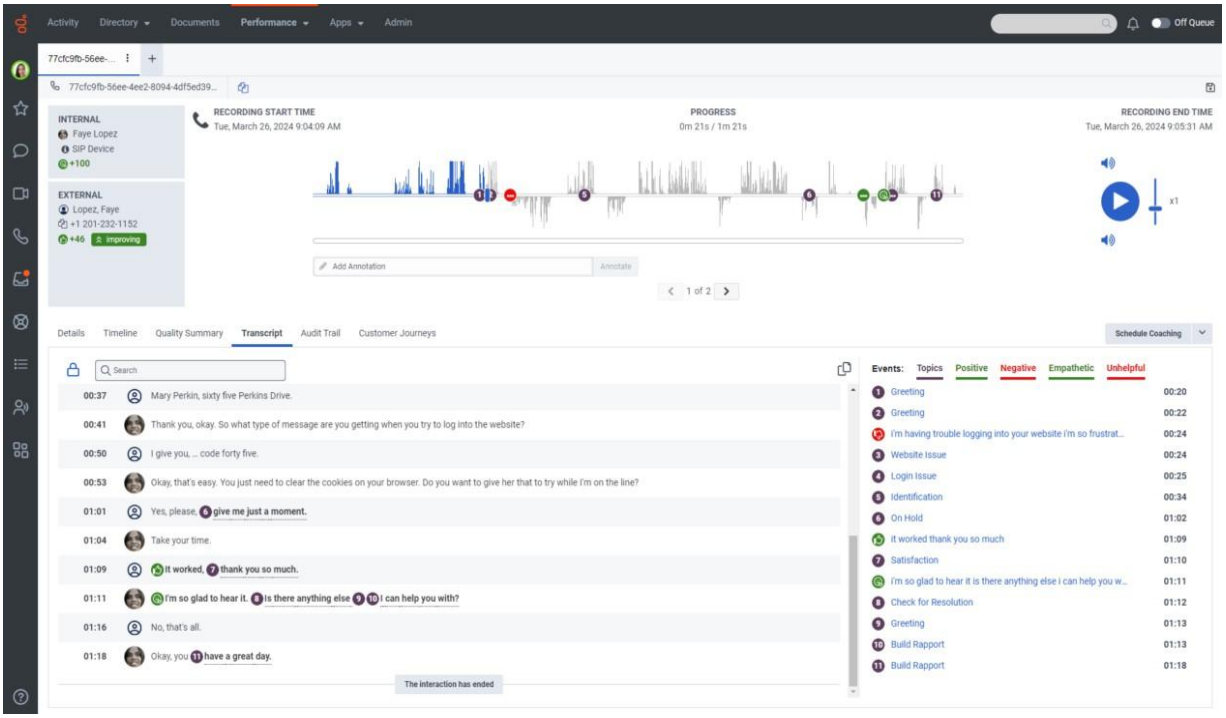


Figure 14: Conversational Intelligence with Genesys Cloud

Key Capabilities

Voice Transcription
Accurately transcribe interactions with auto-redaction of PCI and PII data, turning conversations into rich data sources.

Topic Spotting & Categorisation
Use AI to detect emerging topics and recurring issues across voice and digital channels. Customise dictionaries with business-specific terms to improve detection accuracy.

Interaction Search
Search across all interactions, empathy metrics, and sentiments to uncover insights into agent performance and customer satisfaction.

Sentiment Analysis
Analyse post-interaction sentiment using native AI to understand customer needs and identify service gaps.

Agent Empathy Measurement
Track and coach empathy-related behaviours to strengthen customer relationships and personalise support.

Visual Conversational Intelligence
Visualise topics, behaviours, and sentiments by agent, queue, or flow, and filter data to surface actionable insights for quality improvement.

Efficiency & Accuracy at Scale

Omnichannel Analytics
Unify analytics across voice, digital, and social platforms to provide a complete customer journey view.

Optimised Interaction Analysis
Replace manual reviews with AI-driven tools to reduce analysis time, enabling fast and accurate insights.

Enhanced Transcription Quality
Use machine learning and custom dictionaries to continually improve transcription accuracy for better analytics.

Scalable Insight Sharing
Simplify data management with custom reports and APIs, making insights easily shareable across the organisation.

Business Impact
Genesys Cloud empowers supervisors and teams with the insights they need to elevate service quality, personalise coaching, and drive meaningful business outcomes all while staying agile and customer-focused.

Empower Agents with AI-Driven Assistance

Genesys Agent Copilot transforms the agent experience by automating tasks, surfacing insights in real-time, and guiding agents through every customer interaction enabling them to focus on building meaningful connections.

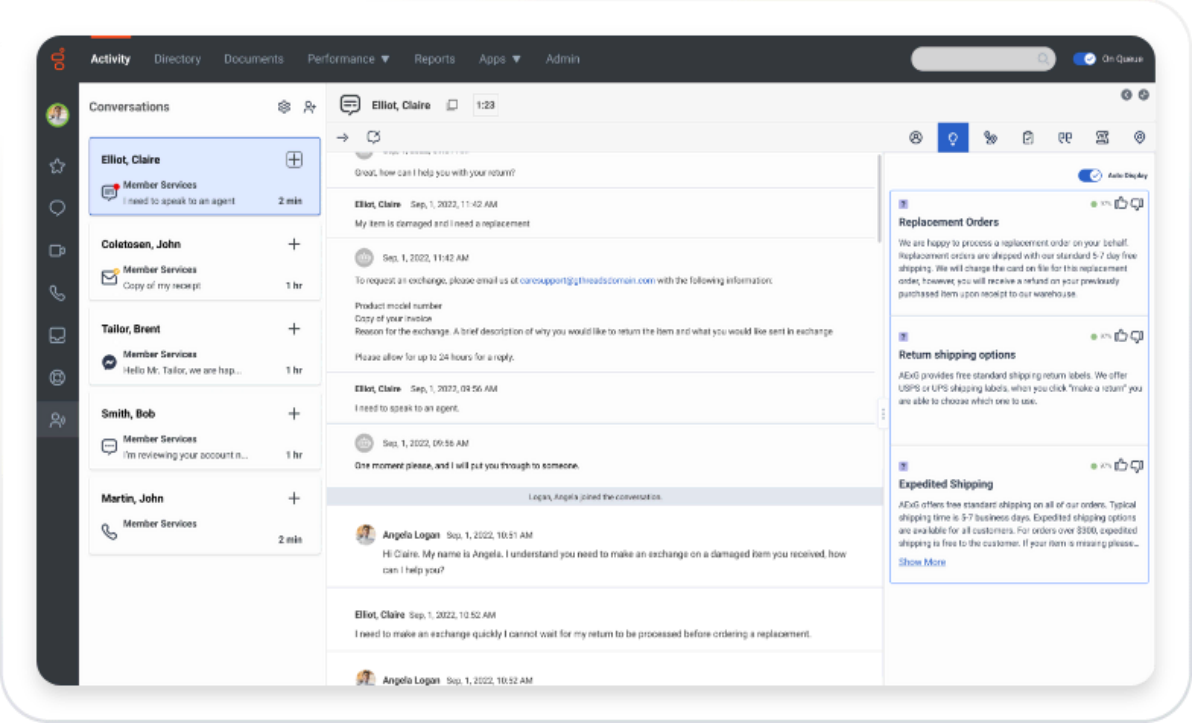


Figure 15: Genesys Agent Copilot

Key Capabilities

Real-Time Knowledge Automation
Automatically delivers relevant knowledge articles and materials based on live interactions, reducing manual searches and improving response speed.

Next Best Action Recommendations
Uses AI to suggest context-aware next steps, surface workflows, and guide agents with custom scripts during conversations helping them stay focused and effective.

AI-Powered Summarisation
Generates consistent, accurate summaries of interactions using generative AI, eliminating time-consuming notetaking and streamlining post-call wrap-up.

Embedded Knowledge Management
Centralised knowledge via Genesys Knowledge, providing agents with access to structured, searchable content and enabling quick article creation and updates.

Wrap-Up Code Prediction
Automates routine end-of-interaction tasks, further reducing agent workload and enhancing operational efficiency.

Agent Feedback Loop
Allows agents to fine-tune AI suggestions, ensuring continuous optimisation of assistance tools and improving relevance over time.

All-in-One Intelligent Agent Support
Agent Copilot provides start-to-finish assistance across voice and digital channels. From real-time knowledge and automation to interaction history capture and omnichannel support, it enables:

- Faster onboarding and training
- Improved agent performance and consistency
- Deeper customer insights
- Increased agent satisfaction and focus on high-value tasks

By combining AI-guided actions, intuitive knowledge access, and process automation, Genesys empowers agents to deliver exceptional customer experiences with greater confidence and less effort.

Drive Employee Productivity and Retention

Genesys Cloud empowers employees from onboarding through to long-term development with AI-driven tools that enhance performance, engagement, and retention all from a unified, native platform.

Key Capabilities

Performance Management & Insights
Monitor agent performance in real-time using AI-powered dashboards and gamified scorecards. Transparent KPIs enable agents and supervisors to align, self-correct, and continuously improve.

Embedded Learning & Coaching
Deliver personalised training based on individual learning styles and performance gaps. In-platform tools allow seamless scheduling of coaching sessions and targeted upskilling at optimal times.

Gamification & Recognition
Boost motivation with leaderboards, point-based contests, and recognition programs. Tangible rewards and peer comparisons drive engagement, teamwork, and excellence.

Unified Employee Experience
Manage training, performance tracking, recognition, and development from a single agent hub. This centralised access supports a personalised, frictionless experience.

AI-Powered Personalisation
Automate workflows and tailor development journeys using AI. Provide employees with visibility into their performance and how it contributes to wider business goals.

Business Impact
By combining performance insights, coaching, gamification, and learning into one native solution, Genesys Cloud fosters a culture of growth, accountability, and recognition helping you retain top talent and build high-performing team.

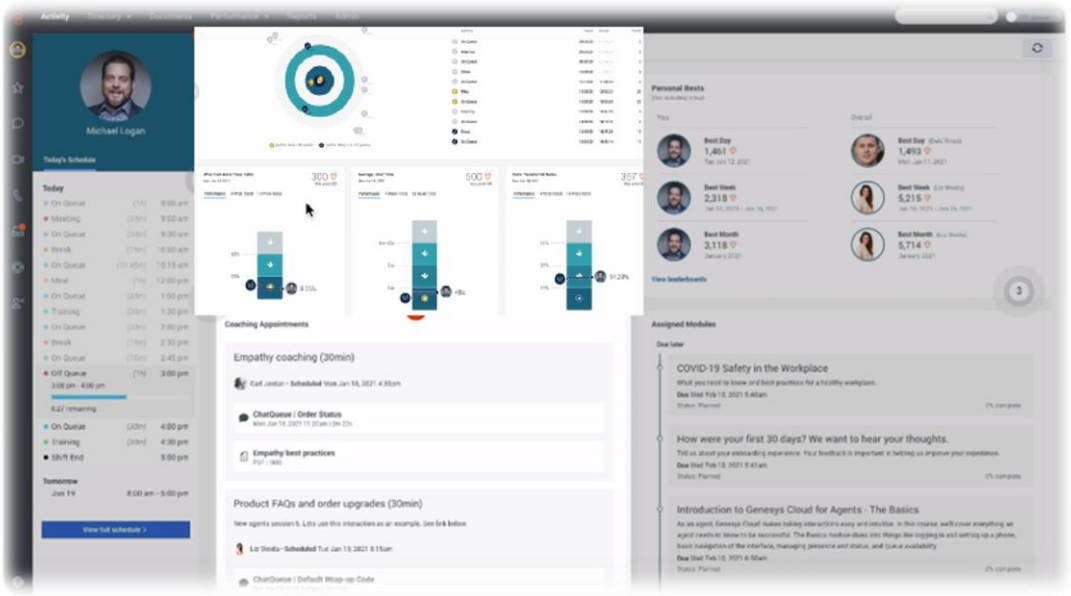


Figure 16: Business Impact

WFM-Smarter Forecasting and Scheduling with Genesys Cloud

Genesys Cloud empowers organisations to streamline workforce planning, enabling faster, more accurate scheduling while improving employee satisfaction and operational performance.

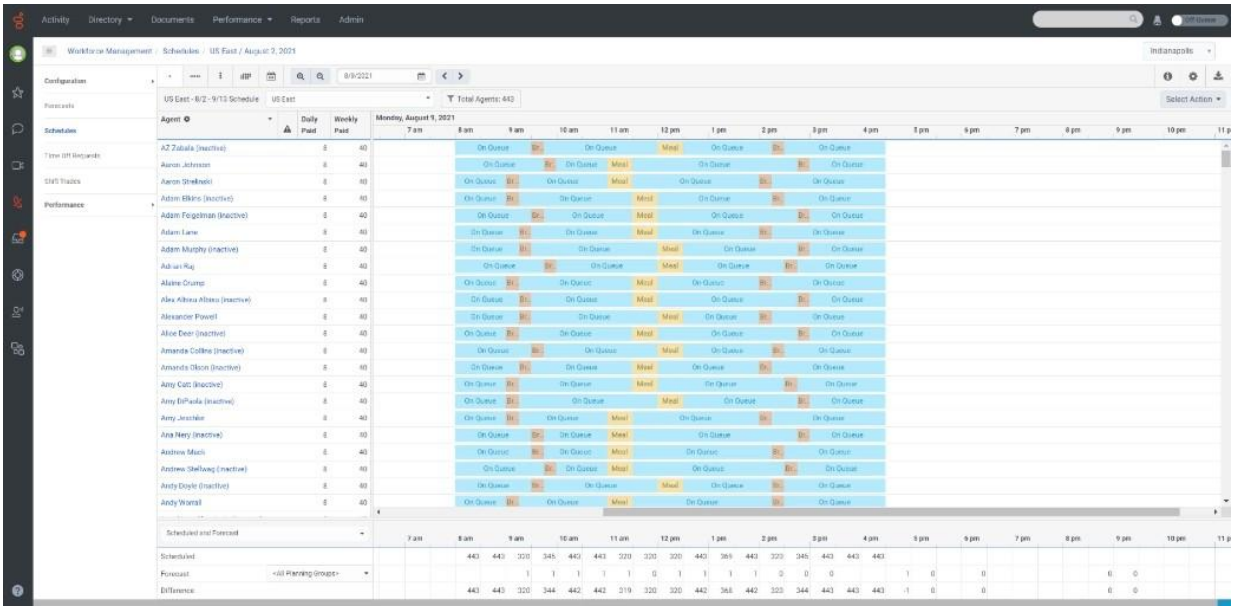


Figure 17: WFM-Smarter Forecasting and Scheduling with Genesys Cloud

Key Capabilities

AI-Powered Forecasting
Generate accurate, long-term forecasts using over 25 machine learning models. Adapt schedules instantly based on real-time data, ensuring optimal staffing, reduced overtime, and increased planning confidence.

Flexible Scheduling
Create load-based, blank, or flexible schedules with or without forecasts. Automate time-off, shift trades, and overtime rules using AI, while handling exceptions seamlessly to maintain performance targets.

Real-Time Monitoring & Insights
Track service levels, adherence, and occupancy in real-time. Compare actual activity vs. forecasted performance across all channels to make informed intraday decisions.

Employee Mobility & Self-Service
With the Genesys Tempo app, employees can manage schedules, submit time-off requests, trade shifts, and receive updates all from mobile, enhancing flexibility and engagement.

Integrated Multichannel Management
Align workforce planning with omnichannel interaction data for seamless work distribution, skill-based routing, and compliance with labour rules across complex organisational hierarchies.

Automation of Operational Processes
Reduce manual effort with intelligent auto-approvals, dynamic AI scheduling adjustments, and centralised management of all workforce activities allowing leaders to focus on strategic outcomes.

Business Impact
By unifying forecasting, scheduling, and employee engagement in a single solution, Genesys Cloud boosts workforce efficiency, supports work-life balance, and empowers teams to deliver exceptional customer experiences with greater agility and precision.

Embedded Knowledge Management for Exceptional CX

Enhance customer and agent experiences with an intuitive, AI-powered knowledge management solution fully integrated into your Genesys environment.

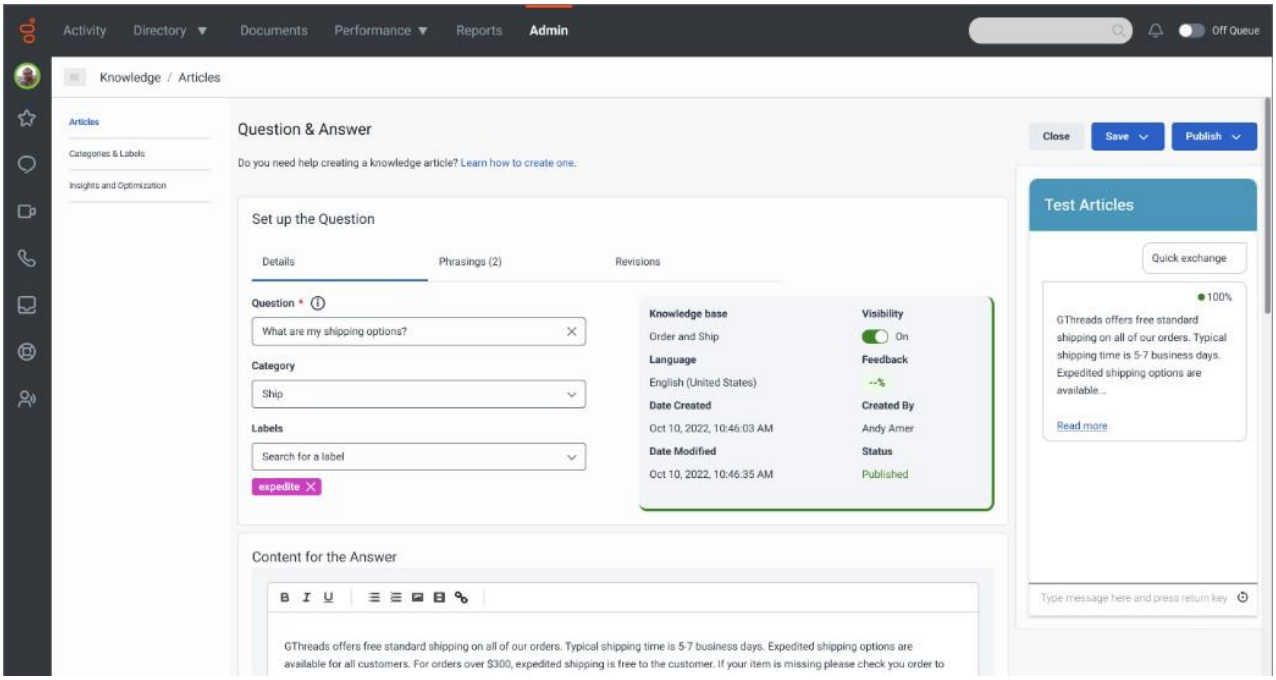


Figure 18: Embedded Knowledge Management for Exceptional CX

Centralised, Intuitive Knowledge Workbench
Create, curate and deliver rich content using a no-code, intuitive interface. Save time for authors and make knowledge easily discoverable through intelligent organisation.

AI-Powered Semantic Search
Deliver dynamic, contextual answers using semantic search that understands intent improving responsiveness and enabling deeper customer relationships.

Scalable Self-Service
Empower customers and agents with real-time access to knowledge via bots, agent assist, and support centers. Reduce resolution time and escalate only complex needs to humans.

Insight-Driven Optimisation
Gain visibility into knowledge usage, effectiveness, and gaps across interaction points. Optimise continuously using built-in reporting and Knowledge Optimiser analytics.

Personalised, Multilingual Content
Deliver knowledge in the customer's preferred language and context, with support for multiple languages and flexible query handling across channels.

Open, Flexible Architecture
Seamlessly integrate with third-party systems and import existing content. Connect distributed knowledge sources to power a unified, intelligent ecosystem.

Unified Knowledge Across Touchpoints
Put knowledge at the core of digital and voice interactions. Enable consistent CX by supporting every touchpoint from self-service portals to agent desktops.

Smart Knowledge Portals

Launch web-based, searchable knowledge portals using simple code snippets. Deliver quick, relevant results with features like type-ahead search.

AI-Driven Predictive Engagement

Deliver personalised, timely, and effective customer experiences by leveraging AI-powered insights, predictive analytics, and omnichannel orchestration.

Personalised Engagement Through AI
Enrich customer profiles with real-time and historical data from voice and digital channels. Empower agents with deep context to personalise conversations and improve first-contact resolution.

Predictive Intelligence
Use machine learning to identify behavioural patterns such as churn risk or cart abandonment. Predict intent and automate engagements at the optimal moment to maximise outcomes.

Journey Visualisation and Context
Provide agents with complete customer journey maps and third-party data integrations. Understand customer needs at each stage and tailor interactions accordingly.

Dynamic Segmentation and Targeting
Segment customers in real-time based on behaviour, intent and value. Trigger personalised interactions via bots, content offers, messaging, or live agents on the most effective channel.

Outcome-Based Orchestration
Score potential outcomes in real-time and optimise engagements based on likely business impact. Use AI alongside rules to fine-tune strategies dynamically.

Omnichannel Experience Management
Orchestrate proactive, cross-channel experiences from a single platform. Integrate seamlessly with CRM and marketing systems like Adobe for consistent messaging.

Action Maps and Campaign Automation
Activate campaigns automatically based on behavioural triggers and AI predictions. Launch the right engagement chat, content, or agent at the right time.

Continuous Learning and Analytics
Leverage real-time reporting and AI self-learning to refine strategies. Use audience estimations and analytics to measure impact and continuously improve outcomes.

Predictive Routing with AI

Enhance customer experiences and operational performance by using AI to intelligently match customers with the best-fit agents, improving key business metrics without complexity.

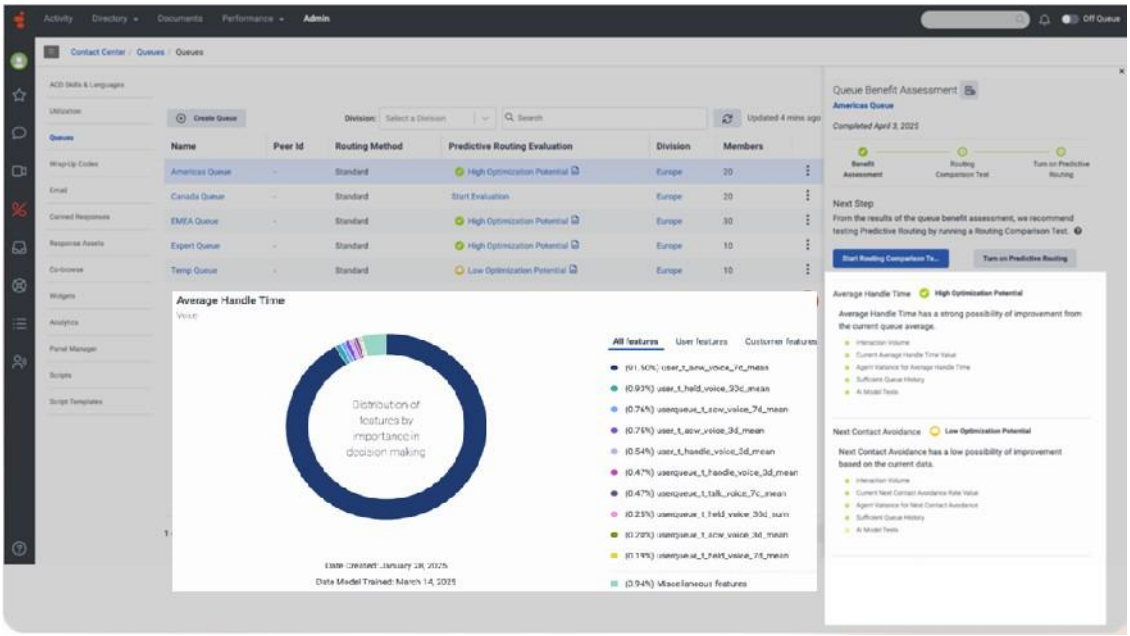


Figure 19: Predictive Routing with AI

Smarter Customer-Agent Matching
Automatically connect customers with the most suitable agents by analysing interaction history, behaviour patterns, and agent strengths. Go beyond static routing to improve first-contact resolution, reduce churn, and boost sales.

AI-Driven Orchestration
Continuously adapt routing decisions based on real-time insights. Predictive models learn from data and optimise routing logic to meet KPIs like handle time and next contact avoidance.

Easy Deployment and Management
Get started quickly with turnkey AI and a unified dashboard. No complex setup or additional services required. Non-technical users can test, configure, and deploy models effortlessly across voice and digital channels.

Transparent and Explainable AI
Gain full visibility into AI decisions with built-in explainability features. Understand which data points influence routing for better business control and compliance.

Integrated and Scalable
Use predictive routing alongside existing rules with no need to rip and replace. Gradually adopt AI while benefiting from consistent performance gains.

Unified Data for Actionable Insights
Simplify operations with a centralised data repository and intuitive UI. Detect optimisation opportunities, test new queues, and track AI impact all within one platform.

Optimized for Business Impact
Tailor routing to your unique goals. Whether it is reducing handle time, improving CX, or increasing revenue, predictive routing aligns AI performance with business objectives.

AI Studio

AI Studio is the centralised workbench in Genesys Cloud for building, governing, and deploying AI across customer touchpoints. It centers on two capabilities:

- AI Guides – natural-language, no-code design of AI agents/ “agentic” experiences that plug into Architect Virtual Agent flows.
- Custom Conversation Summaries – configurable, brand-tuned summaries with optional PII redaction for post-interaction use (CRM notes, QA, case wrap-up).

AI Guides

- **Prompt-like design:** Customer can build flows in plain language; Guides dynamically adapt to customer context and intent, blend structured logic with AI, support task completion and controlled handoffs.
- **Plug-and-play with Architect:** Customers can publish a Guide, then call it from an Architect Virtual Agent (voice or digital) using the Call Guide action. Keeps your existing routing, policies, and reporting.
- **Cross-channel:** Use within digital bot flows and voice bots to keep experiences consistent across chat, messaging, and telephony.
- **Governance & control:** Managed inside Genesys Cloud with role-based permissions for who can view, edit, publish, and connect Guides.

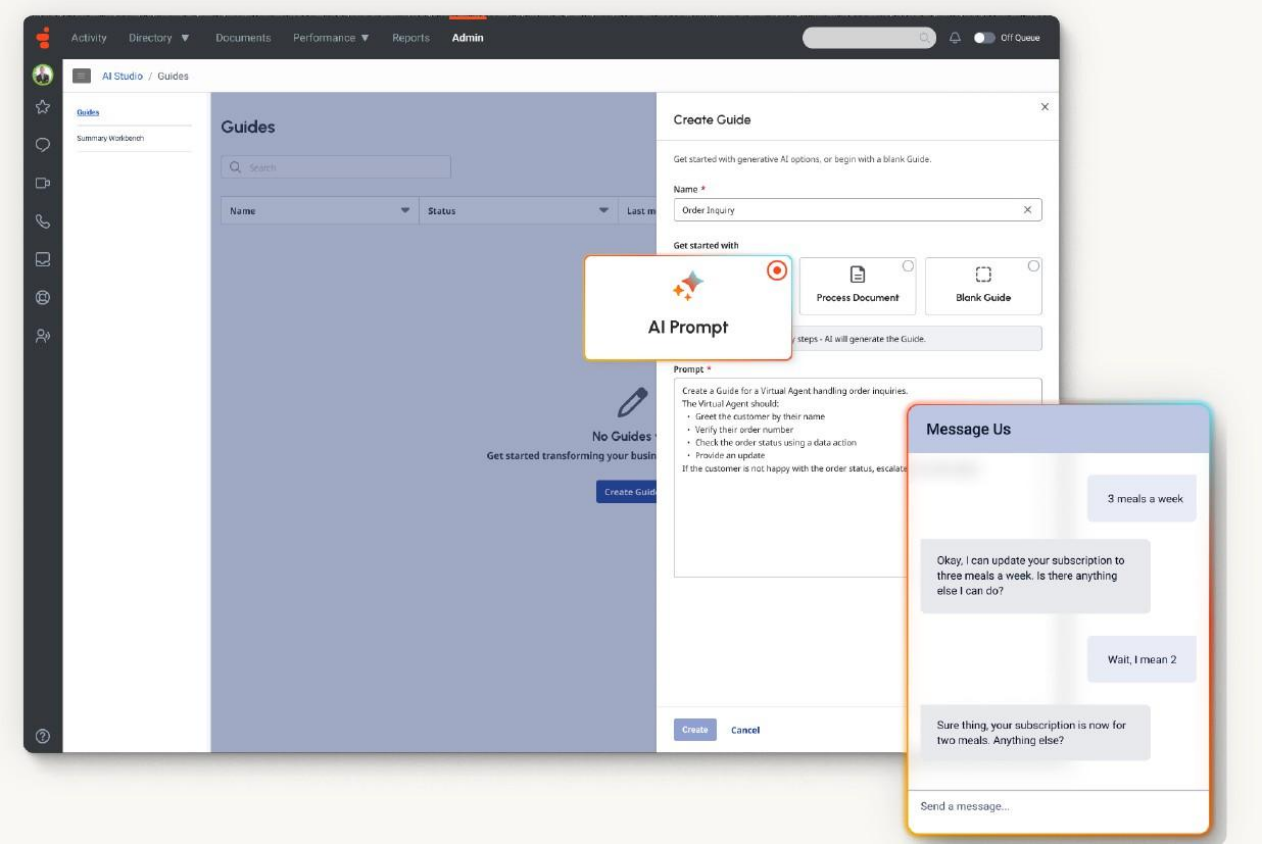


Figure 19: Genesys Cloud AI Guides translates your existing documents.

Custom Conversation Summaries

- **Brand-tuned outputs:** Define tone, structure (e.g., reason for contact, steps taken, next actions), and business entities to capture.
- **Safety options:** Choose whether to redact PII automatically in the generated notes.
- **Downstream ready:** Use summaries for CRM updates, QA, coaching, or analytics pipelines.

Benefits to customers & operations

- **Faster time-to-value:** No-code authoring enables business users to ship improvements quickly; no major re-architecture required since Guides plug into existing Architect flows.
- **Higher containment & CSAT:** Context-aware Guides resolve more tasks in self-service; when they escalate, they hand off with full context.
- **Agent efficiency:** Clean, consistent summaries shorten wrap time and improve record quality; supervisors get better inputs for QA/coaching.
- **Governed innovation:** Role-based permissions and centralised controls reduce risk while allowing rapid iteration.

Simplify Digital Self-Service with AI-Powered Chatbots

Deliver consistent, engaging, and intelligent support at scale using chatbots fully integrated with Genesys Cloud CX.

Reliable and Consistent Support
Chatbots provide instant, accurate answers to common questions ensuring every customer gets consistent service without wait times.

Contextual and Personalised Interactions
Leverage journey data, customer profiles, and transaction history to create chatbots that personalise each conversation and enhance customer satisfaction.

Smarter Conversations with AI
Built-in Natural Language Understanding (NLU) identifies intent, while semantic search retrieves relevant information to resolve queries effectively.

Easy Bot Creation and Deployment
Design intelligent bots using an intuitive drag-and-drop flow builder with dialog management and NLP features. Deploy seamlessly across channels like web, SMS, or social media.

Engaging, Multimedia Experiences
Enhance interactions with digital menus, images, videos, and integrated knowledge content for more dynamic and visual conversations.

Built-In Analytics and Continuous Improvement
Monitor chatbot performance with integrated reporting. Use insights from Intent Miner to refine bots using real customer interactions accelerating development and improving accuracy.

Flexible and Integrated
Build bots natively or connect to third-party bots using Genesys Bot Connector. Ensure a unified experience across bot and human touchpoints.

Seamless Bot-to-Agent Handoff
Genesys AI ensures smooth transitions from chatbot to live agents, carrying forward the full conversation history for uninterrupted support.

Enhance Customer Service with Intelligent Voice Assistants

Deliver natural, effective voice interactions by combining AI-powered Voicebots with human expertise—seamlessly and at scale.

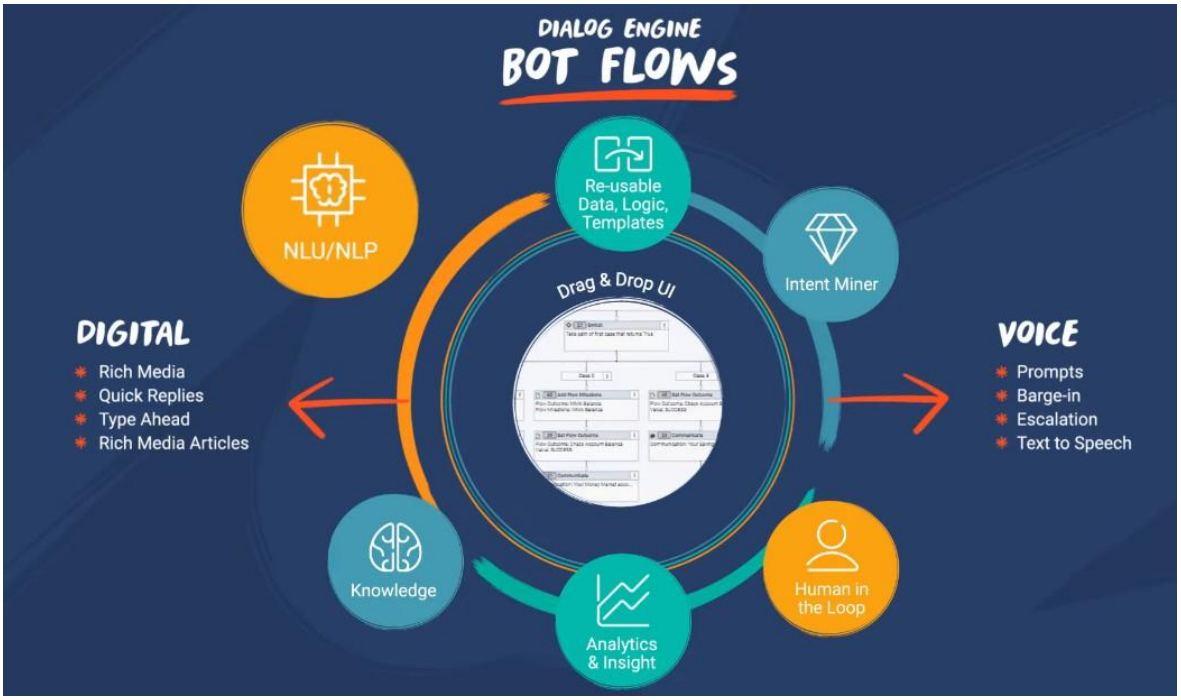


Figure 20: Dialog Engine Bot Flows

Smarter Conversations with NLU
Voice assistants use built-in Natural Language Understanding (NLU) to recognise customer intent, automate common interactions, and respond in natural speech.

Customer-Centric Experience
Voicebots serve as the first point of contact, resolving simple requests quickly and handing off complex issues to agents without making customers repeat themselves.

Data-Driven Voicebot Design
Use Intent Miner to build Voicebots based on real customer conversations. Automatically uncover and apply actual intent patterns for higher accuracy.

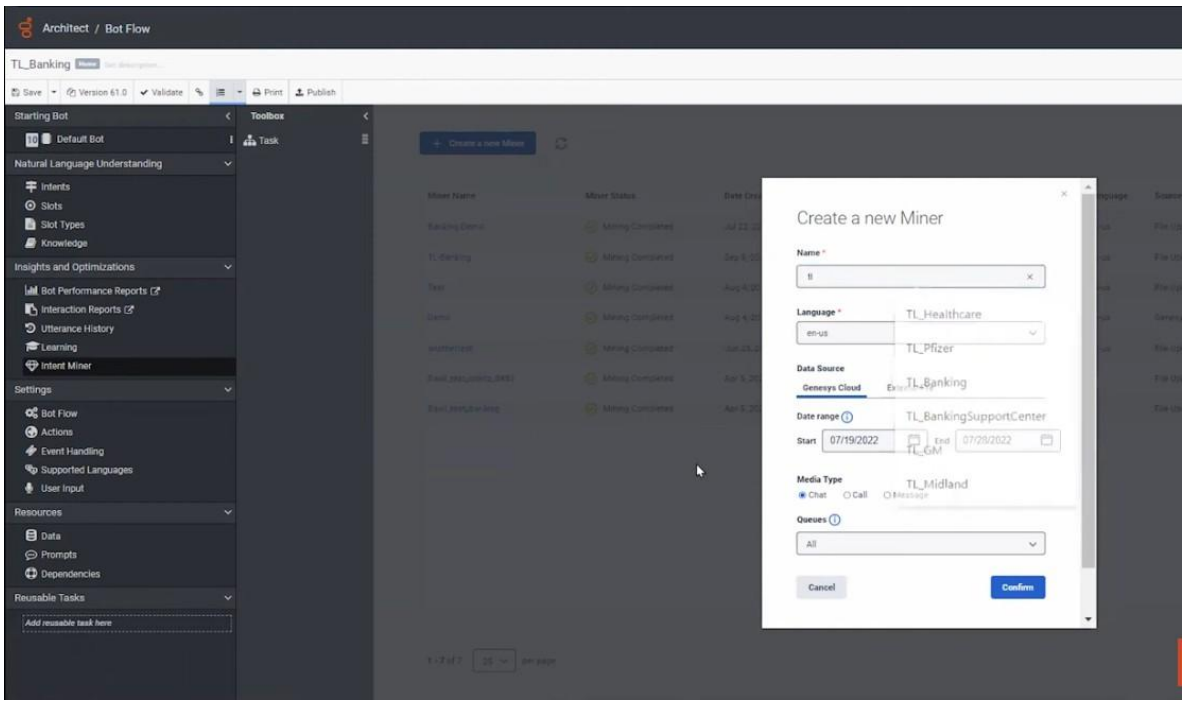


Figure 21: Data-Driven Voicebot Design

Seamless Human-Bot Collaboration
Ensure smooth transitions between Voicebots and agents. All context is preserved, enabling a consistent and frustration-free experience.

Unified Platform, Flexible Integration
Design and deploy bots using an intuitive drag-and-drop interface. Leverage Genesys Cloud or integrate with third-party AI to protect your existing investments.

Voice-Optimised Features
Enhance voice interactions with custom prompts, barge-in capabilities, and escalation triggers. Build smarter voice experiences tailored to customer needs.

Personalised, Scalable Engagements
Combine voice and customer data to personalise every interaction. Use AI to orchestrate journeys and expedite outcomes, freeing agents to focus on high-value tasks.

Consolidate and Streamline Operations with Work Automation

Simplify task management, break down silos, and deliver consistent service outcomes with a unified, automated work orchestration platform.

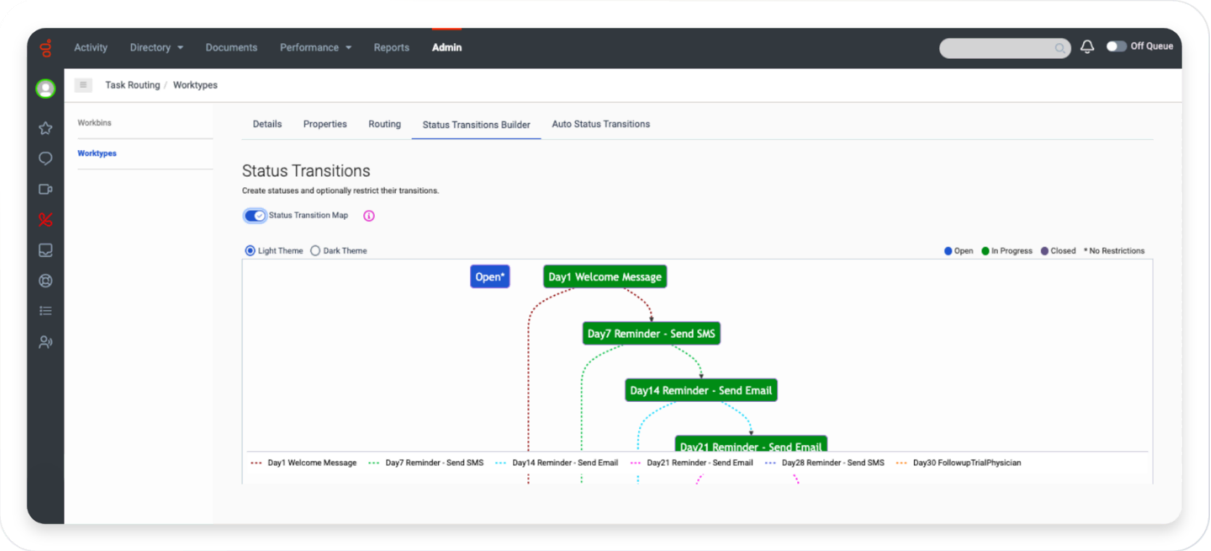


Figure 22: Consolidate and Streamline Operations with Work Automation

Centralised Task Visibility
Manage all tasks in one place with real-time tracking, filtering, and action controls. Gain a complete, centralised view of task status, ownership, and progress across teams.

Flexible and Smart Task Creation
Capture tasks from any system via APIs and enrich them with attributes for intelligent routing, prioritisation, and contextual handling.

Powerful, Configurable Workflows
Design custom task stages and transitions using agent-assisted or fully automated actions. Address complex back-office processes with ease.

Custom Workbins and Queues
Organise work with personalised or group-based workbins. Improve visibility, meet deadlines, and prevent backlogs with status tracking and due date management.

Automation and Progression Rules
Define SLA-based priorities, automate status transitions, and trigger actions to ensure tasks move forward and meet completion targets without manual intervention.

Integrated Analytics
Monitor task performance by type, location, and process. Use actionable insights to improve workforce productivity, skill alignment, and workload balance.

Unified Source of Truth
Eliminate data silos by integrating CRM, ticketing, and custom systems into one view. Make informed decisions using consistent, accurate, real-time data.

Real-Time SLA Management
Automatically prioritise and reassign tasks based on urgency and SLA targets. Let agents and supervisors align task execution with business goals dynamically.

Genesys Cloud CX 4 Overview

Genesys Cloud CX 4 is a robust, all-in-one omnichannel contact center solution designed to deliver exceptional customer and employee experiences through powerful AI, automation, and workforce engagement capabilities. It includes comprehensive support for digital and voice channels, omnichannel routing, speech-enabled IVR, and outbound campaigns, enabling seamless customer engagement across all touchpoints. The platform empowers agents with tools like Agent Copilot, knowledge management, and unified communications, while also supporting supervisors with quality assurance, compliance, employee performance tracking, and resource management.

In addition to advanced analytics and reporting, Genesys Cloud CX 4 features integrated forecasting and scheduling, along with speech and text analytics to help organisations continuously optimise operations. Each named agent license includes 30 AI Experience Tokens, with a default monthly allocation of 250 named or 350 concurrent tokens per organisation. These tokens unlock powerful AI-driven capabilities such as virtual agents, native bots, predictive engagement, predictive routing, social listening and engagement, Supervisor Copilot, and Virtual Supervisor. Customers can get additional Tokens as required for their business.

By combining these intelligent features within a single platform, Genesys Cloud CX 4 delivers a scalable, AI-powered contact center that enhances personalisation, improves operational efficiency, and aligns with strategic business goals ensuring consistent, high-quality customer experiences across every interaction.

Unified Social Media Customer Engagement

Genesys Cloud Social transforms how organisations manage and respond to customer interactions on public-facing social media platforms. Integrated directly into the Genesys Cloud™ platform, it centralises social engagement alongside other communication channels—delivering a consistent, intelligent, and scalable customer experience (CX).

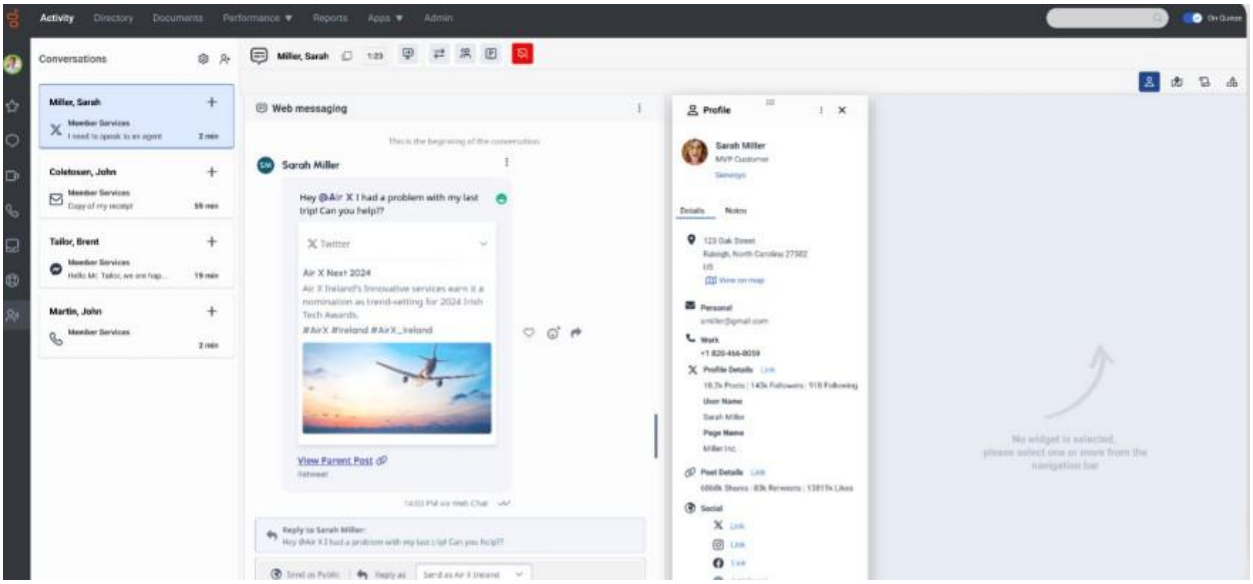


Figure 23: Unified Social Media Customer Engagement

Key Capabilities and Benefits

Omnichannel Social Media Management

Engage with customers on major platforms like Facebook and X (formerly Twitter).
Manage all interactions from a single, unified interface shared with other digital and voice channels.
Agents can respond to public posts and private messages without switching platforms.

Advanced Social Listening and Sentiment Analysis

Track keywords, hashtags, and accounts in real-time.
Use AI-powered sentiment analysis to classify posts as positive, neutral, or negative. Automatically prioritise and route posts based on emotional tone and urgency.

Integrated Routing and Queueing

Apply the same intelligent routing engine used across all Genesys Cloud channels.
Ensure social media interactions are queued and assigned based on business rules, SLAs, and agent skills. Prioritise high-impact posts to protect brand reputation and improve resolution times.

AI-Driven Automation and Agent Assistance

Automate responses to common inquiries using AI-powered bots.
Enhance agent efficiency with Agent Copilot, offering real-time response suggestions and contextual assistance.
Reduce agent workload and improve handling times while maintaining a personal touch.

Holistic Customer Journey Insights

Unify customer data across social, voice, messaging, and CRM systems (e.g., Salesforce). Gain a 360-degree view of customer interactions for more informed, personalised support. Track interaction history to improve outcomes and maintain conversation continuity.

Enhanced Brand Protection and Proactive Engagement

Stay ahead of crises by monitoring social sentiment and responding to emerging issues. Mitigate negative publicity with proactive service recovery before issues escalate.
Strengthen customer relationships and brand loyalty with timely, empathetic responses.

Scalable, Future-Proof Architecture
Built on the Genesys Cloud platform, supporting growth with robust performance and flexibility. Easily integrates third-party CRMs and marketing tools to support broader customer experience initiatives.

The Genesys Advantage

Seamless Omnichannel Experience
Manage all customer communications—including social, voice, and digital—from one consistent interface.

Operational Efficiency with AI
Automate repetitive tasks, assist agents with AI, and optimise resources through intelligent routing.

Strategic Brand Protection
Use real-time monitoring and sentiment analysis to safeguard your brand's reputation on public platforms.

End-to-End Customer Visibility
Consolidate customer interaction data across all touchpoints for consistent, personalised experiences.

Supervisor Copilot and Virtual Supervisor

Genesys Cloud introduces two advanced AI-powered tools, Supervisor Copilot and Virtual Supervisor, designed to enhance supervisor workflows, streamline quality management, and elevate overall contact center performance.

Supervisor Copilot: Real-Time AI Assistance for Supervisors
Supervisor Copilot serves as an intelligent assistant, enabling supervisors to efficiently monitor and manage agent performance.

Key features include

AI-Generated Summaries and Insights: Automatically produces concise overviews of customer-agent interactions, highlighting essential details such as contact reasons, resolutions, and follow-up actions. This facilitates quicker understanding and decision-making.

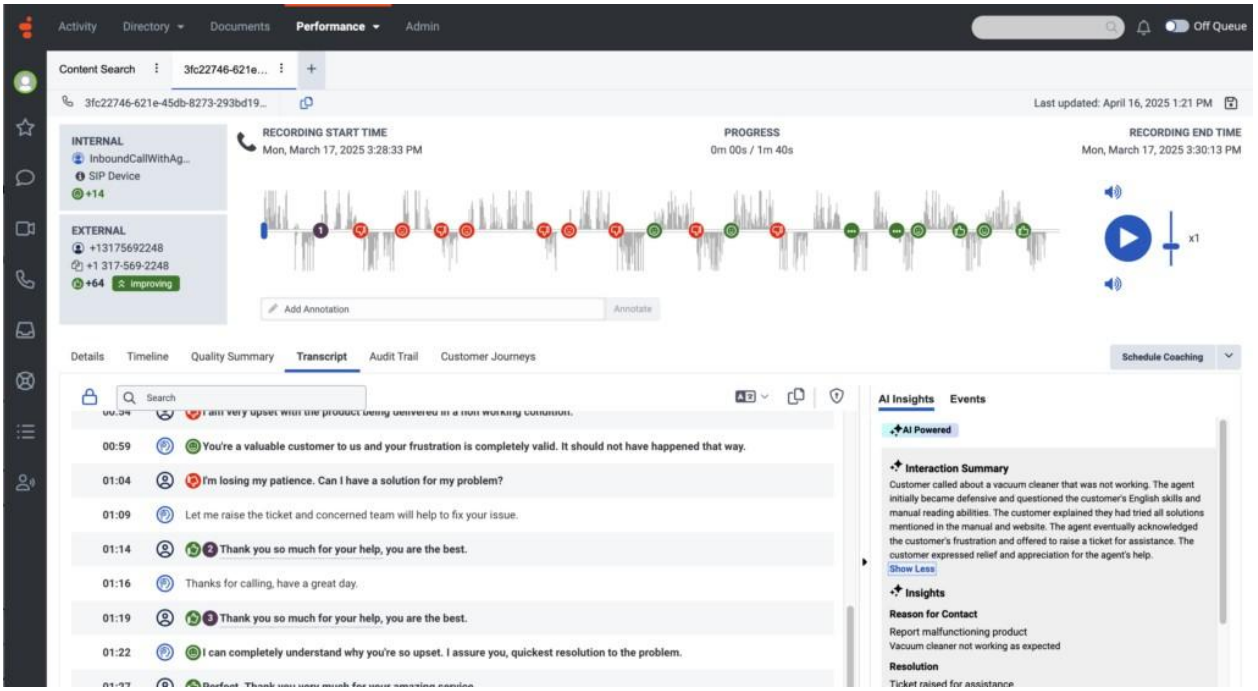


Figure 24: Supervisor Copilot: Real-Time AI Assistance for Supervisors

On-Demand Translation: Supports real-time translation of interaction transcripts into over 70 languages, allowing supervisors to comprehend multilingual conversations without language barriers.

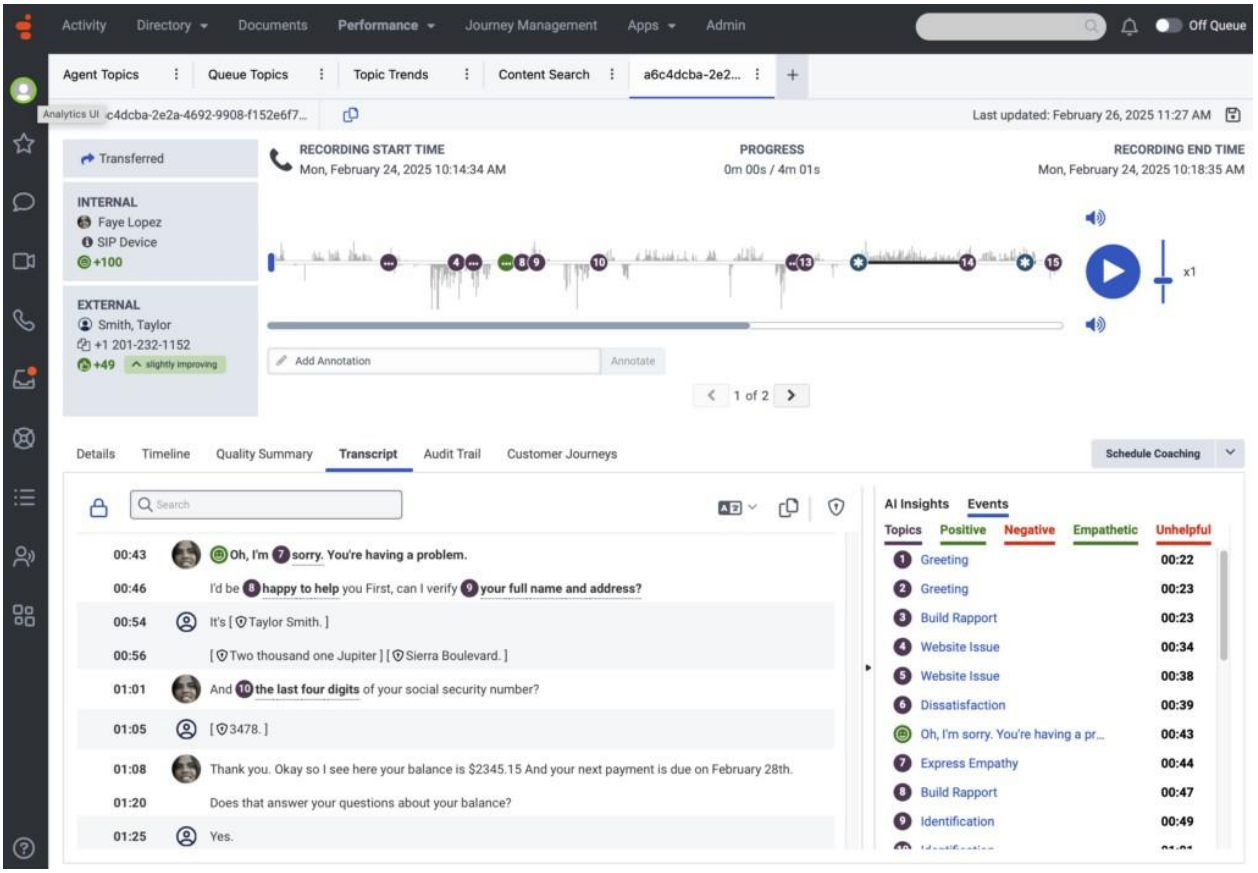


Figure 25: On-Demand Translation

Enhanced Coaching Opportunities: By analysing interactions, Supervisor Copilot identifies areas where agents may benefit from additional training or support, promoting continuous improvement. These capabilities empower supervisors to act swiftly on key information, ensuring consistent service quality and compliance across all customer interactions

Virtual Supervisor: Automated Quality Evaluations
Virtual Supervisor leverages AI to automate the quality assessment process, reducing the need for manual reviews and enabling supervisors to focus on strategic initiatives.

Its core functionalities include:

- **AI Scoring**: Automatically evaluates customer interactions based on predefined quality management criteria, providing consistent and unbiased assessments.

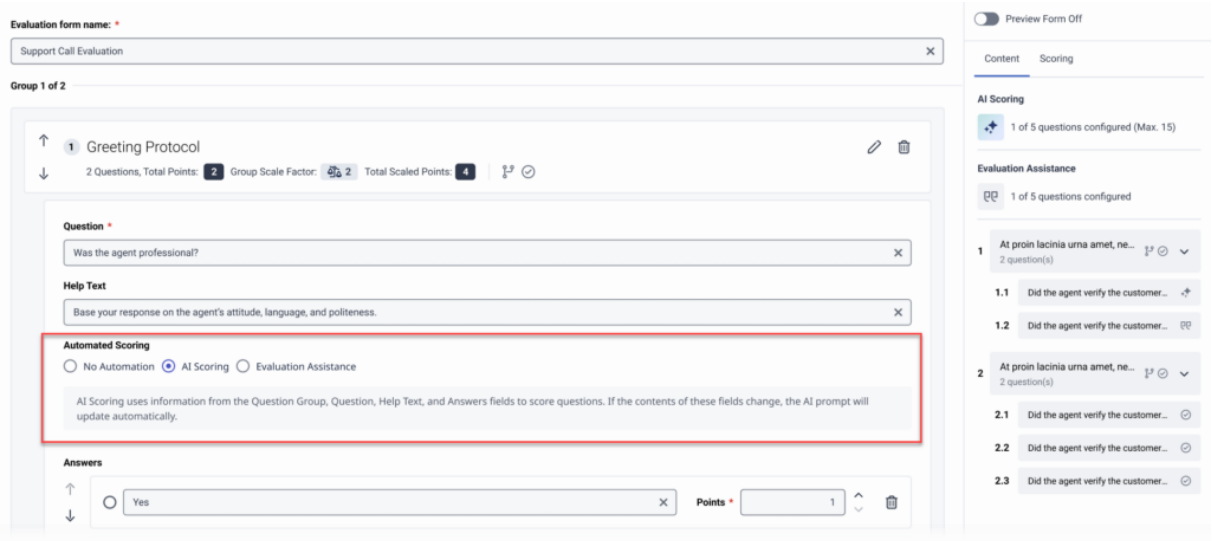


Figure 26: AI Scoring

- **Actionable Insights:** Delivers detailed analysis of agent performance, pinpointing strengths and areas for improvement, and offering explanations for each evaluation to support targeted coaching.
- **Scalability:** Allows organisations to scale their quality management efforts by efficiently processing a higher volume of evaluations without additional resources.

By integrating Virtual Supervisor, contact centers can enhance their quality assurance processes, leading to improved agent performance and customer satisfaction.

Optimise Customer Experiences with Journey Management

Delivering exceptional customer experiences starts with complete visibility into the customer journey. Genesys empowers organisations to understand, analyse and optimise every interaction by unifying customer data and delivering actionable insights through an AI-powered platform.

Holistic Journey Visibility

Genesys connects and visualises every customer interaction past and present into a unified, analytics-ready model. This enables immediate access to real-time, behavioural, and historical data without complex integrations or data prep.

Actionable Insights at Scale
With native journey analytics, businesses can rapidly uncover customer behaviour patterns, identify friction points, and monitor KPIs. These insights help teams make fast, data-driven decisions to improve satisfaction and drive loyalty.

From Insight to Orchestration
Insights inform and refine self-service flows, enhance agent experiences, and guide personalised engagement strategies—reducing costs while improving outcomes across the entire journey.

Empowering Every Team Member
With centralised data and intuitive tools, analysts, experience managers, and frontline agents can collaborate using the same insights—eliminating silos and accelerating customer-centric improvements.

Scalable, End-to-End Management
Built into the Genesys Cloud™ platform, journey management supports the full customer lifecycle with AI-driven capabilities that scale with your business and customer base.

Omnichannel Journey Analytics

Genesys empowers organisations to seamlessly measure and monitor customer behaviour across all channels with advanced journey analytics enabling real-time, actionable insights without the complexity of manual data prep.

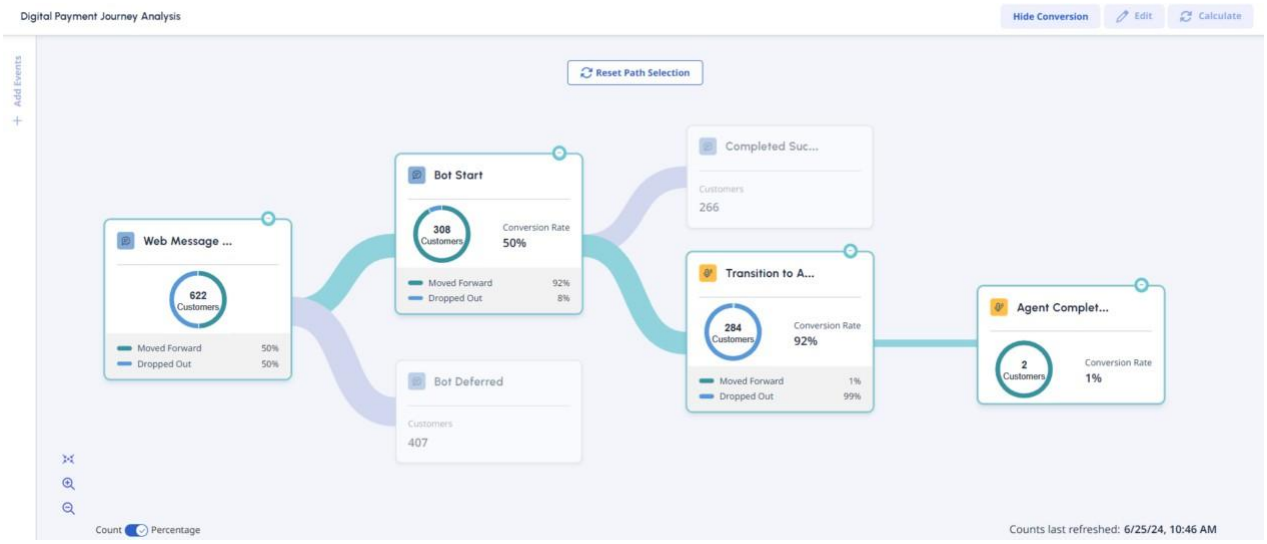


Figure 27: Omnichannel Journey Analysis

Unified, Analytics-Ready Data
Automatically aggregate data from every customer touchpoint into a centralised, analysis-ready model. Begin journey analysis instantly with no need for additional transformation or IT support.

Interactive Journey Visualisation
Visualise end-to-end customer journeys to identify friction, repeat interactions, and drop-offs. Understand how journey paths affect customer satisfaction and key outcomes.

Actionable Insights with Journey Analyser
Connect self-service and agent-assisted experiences to reveal how behaviours impact metrics like containment, abandonment, and churn. Move beyond traditional KPIs to diagnose root causes, not just symptoms.

Funnel and Flow Analysis
Track conversion steps, drop-off rates, and goal progression with funnel analysis. Understand real-world journey flows—such as bill payment or profile updates—to optimise critical paths and reduce unnecessary channel switches.

Data-Driven Experience Optimisation
Use live insights to fine-tune workflows, streamline handoffs, and improve outcomes in real-time. Genesys makes journey data accessible across teams, empowering everyone—from analysts to leadership—to make informed, customer-centric decisions.

Customer Journey Orchestration

Genesys enables organisations to continuously improve customer experiences by embedding journey insights directly into each interaction—driving personalisation, efficiency, and proactive engagement across all channels.

Optimise Individual Channel Journeys
Visualise customer paths within voice, IVR, and digital channels to identify friction and redesign flows for seamless, channel-specific experiences.

Enhance Cross-Channel Visibility
Unify data across channels to understand full customer journeys. Experienced designers can act quickly on insights, streamlining omnichannel experiences while reducing complexity and cost.

Deliver Proactive, Contextual Experiences
Leverage real-time insights to anticipate needs and trigger the next best action whether self-service, guided help, or agent routing right when it matters.

Orchestrate Improvements at Scale
Journey orchestration tools empower business leaders to detect emerging issues early and respond with targeted actions that improve outcomes across the board.

Data-Driven Personalidation
Use real-time and historical data to tailor interactions by segment and persona. Predictive routing and engagement ensure each customer receives the right support, at the right moment.

Evaluate and Prioritide Changes with Confidence
Compare journey performance side-by-side to identify which changes have the greatest impact. Use templates and pre-built samples to fast-track analysis and deliver quick wins.

Holistic Journey Measurement
Analyse all interactions centrally with Journey Analyzer. Understand how journeys affect key metrics like churn, containment, and satisfaction so you can act with clarity and precision.

Conclusion

Genesys Cloud offers a robust, microservices-based architecture designed to support scalable, resilient, and secure customer experience solutions across four licensing tiers CX1, CX2, CX3, and CX4. Each tier builds upon a unified platform foundation, providing technical buyers with flexibility, extensibility, and control over deployment strategy and roadmap alignment.

- **CX1** provides core capabilities including voice channel, speech enabled IVR, Outbound campaigns, Analytics and reporting, Unified Communications, Interaction recording, a centralided agent desktop, and baseline routing ideal for rapid deployment and foundational contact center functionality.
- **CX2** introduces Digital Channels, Omnichannel routing, quality assurance and compliance, and performance dashboards, enabling data-driven decision-making and agent optimisation through native and extensible APIs.
- **CX3** enhances the environment with Workforce Engagement, speech and text analytics, predictive routing, Agent Copilot, Knowledge, Native Bots and outbound engagement tools empowering organisations to leverage rich insights and AI-infused interactions.
- **CX4** delivers the full AI and automation suite, including predictive engagement, knowledge surfacing, bot orchestration, Genesys Social, Supervisor copilot, virtual supervisor, Journey management and digital self-service frameworks that can be integrated with existing enterprise ecosystems.

Each tier supports open APIs, event-driven integrations, and compliance frameworks (such as GDPR, HIPAA, and PCI DSS), ensuring alignment with enterprise IT standards. Genesys Cloud's continuous delivery model and DevOps-aligned development cycles reduce the burden on internal IT teams while providing frequent innovation and zero-downtime upgrades.

Together, these tiers enable businesses to start with what they need today and expand as their customer experience strategies evolve. Genesys Cloud ensures that regardless of the license level, organisations gain access to a unified, secure, and cloud-native platform that drives operational efficiency and enhances customer satisfaction across every interaction channel.

By choosing Genesys Cloud, organisations are investing in a proven solution that grows with them, supports digital transformation, and delivers world-class customer experiences at every touchpoint.

Genesys Cloud also includes the following:

- **Collaborate** is a social media app for the workplace with user profile pages, text chat, video chat, advanced search, groups, organisational views, screen sharing, and content management. Collaborate provides up-to-the-minute data on the people in an organisation and instant communication options for one-on-one or group discussions. Access Collaborate from apps for browsers, desktops, tablets, and mobile devices.
- **Communicate** is a set of communication services that includes phone, voicemail, fax, and conferencing. Genesys Cloud Communicate can serve as the complete communications system for the largest corporations in the world.

Kerv can complement the features of Genesys Cloud with the following integrations or stand-alone platforms:

- **Voxivo** is a unified Communication-as-a-Service (CaaS) solution. It is a cloud-based VoIP Phone system with the option for integration with Microsoft Teams (Voxivo4Teams) which provides the ability to easily manage interconnectivity between the public voice network and your enterprise's Microsoft Teams environment. The implementation of Voxivo4Teams extends the collaboration functionality of Teams and Direct Routing beyond the enterprise to your external customers and contacts, removing the need for any other systems to support external communications.

- **Microsoft Teams Direct Routing** is the flexible, accessible and cost-effective alternative to Microsoft Calling Plans, allowing you to make calls external to your business from Microsoft Teams. Kerv has built a bespoke Direct Routing architecture

to enable full voice capability natively into Microsoft Teams. Any public sector organisation using Microsoft Teams as their unified communications tool can implement Direct Routing from Kerv as their preferred provider for voice, and benefit from cost savings, increased functionality and support for migration.

- **Voxivo4Teams** is a cloud-based VoIP Phone system integrated into Microsoft Teams. This system is highly intuitive, to ensure that your teams can become more effective immediately. When Kerv developed Voxivo4Teams, we considered every element that defines an agile phone system for a 21st-century business, incorporating beautiful design, flexibility, scalability, control and cost reduction. Voxivo4Teams is a constantly evolving product with a published roadmap. The roadmap is delivered in an agile way meaning you constantly receive new features throughout the product lifecycle.

Pricing

There bare four tiers in our Genesys Cloud multi-channel contact centre solution with list pricing (before discounts) starting at:

Genesys Cloud CX 1 - £57.75 per user/month
Genesys Cloud CX 2 - £88.55 per user/month
Genesys Cloud CX 3 - £119.35 per user/month
Genesys Cloud CX 4 - £184.80 per user/month

Pricing is based on an annual prepay commitment and on a named user basis. Annual commitment with monthly payment or month to month payment options are also available. Pricing is also available per concurrent user and by-the-hour pricing. There are also bundles available for AI tokens and additional add-ons.

A minimum charge for Genesys Cloud license subscription fees with a monthly payment structure will be £1,500 GBP per month, regardless of usage and not including tax. The minimum charge for a Genesys Cloud subscription with an annual payment structure will be £18,000 GBP per year, regardless of usage and not including tax. Note that these minimums only apply to the license subscription fee only.

Further details are available in our pricing document.

On-Boarding Charges

There are many ways to get started with Genesys Cloud. Kerv Professional Services offers help to the self-started who do not need much help as well as to organisations requiring dedicated staff and ongoing support.

Custom Statements of Work may be required and are subject to tailored scoping and pricing.

Off-Boarding Charges

In the case of contract termination, the customer has the ability, at no cost, to acquire all the data they need to keep within 30 days of terminating their contract. All data in Genesys Cloud can be queried via the platform's Public API (including individual recordings). No decommissioning charges are applied.

Training Charges

Kerv provide full administrator and user training as part of the project lifecycle including go-live support where we will be onsite to support your agents through the first few days of adopting Geneys Cloud.

In addition to this, Genesys offer a full range of training services. Some courses and tutorials are available free of charge on the Genesys Beyond training portal: https://beyond.genesys.com/explore/home.

Additionally, the Genesys Cloud Learning Subscription provides access to all available training for Genesys Cloud and any new content released during the year of an active subscription. In addition, subscribers receive vouchers for Genesys Cloud certification exams. A single learning subscription provides access for one individual. It is ideal for any users that are responsible for the business and/or technical aspects of their Genesys technology, such as contact centre management, system administration, or integration.

The cost of Genesys Cloud Learning Subscriptions can be found in our pricing document.

Fair Usage Policies

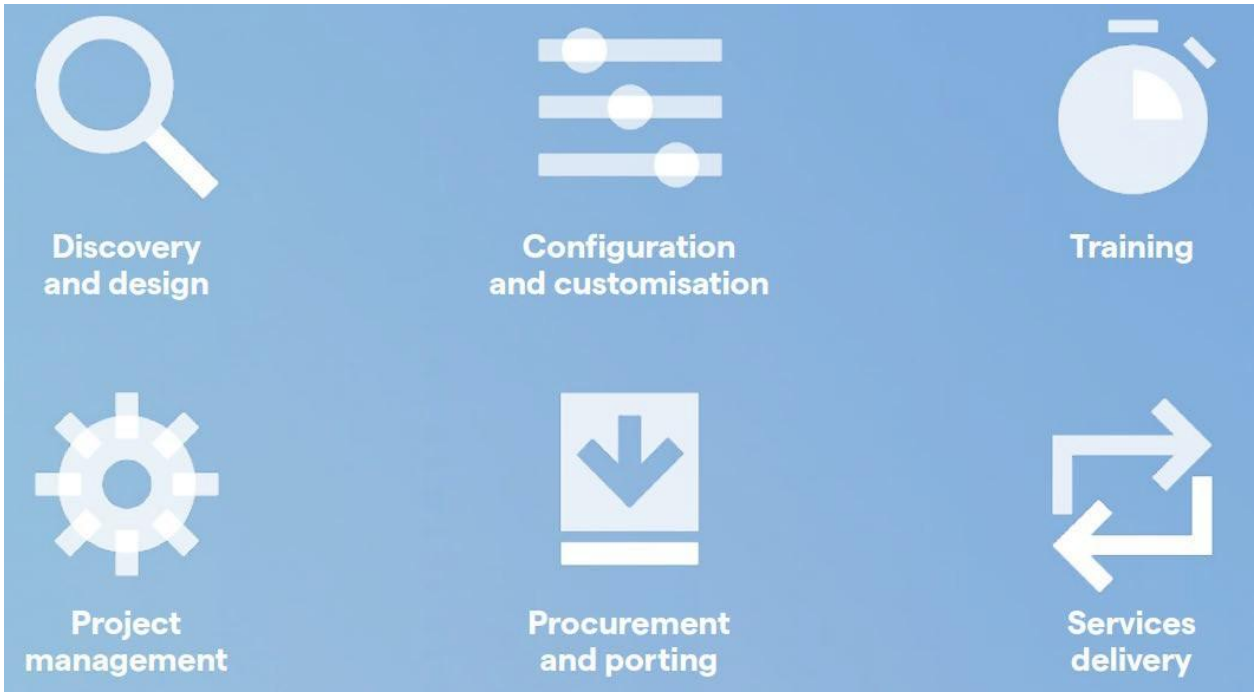
For more information, see https://help.mypurecloud.com/articles/genesys-cloud-fair-use-policy/.

Project Delivery, Migration and Transformation

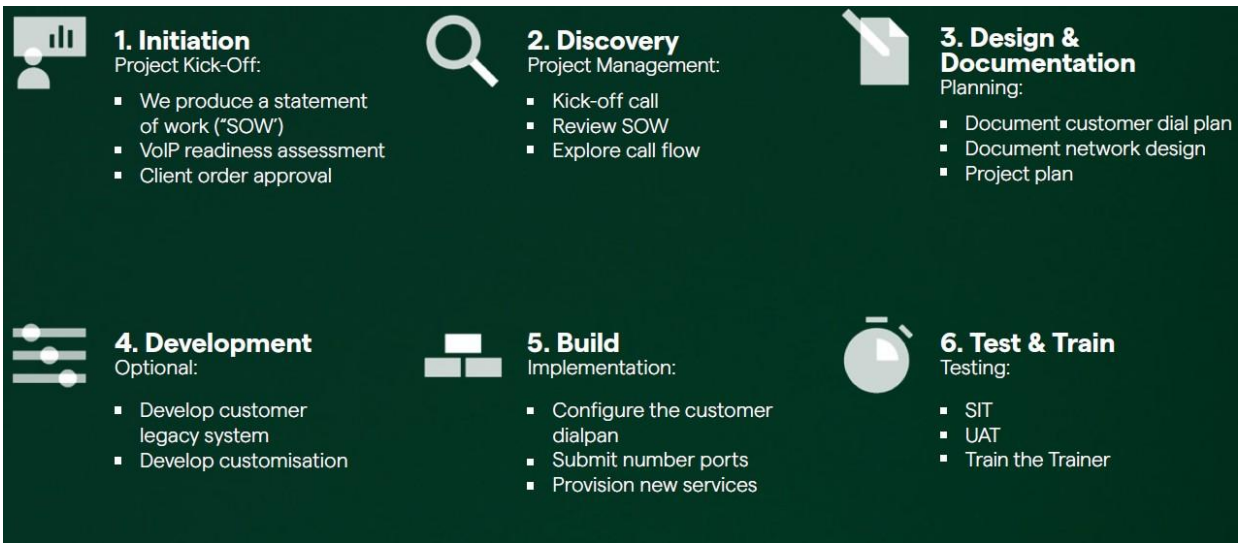
Process and Methodology

Kerv offers a range of professional services with the right options to fit your business needs. Genesys Cloud is an intuitive platform and therefore customers have the opportunity to do their own setup and completely configure their system. There is a help section (www.help.mypurecloud.com) with tutorial videos and guides to assist you in getting the most out of the platform. Customers looking for more assistance and training should consider engaging Kerv with the deployment project.

Whether you want to configure your own contact centre, or want a professional project managed roll-out, we're here to help. Kerv are with you every step of the way with project delivery. Our professional service engineers and project managers have been implementing contact centre solutions for customers for almost 20 years. Fully accredited, we can ensure your contact centre platform perfectly aligns to your customer engagement goals. As no contact centre is the same, Kerv's implementation services are tailored to suit:



Methodology and implementation



Using the service

Ordering and Invoicing

Please contact Kerv at sales.experience@kerv.com or 0330 403 0000 if you would like to:

- Send through your requirements
- See a demonstration of Genesys Cloud
- Learn more about Genesys Cloud or Kerv
- Place an order for Genesys Cloud.

Availability of Trial Service

Genesys Cloud is available on a 30-day trial basis. The full feature set of Genesys Cloud is available to trial. Please contact sales.experience@kerv.com for full details.

On-Boarding, Off-Boarding, Service Migration, Scope etc.

Kerv employ a structured approach to project management for the delivery of Genesys Cloud when engaged by a customer to run the deliver project. The methodology is a truncated form of PRINCE2 as befits projects of the size and scope of typical CCaaS deployments:

The key project personnel are:

- Kerv Project Manager to ensure risk management and progress to time and budget
- Kerv Lead Professional Services Engineer to document customer design and ensure service build in line with agreed documentation
- Kerv Account Manager with commercial accountability to the customer
- Kerv Customer Success Manager with accountability for business outcomes

- Customer Project Manager, responsible for ensuring customer accountabilities are delivered under the project plan
- Customer Senior User as the decision maker for defining customer requirement. Typically, this will be an experienced administrator
- Customer commercial stakeholder, budget holder and project champion.

A project follows the following stages:

1. PROJECT INITIATION

During this phase Kerv will:

- Arrange a kick-off meeting to confirm order contents, key timescale assumptions and introduce project personnel
- Establish meeting schedule for project progress monitoring.

2. DESIGN

Via a series of calls and/or meetings with the customer, capture sufficient information to enable preparation of:

- Low Level Design ("LLD”) of network connectivity
- Configuration Check List ("CCL"), which documents the required dialplan and functionality that must be configured. Inbound routes, schedules, hunt groups, IVR, extensions etc.
- Initial Go-live strategy.

Progress to the BUILD phase is gated on an approved CCL, which is then placed into Change Control to prevent project scope 'creep'.

KEY MILESTONE – Agreed CCL. This must be complete before configuration and provisioning can commence.

3. CONFIGURE / PROVISION

Although a project is usually Genesys Cloud specific, there is the potential for other (auxiliary) services to fall within the scope of a project to ensure completion. For example, the porting of existing telephone numbers or the provision of internet access services.

KEY MILESTONE – Integration Test Completion. Internal integration testing by Kerv prior to handover to the customer.

4. TRAINING & UAT

Two phases of UAT are scheduled. Phase 2 after any defects have been corrected. User training often delivered in parallel with UAT.

KEY MILESTONE – UAT Sign-off. Formal acceptance by the customer that the service performs as described by the CCL.

5. GO LIVE
Includes

- Handover to Kerv Service Delivery team for post deployment support
- May include on-site triage if required.

KEY MILESTONE – Signed Customer Acceptance Certificate The project is controlled via the following documents:

- Statement of Work ("SOW") which scopes the project including roles and responsibilities
- CCL / LLD which are the documents that deliverables are measured against
- Project plan, prepared using MSProject circulated in PDF
- Go-Live Method of Procedure - which details the go-live plan and any phasing necessary
- Project Log or RAID, detailing actions, risks etc as the project progresses.

The project plan clearly identifies key dependencies. Dependencies include:

- Customer bandwidth capacity and internet security capability
- Customer resource being available as required to complete discovery, UAT, user training, and any agreed go-live activities
- Third party service delivery, for example number porting or additional internet bandwidth.

The project plan and RAID are reviewed regularly (weekly as a minimum) to ensure risk management and progress verses plan.

Where a customer wishes to stop using Genesys Cloud and move to another provider, 90 days' notice is required from the customer. Kerv will provide all reasonable assistance in off-boarding from Genesys Cloud and will allow the customer to export via API all customer data. Porting telephone numbers away from Kerv will be the responsibility of the gaining provider but Kerv shall assist where possible in this process.

Communication and Governance Plan

Kerv gated project management methodology ensures levels of governance are in place to check a solid foundation that exists in the current stage before opening the next. For example, to move the project into 'implementation' requires fully documented, and signed-off, contracts, terms and conditions, and project scope.

In addition, the purpose of the governance model is to ensure delivery of Genesys contact centre services that meet agreed quality, timeframe and cost objectives. It will also determine, authorise and prioritise changes in service to support evolving business objectives.

Kerv recognises that the success of the overall governance framework will in no small part be dependent based on the relationship that will exist between Kerv and our customers. The overriding principle behind such a relationship is the need for openness, transparency and trust between our customer organisations and Kerv. The creation of an integrated and collaborative partnership between the two parties will help promote the level and quality of communications required for the successful execution, ongoing development and improvement of the IT governance procedures.

Kerv will implement a joint governance model, aligning with our counterparts Executive and Senior Management in order to provide overall governance - at both a contractual and a strategic level. This will ensure that strategy and communication feed up and down the Kerv organisation and across to our customers.

This tiered approach to governance will allow the management of service delivery to be delegated effectively to the appropriate levels within customer and/or Kerv teams. Issues are handled at an appropriate level and escalated when required, although Kerv believes that by working in partnership we would adopt a more proactive approach that would prevent issues becoming major escalations.

At a tactical level, the Kerv Support Organisation and operational teams will engage with the relevant stakeholders in customer service management function and wider business, in order to provide a robust service delivery experience.

The formal Governance Plan will cover:

- Project structures
- Organisational structures
- Project team structures: Kerv and customer
- Roles and responsibilities of all organisations: Kerv, and customer
- Reporting and governance forums
    - Daily, weekly and monthly forums: various checkpoint, tracking, planning and RAID forums
    - Joint steering group
    - Design workshops and work steams status
    - Intersection points
    - Ah-hoc opportunities
    - Commercial reviews: milestones, change requests
    - Includes: timing, attendees, inputs, outputs and authorisation level

- Escalation paths
    - Escalation structure, point of contact and procedures
    - Escalation timings: auto escalation and responses
    - Levels of escalation: based on severity and impact
    - Formal escalation templates
- Deployment plan
    - Dates of task and associated resources
    - Critical path review
    - Timeline(s) of all delivery milestones
    - Weekly review and publication.

Termination Process

The Customer may cancel this service at any time by giving not less than 90 (Ninety) days' notice in writing served to Kerv provided that:

a) If such cancellation is effected during the term, in addition to the Customer being liable to pay Kerv for all charges incurred by the Customer up to the effective date of cancellation (including all interest), the Customer must pay the cancellation charges set out below on or before the effective date of cancellation and it shall not be effective until the last day of the month in which the notice period shall have expired.

b) The Customer agrees to pay the cancellation charges as set out below:

    i. an amount equivalent to the charges which the Customer would have been liable to pay for the remaining balance of the term, plus VAT at the required rate; and

    ii. an amount equal to the average call charges invoiced to the Customer each month over the lifetime of this Agreement, plus VAT at the required rate.

CX Consultancy

With organisations pushing the pace of CX evolution and driving ever-increasing customer expectations, keeping up can be a daunting task.

Well-designed self-service across web, chat and voice can provide a quick and convenient customer experience, whilst reducing the cost to serve; however, careful design is critical, as is a holistic approach that provides a consistent and joined-up experience across self-service, agent supported and agent-led journeys.

Kerv is the UK's most experienced Genesys Cloud CX service partner. Alongside our award winning, technical design, delivery and support, our consultancy team is focused business-led process analysis and design.

Kerv consultants will invest time to understand your business strategy, your challenges and your vision. They also analyse your contact centre operation alongside your current online, digital and voice journeys. They will then collaborate with your team to design a CX improvement program that combines CX best practice with the power of the Genesys platform to solve your business challenges and accelerate progress towards your business goals.

CX Express

CX Express provides a high-level analysis or your contact centre and related customer journeys. The output is a set of five recommendations to give your CX program direction and focus.

CX Express Includes:

- Introduction & Planning Workshop (30 minutes)
- Business Context Workshop (90 minutes)
- Contact Centre Operations Workshop (90 minutes)
- CX Recommendations Report
    - Top five recommendations. Where possible, we include a high-level view of projected savings versus implementation effort.
- Recommendations Workshop (60 minutes)
    - Walk through report to validate recommendations, check any assumptions and agree action plan.

CX Explore

CX Explore provides a full analysis of your contact centre and related customer journeys. The output is a set of ten high-level recommendations to give your CX program direction and focus. CX Express Includes:

- Introduction & Planning Workshop (30 minutes)
- Business Context Workshop (90 minutes)
- Contact Centre Operations Overview Workshop (90 minutes)
- Quality & Training Workshop (90 minutes)
- Workforce Planning Workshop (90 minutes)
- For each contact centre team:
    - Team Operations Workshop (60 minutes)

- Agent Shadowing (60 minutes)
- Mystery Shopping
- CX Recommendations Report
- Top ten recommendations. Where possible, we include a high-level view of projected savings versus implementation effort.
- Recommendations Workshop (90 minutes)
- Walk through report to validate recommendations, check any assumptions and agree action plan

CX Assist

CX Assist is a bespoke engagement that is typically used to help a customer to solve a specific business challenge or consult on the launch of a new service such as a chatbot or new channel. The output is a report that describes the challenge/requirement, best practice principles, a high-level overview of the recommended solution, the projected financial costs and savings. CX Assist Includes:

- Scoping & Planning Workshop (90 minutes)
- Business Context Workshop (90 minutes)
- Focus Workshops (number & duration dependent on scope)
- CX Recommendations Report
- Description of challenge/requirement
- Overview of recommended solution (the content will depend on the scope but may include process designs and high-level architecture).
- Estimated costs & savings (initial & ongoing, internal & external)
- Recommendations Workshop (60 minutes)
- Walk through report to validate recommendations, check any assumptions and agree next steps.

Training and Resources

Genesys offers several training options, starting with online training courses and certification exams at Genesys Beyond, extensive documentation, videos and resource materials on the Resource Centre and bespoke trainer-led courses. It is important to choose the right level of training that matches your budget, resources, internal expertise, and culture.

Training

Some courses and tutorials are available free of charge on the Genesys Beyond training portal: https://beyond.genesys.com/explore/home.

Additionally, the Genesys Cloud Learning Subscription provides access to all available training for Genesys Cloud and any new content released during the year of an active subscription. In addition, subscribers receive vouchers for Genesys Cloud certification exams. A single learning subscription provides access for one individual. It is ideal for any users that are responsible for the business and/or technical aspects of their Genesys technology, such as contact centre management, system administration, or integration.

Currently Included in the subscription:

- Genesys Cloud Implementation PC-DPL
- Genesys Cloud Contact Centre Administration PC-CCA-ADM
- Genesys Cloud Reporting and Analytics PC-R&A-USE
- Genesys Certified Associate Certification (GCA)
- Genesys Certified Professional Certification (GCP)
- Access to expert-led Skills lab within the Genesys Community
- Admission to CX Education Day
- Access to the course e-book library.

Genesys will also provide Train-the-Trainer Knowledge Transfer as a part of the Professional Services engagement, which will show and guide your Trainers through the way Genesys Cloud works, and the way your specific instance is configured and functions. We are also able to provide you with presentations that can be used by your Trainers when delivering the training to the end-users.

Other Resources

The Genesys Cloud Resource Centre is the comprehensive home of all Genesys Cloud instructional and educational information. This online tool (https://help.mypurecloud.com/) is available for any user of Genesys Cloud and is offered for free.

Users may browse through the categories for articles of interest, use the glossary to look up pertinent definitions, explore the video library for education and product simulations, check the FAQs prior to asking for help, read through industry insider content for industry insights, check out release notes for a summary of new features, enhancements, and critical bug fixes, or use the search feature to locate specific information.

The videos section includes step by step recorded guides, organised by role, demonstrating how to complete common and challenging tasks in Genesys Cloud.

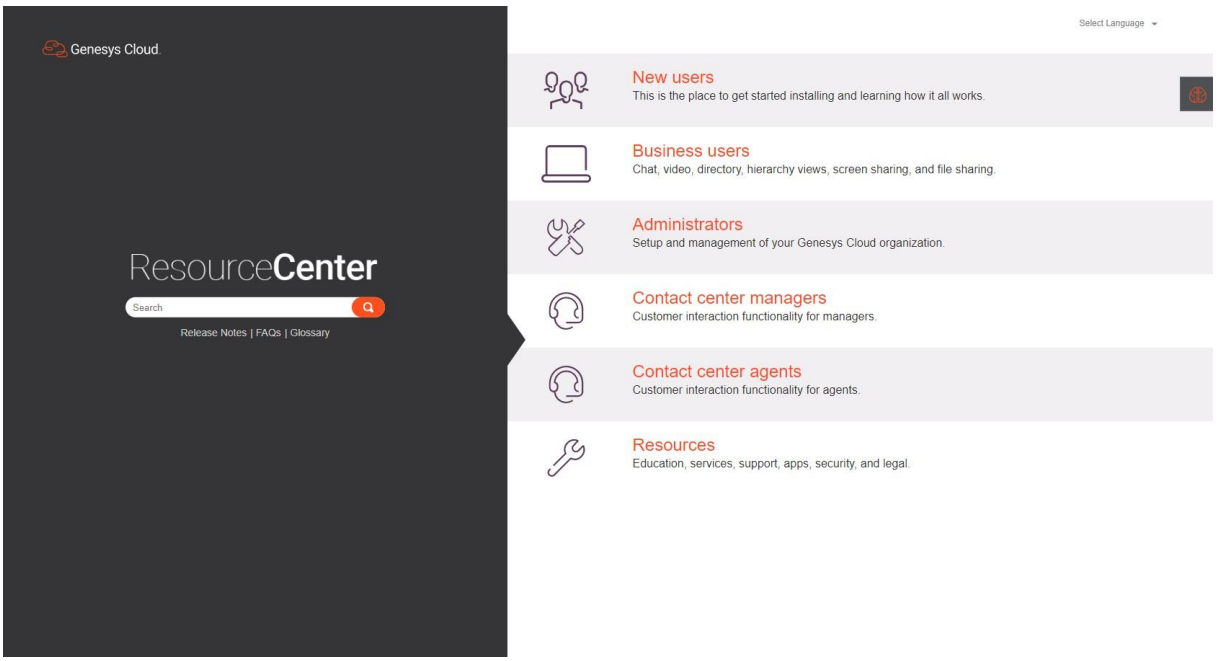
Popular video topics include:

- Transferring interactions

- Managing chat interactions
- Placing calls on behalf of queues
- Completing after-call work.

And many more through the online link at (https://help.mypurecloud.com/video/).

The Genesys Technical Communication and Training teams update Genesys Cloud Resource Centre content on a weekly basis.



All screens of the Genesys Cloud user interface display a help icon that provides access to the Genesys Cloud Resource Centre with rich context sensitive help.

The developer tools (https://developer.genesys.cloud/) allow you to test extended functionality in your Genesys Cloud organisation without directly using an API. Through a user interface, you can send requests to the APIs, no programming required. The developer tools authenticate against your Genesys Cloud organisation and use data from your Genesys Cloud organisation. With some of the tools, you can produce code to give to your developers. The code can help them create programs for retrieving and changing data in your Genesys Cloud organisation.

Customer Success and Care

Customer Success Management

Kerv and Genesys use a customer success framework to help make our customers and partners successful.

Technology only gets you so far; maximising the value of your investment depends on people. Customer Success is designed to help you use Genesys technology to its full potential, so you can run the types of interactions that win customers and beat the competition.

Customer Success is more than a framework of guidance and services, it's a philosophy. It means that we proactively drive success by helping you prepare with education, best practices, and readiness assessments; by creating an adoption outcome at launch that will help you see early results; by staying with you as your journey continues, aligning how we work with you based on your business objectives and goals; and by helping you adopt additional features to expand your customer and employee experience.

Customer Success consists of three key components:

1) Clear goals — Jointly develop a vision of what success looks like and how to track progress every step of the way
2) Expert guidance — Receive coaching and recommendations along the way from your Ker and Genesys Customer Success Manager (CSM)
3) Accelerated results — Realise rapid results with engagements tailored to all phases of your CX journey.

Clear goals

There's no one-size-fits-all plan for CX success. Every company is unique and has different challenges. Together, you and your Kerv CSM will define what "success" means to you and then create an actionable plan that drives the results you require to justify your operating expenses. You'll never wonder what your next step is or whether you're hitting your targets. Rely on our expertise to illuminate a path between you and your objectives.

Clear goals refer to the Customer Success Plan (CSP) that the Kerv CSM develops with you and tracks to completion.

- Mutually agreed-upon success plan
- Tracks and enables business outcomes
- Managed during customer touchpoints
- Focuses on one of the 6 key focus areas (revenue, cost, profit, CX, employee experience, or regulatory and legal compliance)
- Revisit annually, quarterly, or another cadence.

Expert guidance

Your Kerv CSM becomes your trusted guide on Day 1. From onboarding to go-live and along your steady state, you'll have access to a CX professional who knows your business and can recommend the best way forward. Your CSM assists you as you move from phase to phase in your journey, providing a single point of contact to all of the various expertise Genesys has to offer for solving specific problems. Reach out to your Kerv CSM to find out what your next step is towards success.

Expert guidance refers to the CSM as the customer's single point of contact.

- Assigned mentor to provide ongoing guidance and recommendations
- For smaller customers, digital channel access to a team of experts
- Onboarding guidance
- Customer Success Plan development and tracking
- Service recommendations
- Renewal recommendations
- Training recommendations
- Product update notifications
- NPS closed loop program
- Executive Business Reviews.

Accelerated results

We believe that establishing a strong operational foundation is important to your growth. Customer Success equips you with a collection of tools, best practice guides, and recommendations to help you evaluate and strengthen your processes.

We also know your needs change from year to year, and that's why we provide the CSM function and service with a wide variety of optional business and technical engagements to get you through onboarding, launch, ongoing use, optimisation, evolution, and all the unexpected obstacles that can pop up along the way. From refining your testing strategy to optimising your omnichannel experience to fast-tracking a dialler campaign, we can accommodate your need to adapt to changing times with a tailored experience year after year.

Support Services

	Assure	Managed Service
Incident Management	Standard or Extended Hours (24x7) available	Standard or Extended Hours (24x7) available
Service Requests		Included*
Request for Change		Included*
Consultancy		Included*
Training		Included*

*Included – as part of your service contract you will be entitled to a monthly number of hours to be utilised across these services. Your entitlement can be rolled over for 3 months with the oldest time utilised first. All service requests are tracked in minimum increments of 0.25 hours.

Service services detail

Incident Management

Proactive monitoring of network and platform components provided by Kerv Experience. Work with customers to resolve issues.



Two support packages are available:
Standard hours: 8:30 am to 6:00 pm Monday to Friday (excluding England bank holidays)
Extended hours: 24x7

Regardless of support package, support is provided for priority 1 incidents 24x7.

Service Requests

Low-risk requests (configuration only). Can be utilised for the following:

User Changes	Prompt Changes	Schedule Changes
New User	Replace existing prompt	Add time to existing schedule
Modify User		
Remove User		

Request for Change

Changes which require an impact assessment of implementation complexity, time and risk and explicit customer approval before change can be undertaken.

Changes which require more than 1 day of effort may require a detailed statement of work, discovery workshop and project management. These changes are included within the service and will be managed by your Account Manager as a project managed change.

Platform Guidance

Guidance on how to configure platform features can be used to establish the requirements for a request for change.

Services in Scope

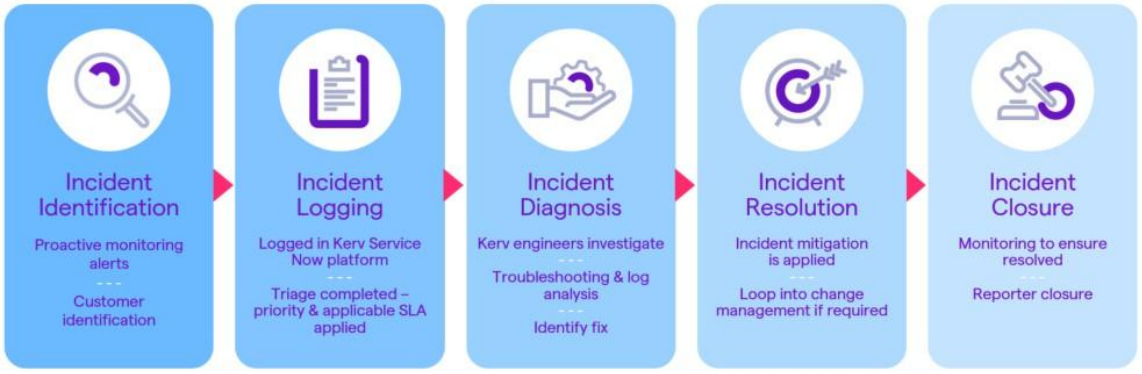
The following services are in scope within the applicable support offering:

- Genesys Cloud Platform
- Genesys Cloud Edges. Edges hosted by a customer require customer assistance to complete on-site tasks such as edge restarts or replacements. The customer will need to mee the Genesys network requirements to ensure stable operation. The customer will need to ensure Genesys warranty is active in the event of a hardware issue.
- Kerv Experience telephony services
- Kerv Experience CX applications
- Network services supplied by Kerv Experience.

Incident Management

Overview

Kerv follows ITIL principles for the resolution of any incidents, and the following high-level incident management process is adopted by the Kerv Service Desk.



Incident prioritisation

In the event of an incident affecting your service, we will prioritise our response by assessing the impact and urgency of the incident.

		Impact		
		High - System Wide Service line, Work-Function, Business Unit, Department, Location	**Medium - Multiple Users** Several users	**Low - Single User** Single user
Urgency	**High** Real-time communication with customers unavailable	P1 - High	P1 - High	P2 - Moderate
	Medium Work functions impaired	P1 - High	P2 - Moderate	P3 - Low
	Low Inconvenient	P2 - Moderate	P3 - Low	P3 - Low

Incident service level schedule

Service levels are defined by the priority level of the incident and whether the incident occurs during the standard working hours of the Service Delivery Team.

The target assigned is met when an engineer has read, prioritised, and assigned a request. After assignment, the engineer has a restore target, indicated in the table below. All service level targets are paused while awaiting information from the customer or a third-party supplier.

Genesys Cloud & Kerv Products / Services

Standard Hours

8:30 to 18:00 Monday to Friday (excluding England public holidays)

Incident Priority	Target Response	Target Restore
Priority 1 Incident	30 min	2 hours
Priority 2 Incident	1 business hour	4 business hours
Priority 3 Incident	2 business hours	24 business hours

24x7

Incident Priority	Target Response	Target Restore
Priority 1 Incident	30min	2 hours
Priority 2 Incident	1 hour	4 hours
Priority 3 Incident	2 hours	24 hours

Custom Software

Standard Hours & 24x7

8:30 to 18:00 Monday to Friday (excluding England public holidays)

Incident Priority	Target Response	Target Restore
Priority 1 Incident	1 hour	9 business hours
Priority 2 Incident	1 business hour	18 business hours
Priority 3 Incident	-	-

To maintain a high quality of service and prioritise issues appropriately, Kerv Experience requires that all cases are actively worked on by the requestor. Tickets that have not been responded to in five business days are automatically resolved. Likewise, cases that are in resolved status, with no reported issues, are closed at the end of the fifth business day.

Support Tiers

Tier	Description

Tier 1 - Customer Service Desk	This is the customer function that triages internal trouble tickets. They are responsible for triaging internal issues and collecting a description of the issue, steps to reproduce (if possible) and advising of the impact of an issue.
Tier 2 - Kerv Service Desk	This is the Kerv Service Desk, who are Genesys Certified Professionals. They are responsible for managing the resolution of all issues reported to Kerv. They investigate the issue, analyse log files, and check the Kerv knowledgebase for known solutions. They will either resolve the issue, raise it to Tier 3 or advise the customer on how to resolve an issue.
Tier 3 - Kerv Development Team	The Kerv development team are responsible for the resolution of any incidents that cannot be resolved by the Kerv Service Desk. They also manage the resolution of application bugs through the software development lifecycle.
Tier 3 - Genesys Customer Care	Genesys software vendor of the Genesys Cloud application. In the event an issue cannot be resolved by Kerv, Kerv will raise a case with Genesys and manage the case with Genesys.

Incident reports

In the event of a Priority 1 incident (critical) the customer can request an incident report from Kerv Experience. This request should be made via the existing ticket and Kerv Experience will supply the customer with the report within 5 business days. The report will include the impact, timeline, root cause and preventative measures.

Request & Change Management

Request services level schedule

The target assigned is met when an engineer has read, prioritised, and assigned a request. After assignment, the engineer has a completion target, indicated in the table below. All service level targets are paused while awaiting information from the customer or a third-party supplier.

The services described here are only available within the Managed Service offering, customers with Genesys Cloud Support may request these, but they will not be subject to the targets detailed below and will be chargeable at the standard hourly rate.

Working hours

8:30 to 18:00 Monday to Friday (excluding England public holidays).

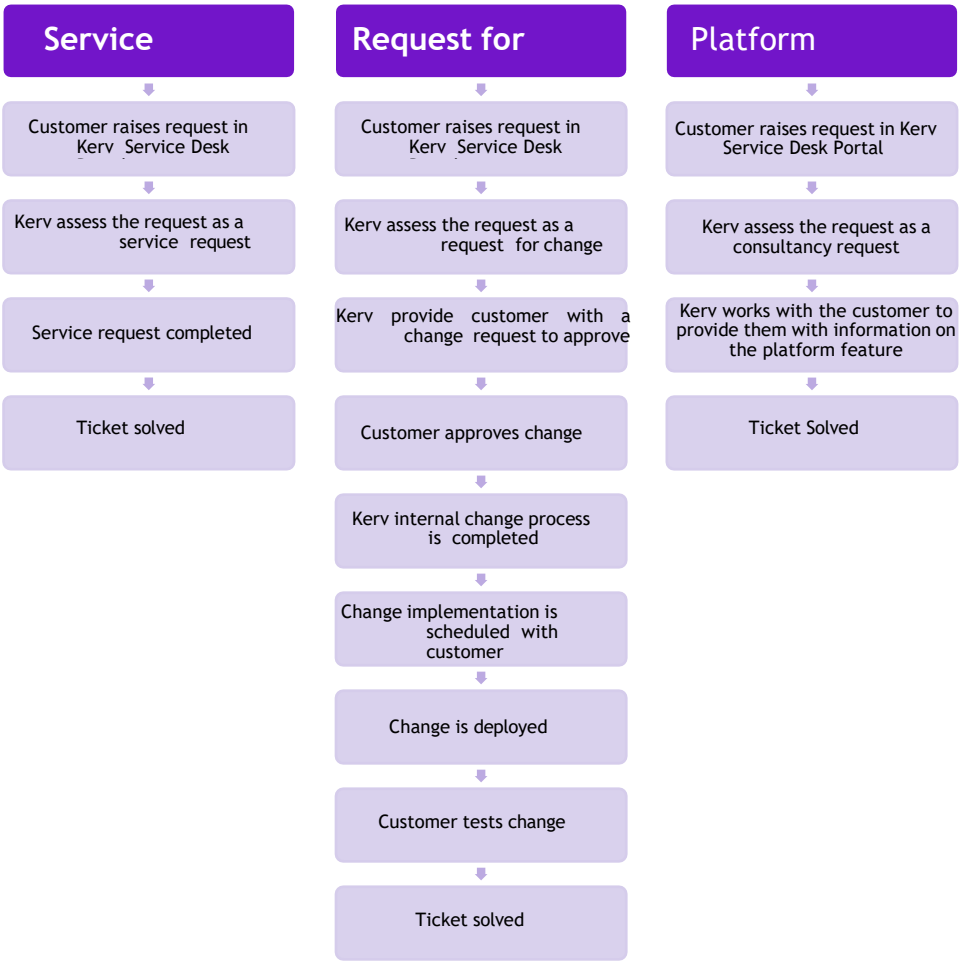
Request Type	Target Response	Target Completion*
Service Request	1 hour	1 day
Request for change	1 day	5 days
Platform Guidance	1 day	5 days

*Completion for requests for change is the completion of the change request assessment form by Kerv

Experience to the customer to allow the customer to assess the change and schedule the implementation. All requests for change are subject to the change management process and subject to approval by Kerv Experience CAB. For consultancy and training, completion is the allocation of an engineer.

Request Process

When a service request is submitted by the customer, the following process will be followed.



Data protection

Information Assurance

Kerv are ISO 27001:2013 Certified and hold Cyber Essentials Plus Certification

Data Back-Up, Data Restoration and Disaster Recovery

In line with Kerv's ISO 27001:2013 Policies, Kerv's infrastructure and associated services is designed with resiliency and stability of service in mind. There is no single point of failure within the design methodology and daily back-ups are taken of all configuration data ensuring speed of data restoration in the event of a disaster. These are captured in Kerv's BCDR Policies.

Information security is of paramount importance to Kerv and therefore the organisation has sought to demonstrate this commitment through alignment with the ISO 27001:2013 standard. The Management Team has ensured that management commitment and required resources are allocated to make sure information security controls are implemented and an Information Security Management System (ISMS) established to minimise the risk to Kerv and our clients. Furthermore, the organisation will continually review and improve its approach to information security to ensure that it can effectively respond to the evolving landscape of threats which face the organisation.

Kerv's ISMS has been designed to preserve:

Confidentiality - Access to Data shall be confined to those with appropriate authority

Integrity - Information shall be complete and accurate. All systems, assets and networks shall operate correctly, according to specification

Availability - Information shall be available and delivered to the right person, at the time when it is needed

The plan critically demonstrates our compliance with best practice and provides assurance to Kerv management team, customers and other stakeholders. It is essential that the business continuity plan is effective and so will be regularly reviewed and exercised through rehearsals.

A more detailed plan can be provided to buyer on request.

Privacy by Design

Kerv are registered with the Information Commissioners Office registration number ZA227977 and are also committed to:

- Protection of Personal Data in line with Data Protection Legislation and Information Security best practice
- Continuous improvement of the privacy management, processing activities and personal data lifecycle management.

Kerv is committed to preserving the privacy of our staff, customers and their customers, business contacts and suppliers; as well as ensuring personal data is collected and managed in compliance with the following GDPR principles, namely that it is:

a) Processed lawfully, fairly and in a transparent manner in relation to individuals (lawful, fair and transparent);
b) Collected for specified, explicit and legitimate purposes and not further processed in a manner that is incompatible with those purposes; further processing for archiving purposes in the public interest, scientific or historical research purposes or statistical purposes shall not be considered to be incompatible with the initial purposes (purpose limitation);
c) Adequate, relevant and limited to what is necessary in relation to the purposes for which they are processed (data minimisation);
d) Accurate and, where necessary, kept up to date; every reasonable step must be taken to ensure that personal data that are inaccurate, having regard to the purposes for which they are processed, are erased or rectified without delay (accuracy);
e) Kept in a form which permits identification of data subjects for no longer than is necessary for the purposes for which the personal data are processed; personal data may be stored for longer periods insofar as the personal data will be processed solely for archiving purposes in the public interest, scientific or historical research purposes or statistical purposes subject to implementation of the appropriate technical and organisational measures required by GDPR in order to safeguard the rights and freedoms of individuals (storage limitation);
f) Processed in a manner that ensures appropriate security of the personal data, including protection against unauthorised or unlawful processing and against accidental loss, destruction or damage, using appropriate technical or organisational measures (integrity and confidentiality).

Also, Kerv may act as the Data Controller or Data Processor and as the Controller or Processor it shall be responsible for and be able to demonstrate compliance with GDPR ('accountability').

Kerv will only process personal information where this is strictly necessary for legal and regulatory purposes, or for legitimate organisational purposes, where data gathered and processed will be kept to the minimum required for the purpose.

In order to ensure that Kerv processing of personal data does not impact on the privacy rights or freedoms of individuals; we will operate on a privacy by design basis. This means from the outset of a project or initiative we consider how our actions and processes may affect individual's privacy.

Taking this approach will identify and reduce the risk to individuals' privacy by identifying issues early so they can be mitigated, protecting and reassuring our customers. This will include risks associated with:

- Relevant privacy laws, standards and frameworks;
- The impact on the rights and freedoms of natural persons;
- Any physical, material or non-material damage to natural persons; and
- The impact on the organisation (including, but not limited to reputation, regulatory action, financial loss, etc.);

To ensure Privacy by Design Kerv will Conduct Data Protection Impact Assessments (DPIA's) when introducing technologies or initiatives which could present a high risk to the rights and freedoms of individuals. Kerv will ensure that data is not processed until the DPIA has been reviewed and systems tested.

Our experience

Ceredigion County Council

Overview

Based in the town of Aberaeron, Ceredigion County Council serves around 72,000 citizens, 25% of whom are over 65 years of age. Like most local authorities, it faced the perpetual challenge of doing more with less: improving public services against ever-reducing budgets. A task made even tougher when the pandemic forced contact centre staff to work from home.

The Challenge

Enable home working with minimal service disruption, while maximising cloud and omni-channel innovation.

“Thankfully, we were already onboard with Kerv Experience and Genesys Cloud,” says customer services manager, Anna Gawthorpe. “That meant moving our supervisors and 20-plus advisors to remote working was pretty painless. They took their laptops home Friday and were up-and-running on Monday morning.”

The Solution

The foundations for the smooth move were laid two years earlier when the Council was managing multiple numbers and hunt groups, and battling siloed communication, without the benefit of central reporting.

Choosing to replace its on-prem telephony system with an agile Genesys Cloud contact centre, Kerv Experience specialists worked alongside the Council’s IT team to ensure everything was set up to get the best from the new platform.

The Result

The Genesys Cloud solution ensured there was no productivity loss. Home-based agents continued to handle 9,000+ calls a month, supporting local communities with a reassuring voice at the end of the phone during times of great uncertainty.

The situation was worsened by the launch of the NHS Track and Trace app, which generated extra calls from customers seeking guidance. The system handled them with ease. “It was important we were there when our customers needed us most, assisting with issues ranging from COVID-19 advice and refuse collection to free school meals and housing benefit enquiries,” says corporate manager, Joy Lake.

GREATER CARE AND UNDERSTANDING
Although at the start customers tended to make allowances, their tolerance levels changed during lockdown. Aided by improved reporting and call handling, the Council was able to closely match agents to specific situations, making flexible use of 17 different skill sets.

“Showing empathy and understanding is a natural part of the job, although it was needed more than ever during the crisis,” continues Lake. “This was reflected in our KPIs with, for example, average handling time increasing by a couple of minutes.”

WORKING SMARTER, NOT HARDER
With the old set-up, agents used to work in the dark, not knowing whether the customer had called before or who they had spoken to. “Kerv Experience helped integrate Genesys with our CRM system,” says Gawthorpe. “Now, it automatically calls up customer histories and case notes. So, they don’t have to repeat everything. And we’re able to resolve issues faster, while saving time on post-call work like logging details and follow-up actions.”

The Council is already planning its next Genesys-assisted innovation. “We can see a number of use cases for introducing web chat,” concludes Lake. “For example, a customer might want a date for their next bin collection, a blue badge form, or to book something into a recycling centre. Simple changes that, once again, will make a big difference.”

Full case study can be found here: Ceredigion County Council: Always There for Local Communities - Kerv

National Highways

Overview

Traffic jams, lane closures and resultant vehicle delays make a huge dent in economic activity, stopping businesses putting products on shelves and consumers from spending money.

Metrics matter. Incident management and resolution delays are closely watched, with time lost per vehicle per mile as a key measure to monitor costs.

For this essential service the client's contact centre needed to migrate from an expensive and outdated on-prem system to the cloud with the minimum of disruption. Kerv Experience was chosen to implement the solution, read on for more details.

The Challenge

The goal was always to prioritise and handle every call with the utmost efficiency. This was made complicated due to a legacy phone system which struggled to filter calls and relied on drivers pressing buttons to navigate IVR options, putting safety at risk too.

As events snowballed, agents could end up fielding calls for issues that were already being resolved, further compounding matters. The on-prem system was also expensive to maintain and unable to effectively support remote working.

The Solution

In collaboration with Kerv Experience, the agency set about transforming its contact centre. The goal was frictionless customer and employee experience. Success would be defined by improvements to key performance indicators (KPIs) including increased first contact resolution and citizen trust, along with reductions in average handling time and cost per call. Maintaining compliance during and after the migration was another top priority.

Kerv specialists delivered the initial project in just seven weeks. Blending Genesys Cloud with Kerv hosted voice services and Amazon Web Services, the solution makes best use of edge servers while simplifying call routing and making best use of agent skills. Unlike before, contact centre staff benefit from call recording and returning customer information. Handlers have a more holistic reporting view as incidents unfold, for example from roadside cameras. The contact centre solution is also linked to the agency's Microsoft Dynamics CRM system and eMite wallboards, leveraging previously buried or siloed data.

The Result

In providing a solid foundation for the agency to achieve KPI improvements, the Kerv cloud contact centre solution also underpins wider organisational targets. Along with a **90 percent average for customer satisfaction**, the agency is better placed to maintain a strong safety record with **97 percent road network availability** and **85 percent of all motorway incidents cleared within an hour**.

The Kerv solution was easy to extend beyond the contact centre, enabling HR teams and claims handlers to enjoy the same benefits.

Building on that success, the agency rolled out the new cloud platform across its HR function. "We have one central and nine local HR teams," adds the spokesperson. "Due to busy workloads our helpdesk used to suffer, resulting in high abandonment rates and cases being raised via other channels. Now, service levels are back to where they should be. Employees get served faster and many HR people are happier working from home."

Similarly, claims handlers now benefit from feature-rich cloud contact centre features. Before, the team operated in isolation with no technical support. So, customers would phone the contract centre, tying up agents who would invariably end up having to transfer the call. Through predefined intelligent routing, those callers are now connected to the right team first time, reducing stray traffic by 50 percent in the process.

Full case study can be found here:_CX and Digital Transformation within the Public Sector - Kerv

Somerset Council

Citizens living in the English county of Somerset used to be served by five separate local government authorities and multiple contact centres. Now, consolidated on the Genesys Cloud™ platform, a united Somerset Council is at the heart of public services delivery. Nine ultra-efficient digital assistants have replaced long, confusing IVR menus — cutting abandonment rates in half and getting customers to the right department 47% faster. Other results include reductions in wait times, above-target customer satisfaction (CSAT) ratings, and cost and time savings.

Full case study can be found at: https://www.genesys.com/customer-stories/somerset-council

Customers

Some of Kerv's public sector customers are:













