# Genesys PRESCRIPTIVE MIGRATION

The art of simplified migration with proven ROI









#### CONTENTS

- Envision what success looks like
- Define the plan to get there
- Migrate with confidence
- Achieve your desired business outcomes

#### Migration partnership

Contact center technology should empower you to know your customers and intelligently respond to them where, when and how they prefer. It should help IT teams use cutting-edge technology to easily deliver what your business needs with value that exceeds its cost. And it should give you a foundation to harness the power of artificial intelligence (AI), digital and cloud. If yours doesn't, it might be time for a change.

Retiring your current on-premises call center system can be an exciting — and daunting — time for your organization. Choosing the right partner can make navigating the migration journey easier and more predictable. Having an experienced guide matters.

Companies trust their migration to Genesys and our proven approach that's specifically designed to ease the transition to cloud from traditional on-premises systems.

HERE'S WHAT A FEW EXPERIENCED



#### **ATB** Financial

ATB Financial migrated its entire contact center infrastructure to the cloud-based Genesys
Engage™ solution in six months, replacing three disparate, legacy on-premises systems.



In a matter of weeks, Company
Nurse was up and running on
the Genesys Cloud™ plaform and
enjoyed an added 269% ROI with
a 4.8-month payback.

# Lowell ≫

Lowell Norway moved to the Genesys Cloud platform, realizing impressive results in just three months: a 26% reduction in average handle time, more than 90% increase in FCR and a 20% boost in agent productivity.



Westpac New Zealand moved from 39 siloed contact centers to a single virtual contact center.

# Successful migrations require an approach that empowers you

Eliminate unnecessary risks, costs and complexity with best practices and predictable delivery — accelerating time to value.

Genesys prescriptive migration is a proven approach designed to smooth your transition. Achieve your desired outcomes with migration that's on your path, at a deliberate pace, and with the right deployment model. Your migration isn't a project or a transaction; it's a relationship and a journey we take together. And that journey follows a simple plan:

- 1. Envision what success looks like
- 2. Define the plan to get there
- 3. Migrate with confidence
- 4. Achieve your desired outcomes

Leverage the experience of the one provider who's fully focused on customer experience and has a track record of investing in innovation. Prepare for the future with proven AI use cases, including predictive web engagement, voice and chatbots, analytics, and journey management orchestration. Avoid the risks inherent in aging systems and get the solutions that companies worldwide use every day to attract, delight and serve their customers.

LET'S DIG INTO THE DETAILS





Step one

# ENVISION WHAT SUCCESS LOOKS LIKE

## Start with discovery

Assess where you are. Envision where you want to be.

The first step is to assess your business needs and determine how to move forward. There should be a common understanding of current operations among stakeholders, including how you engage with customers, the state of your employee engagement and your operational practices. Once we objectively evaluate where your business is today, we can clearly see the path to get where you want to go.

With that objective in mind, first your team and our migration experts will work together to assess your current state and discuss your vision for customer experience. Then we collectively identify any gaps standing between you and that vision of success.

A holistic approach ensures we thoroughly cover your strategic, business, and operational goals and challenges. Together, we'll have a focused discussion about your prioritized goals and objectives, and we'll review your current and desired capabilities.

Depending on your priorities, we'll look for input from stakeholders in business, technology and functional areas.

Like your business, your migration will be unique. That's why our assessment approach focuses on you and your goals before we perform any analysis or make any recommendations.

"We wanted a **TECHNOLOGY PARTNER** that was going to help us go to the next level in terms of capability, that had a **PROVEN TRACK RECORD**, that was going to provide post-sales support to the degree we needed — and not rely on us to provide all the thinking around how the deployment was going to actually be delivered."

**Jason Lock** 

Head of Contact Centers, Westpac New Zealand

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Step two

# DEFINE THE PLAN TO GET THERE

# Your personalized migration plan

After jointly defining a migration strategy to deliver your ideal customer experience, our experts create your personalized migration plan based on your unique needs and timeline. We'll present your team with a complete proposal with all the components for a compelling business case.

You get everything you need to create consensus and keep moving forward.

"By just building out the right business case for our executive leadership team, we were able to easily gain their buy-in to move forward. Once they saw the technology improvements, the new capabilities, the flexibility — and then also the reduction in costs — it was a pretty easy sell from our perspective."

**Nicole Thomas** 

Coca-Cola Business Services North America



# Cloud deployment model

Find the cloud deployment model that's right for you.



# Financial justification

See a custom ROI and the cost of doing nothing based on your use cases.



# Migration plan

Get a detailed migration plan that's personalized and deliberately phased for your organization.



# CX vision demo

Explore what your post-migration future can look like with a custom demo.



# Timeline and pricing

Get a complete picture with estimated delivery timelines.

#### Architected for the cloud

Choose your cloud, your way, at a pace that's right for you. Whether it's public or private cloud, or a combination, get the flexibility to adapt as your needs change.

#### Getting ready to live the cloud life

You need to scale to any occasion, dynamically balancing resources to meet fluctuations in demand across every channel. And you need to do more with less — with infrastructure that requires fewer data center resources and is easier to manage. All this requires continuous access to innovation. Genesys has the right cloud for you, right now.

"Since implementing GENESYS ENGAGE, our average speed to answer and abandonment rates are 90% BETTER, and we've seen a 50% PECREASE in our transfer rate. It usually takes months to see efficiencies like these. We saw them starting within two days."

**Jamie Gladson**Senior Manager, Consumer Services Technology,
Whirlpool Corporation

#### Public cloud architecture

A multi-tenant, public cloud platform offers the highest level of agility and simplified solution management. An open platform lets you easily customize with API toolkits, extend with partner services and integrate with third-party products. Subscription-based services make it easy to scale up or down as your needs change.

Simple, stateless and secure components called microservices provide a powerful, reliable platform for managing change.

Genesys Cloud on Amazon Web Services (AWS) and Genesys Engage Cloud on AWS or Microsoft Azure consist of hundreds of these microservices — each of which provides specialized functionality:

On-demand scaling

- Reliability through recovery
- Fail-safe processing and testing
- · Continuous deployment

You also have telephony options:

- Genesys can serve as the telephony provider in many countries offering you a single vendor for telephony and contact center systems.
- For companies with dedicated carrier spend, we offer Bring Your Own Carrier (BYOC), which enables you to maintain your existing carrier relationship.

Buy a powerful, all-in-one Contact Center as a Service (CCaaS) solution to establish your new foundation in the cloud. Then build the rest — creating the ideal mix of capabilities for your unique business needs. Do all this through an ever-evolving platform that empowers users at all technical levels to adapt and differentiate. You gain the flexibility to consume services the way you want. A great example is Genesys Cloud, which is built to deliver the agility, efficiency and resilience you need to reliably respond to change.

#### Multicloud architecture

A multicloud architecture with Genesys Engage lets you choose which Infrastructure as a Service (IaaS) best suits your needs. Whether it is from a 'public cloud provider' like Microsoft with Azure or Amazon Web Services (AWS), a private hosted cloud provider of your choice or even on your own infrastructure, get all the power of cloud architecture, your way.

This multicloud architecture can combine — in a single network architecture — public and private cloud environments operated by different vendors. This approach can use hosted application services, cloud computing, storage and data services from multiple cloud provider entities (private, hosted, Infrastructure as a Service, Platform as a Service and Software as a Service). Genesys Engage multicloud offers these benefits:

- · "Cloudification" of on-premises or hosted services
- · Cross-cloud deployment
- Continuous innovation
- · Infrastructure resilience and scale
- Investment protection
- Superior security and control

Many Genesys customers are already leveraging these two architecture strategies to get the best of all worlds. Their contact centers are equipped for the future and they're harnessing the benefits of public and private clouds. And they're doing this without leaving behind all the years of unique customer experiences built into their ecosystems.

Genesys Engage customers deploy cloud according to their preferences — public, private or hybrid — with a choice of infrastructure providers, including Microsoft Azure, Amazon Web Services (AWS), OpenShift and Google. This

foundation means you can choose an optimal mix of users, capabilities and services to consume. And you maintain flexibility to change over time. Not only can you offer a unique experience to your customers, that flexibility extends to subscription plan pricing — giving you boundless options for long-term growth.

#### Hybrid cloud architecture

You tailored your contact center environment to provide your customers with specific, differentiated experiences. You have integrated a combination of best-of-breed systems and applications — each of those capabilities are a must. But you also want to harness the power of digital innovations and channels. And you want to use AI and machine learning-based solutions like workforce engagement management (WEM), predictive engagement and predictive routing that rely on the cloud's massive computing power. You have options with Genesys.

A hybrid cloud enables an on-premises contact center to combine with or extend to one or more public cloud Infrastructure as a Service (IaaS) providers like Amazon Web Services (AWS), Microsoft Azure, OpenShift Online or Google Cloud Platform (GCP). A properly architected hybrid cloud enables you to bridge the gap between your on-premises contact center and public clouds while containing costs and without sacrificing performance. Hybrid cloud gives you these high-level benefits:

- Cloud bursting to scale with peaks in demand
- Cloud-delivered innovations
- Instant global availability of applications
- · Enhanced security
- Hybrid cloud storage

Hybrid cloud gives you these high-level benefits:

CLOUD BURSTING TO SCALE WITH PEAKS IN DEMAND

\*

CLOUD-DELIVERED INNOVATIONS

\*

OF APPLICATIONS

\*

ENHANCED SECURITY

\*

HYBRID CLOUD STORAGE

## Integration: Making it easy

Creating an integrated portfolio of systems and services isn't always simple. The needs of your business change, as does the technology to meet those needs. Genesys provides simple integration methods and a robust marketplace, letting you plug and play — quickly and without disruption — as system and service providers change.

Our open APIs lets you customize integrations using public APIs, industrystandard developer tools and configuration points, giving you the flexibility to decide how your systems come together.

Browse the Genesys AppFoundry™ Marketplace to choose from a curated selection of integrations, applications and services that complement Genesys solutions to meet your specific requirements. You'll find CRM integrations, unified communications solutions, additional analytics tools, gamification apps and much more.

Here are some examples of how Genesys customers have used our options for simple, seamless integration to create amazing new experiences.

- Built an integration that linked interactions directly with a system of record, improving agent productivity and streamlining internal and external reporting to key stakeholders.
- Built a self-service app for capturing data in the field. A worker can start the reporting process through their mobile device and then immediately engage the contact center. All this significantly improves the employee experience and expedites the overall process.
- Used AppFoundry Marketplace applications for analytics and data visualizations to create numerous customized dashboards and reports to support an entire team and analyze data. The wide visibility to the company's internal teams and its customers reinforces its value for transparency.
- Used APIs to perform key business processes via SMS and webchat. Allowing a customer to begin a text conversation with an agent increases information capture, facilitates validation and continues to support a flexible, efficient process.

"Genesys Cloud is a building block. It's one of the foundations that our services are built on."

**Henry Svendblad** CTO, Company Nurse

### Genesys use case

As part of your migration strategy, Genesys use cases take the guesswork out of your customer experience transformation. We've already assembled product, service and best practices expertise into pre-built designs that are successfully tested and proven around the world. Predefined scope, timelines and budget mean faster deployment and time to value than traditional customer experience replacements that rely on custom-built solutions.

These well-defined designs for business and IT offer clear guidance to achieve maximum and incremental business benefits with minimal risk. And because they're easy to personalize, assemble and extend later with new capabilities, Genesys use cases offer predictable and measurable outcomes, such as:

- Improved customer experience
- · Reduced operational costs
- Increased revenue
- · Accelerated deployment with shorter time to value

The prescriptive migration process typically begins with Genesys use cases that support core functionality, like inbound voice. As your customer experience transformation continues, you're ready for more advanced, differentiating use cases like Genesys Agent Assist with Google Contact Center AI.

#### Documented Genesys use cases for each step in the scale of complexity

#### **Genesys Call Routing**



Genesys Agent
Assist with Google
Contact Center Al





## Migration reference architecture

Your customer experience architecture has many critical components. As part of your migration plan, we create a holistic reference architecture framework that addresses four major categories: infrastructure, functionality, integration and education.

This ensures the migration plan translates into execution — nothing is missed and there are no surprises. And, as our customers have validated, there's a reduced likelihood of change requests after implementation.

"With our prior system and processes, we couldn't see that nearly 10% of our inbound calls were subject to transfer. With GENESYS GLOUP, we have merged all outsourcers into the same queues, enabling us to prioritize the most valuable calls. This means our customers are CONNECTED FASTER to the next available agent across all of our outsourcers, helping to cut average waiting time in half. In addition, we have reduced the number of abandoned calls by a third while improving the overall experience."

Louis Lescoeur

Head of Workflow Management,

France B2C Customer Experience, ENGIE

# Routing — the heart of your customer experience infrastructure

Routing is foundational to engaging employees and delivering personalized omnichannel experiences. So, it's critical to get it right. While routing technology has advanced significantly in recent years, aging routing models still use only a limited number of attributes — typically collected during an interaction — to route customers to a fixed number of predefined agent groups.

Vector routing is one example of this approach. With it, interactions typically route to queues/skills that have assigned agents. This queue-based routing approach is inherently static, rigidly siloed and hard to manage over time. It also lacks the functionality to support end-to-end journey orchestration.

Not surprisingly, the most common challenges for call centers on older PBX or voice-based systems — never designed to support different channels on a single routing engine — can be traced back to basic queue-based routing issues. Queue/skill-based routing on legacy providers' systems use this approach. It typically requires agents to have hard skills or specific knowledge.

Genesys skill-based routing uses a combination of hard and soft skills. This approach offers more flexibility and reduces the amount of skill changes required, simplifying management and administration. As a best practice, skill changes should only happen when an agent has new knowledge — not to move work from the gueue to agents.

A single routing engine that offers smarter alternatives to queue/skill-based routing supports a holistic, orchestrated experience that spans the entire

customer journey. This could include one or more interactions across all channels — self-service and assisted-service. And a single routing engine extends omnichannel capabilities to your workforce engagement applications. This simplifies your quality management, recording and workforce management — and makes it more effective.

Imagine a single, robust routing engine that could:

- Deliver a consistent and effective customer experience by managing all your customer interactions.
- Apply skills, language, priority and agent utilization.
- Choose how skills are matched to your customer needs perfect match, partial match or no match at all. Or it could look for the perfect match and relax requirements over time to balance the cost of waiting.
- Blend inbound and outbound.
- Store and recall interactions within your CRM system.
- Give agents context a view into the complete customer journey
   as customers interact across multiple preferred channels.

You'll explore routing options like these as part of the discovery process, enabling you to eliminate the need for multiple systems and antiquated approaches. Instead, you'll get an integrated all-in-one omnichannel routing engine that gives customers, agents, supervisors and admins what they want — one experience across all channels — so they can get things done quickly. It's easier and far more cost effective than integrating and supporting multiple disparate solutions. Experience the power of one.

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**Step three** 

# MIGRATE WITH CONFIDENCE

# Proven, paced and predictable delivery

#### Stand on a future-proof foundation.

Successful migrations are deliberately paced. We consider all your unique business needs but focus on getting the basics right first. This reduces risks and disruption while giving you a solid foundation for the future. Think of it as a "walk, run, fly" approach.



#### Walk

Migrate your core contact center environment without loss of functionality.



#### Run

Enhance and optimize with digital channels, context-driven actions, performance metrics and employee engagement.



#### Fly

Differentiate with data and AI for predictive and personalized engagements.

#### Walk

The primary objective of the initial "walk" phase is to migrate your core contact center environment to a Genesys solution without losing any functionality.

You can expect to:

- · Migrate to an extensible, reliable platform.
- Leverage inherent attributes of the Genesys voice solution practically, including inbound routing, reporting, IVR, quality management, desktop and workforce management.
- · Address critical digital priorities based on digital strategy.
- Develop a holistic vision for customer experience and a more indepth strategic plan designed for the "run" and "fly" phases.

Once you've established a solid foundation with the core contact center migration, you can continue to move forward at your desired pace.

#### The agile advantage

An agile approach to implementation applies a series of predefined sprint cycles that deliver the baseline contact center service.

This approach offers multiple benefits, such as:

- · Reduced delivery risk and timelines
- · Earlier opportunities for your feedback
- Ability to better accommodate design changes
- Earlier identification of potential challenges



#### Run

In the "run" phase, you'll begin to enhance and optimize by building on the migration or "walk" phase. And you'll extend your customer reach by offering access in multiple channels and proactively reaching out to customers as events occur.

#### This might include:

- Building out digital channels with a mobile and/or online environment.
- Developing context-based next-best actions, such as IVR, web engagement, routing and proactive engagement.
- Defining holistic and trackable outcomes and performance metrics based on best practices (e.g., a balanced scorecard), with reporting and data visualization.
- Expanding employee engagement capabilities to include skills assessment, real-time training delivery and coaching tools.

"Genesys Cloud is a BEAUTIFUL AND RELIABLE TOOL that creates a positive experience for both our agents and our customers. There aren't too many instances where you can have a positive impact on every stakeholder in the process. With GENESYS CLOUP, we do."

Henry Svendblad CTO, Company Nurse

## Fly

The "fly" phase focuses on adding sophisticated technologies that drive differentiation. Here, you'll apply data and machine learning to optimize and personalize every engagement opportunity and rapidly improve response times.

These components might include:

- Speech and text analytics that shape customer dialogues, sales and marketing efforts, staff coaching, development, and assessments
- Journey analytics for customer engagement analysis
- Predictive routing
- · Predictive web engagement
- Automated self-service with bots
- Al-based WFM

#### Reporting continuity

We know you've invested in your current reporting solution. And we want to smooth the transition to Genesys. Within the "walk" phase of your migration, our prescriptive approach includes a technology bridge from your current reporting to Genesys reporting. Based on your unique requirements, we can select the best options to ensure continuity of reporting on your critical KPIs. You'll get a transition path to a new level of reporting and analytics from among these options:

- Predefined reports for each Genesys use case identified in your assessment workshop
- · A predefined set of the most common system-level reports
- · A business intelligence data feed to an existing data warehouse
- Full data transfer, storage and dashboards to see your data —
   historical and real time from Genesys and your current vendor<sup>1</sup>

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**Step four** 

# ACHIEVE YOUR DESIRED BUSINESS OUTCOMES

## It's a relationship, not a transaction

#### We're with you all the way.

Many of our customers see immediate and/or short-term benefits after migrating to Genesys Cloud.

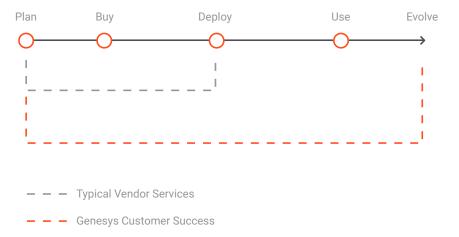
- Company Nurse enjoyed a 20% increase in call volume without adding agents and a \$50,000 annual savings due to reduced overflow calls.
- Lowell Norway realized impressive results in just three months: a 26% reduction in average handle time, more than 90% increase in FCR and a 20% boost in agent productivity.
- ATB Financial deployed in six months and, for the first time, could see its customers' entire journeys on any channel, providing truly effortless experiences.

These outcomes don't happen by accident; they require a deliberate and precise execution of talent.

With some vendors, it might feel as if your relationship ends once you sign the purchase order. That can leave you feeling abandoned and like you're left to figure out the rest of the journey on your own. You deserve better; your journey shouldn't end with the go-live party. Using customer feedback and provider interactions, we've developed an unmatched experience. It's called **Genesys Customer Success**.

#### **Genesys Customer Success**

The comprehensive engagement model designed to guide you through every phase of your customer experience journey.



## Know you're getting the value you expected

Genesys Customer Success ensures your first move lands on a stepping stone that will carry you to the next, and the next and the next — throughout our entire relationship.

While your immediate goals are important to us, our ultimate goal is to see you grow as a company. We want you to become a customer experience champion who can independently drive innovations and adapt to the changes ahead.

You're always learning and evolving — so are we. As trends emerge and landscapes shift, we'll continue to find new ways to move you forward. This will empower you to differentiate yourself from your competition and win the customer loyalty that makes you an iconic brand.

#### OUR FOCUS IS YOU

#### Clear goals

#### Success planning

- Agree on a success plan together
- Focus on your outcomes
- Track progress across milestones
- Manage during regular touchpoints
- Revisit annually, quarterly or another cadence

#### **Expert guidance**

#### **Customer Success Manager**

- Success planning
- Service, renewal and training recommendations
- Product update notifications
- Closed-loop Net Promoter
   Score (NPS) program
- Executive business reviews

#### Accelerated results

#### Outcome-driven services

- Ouick starts
- Dedicated engagements
- Training subscriptions
- Go-live assistance
- Testing and readiness
- API and integration services
- Partner services
- Self-service resources

## Genesys migration customer results

Here are some top observations from customers that have moved from a legacy contact center infrastructure to Genesys products.

#### Cloud

Access to a mature global cloud infrastructure and a network of cloud customers to collaborate with.

#### Omnichannel desktop

Complete customer journey and context means agents can keep customers happy.

#### Innovation

Access to new and advanced capabilities, including AI, digital, bots, predictive routing and journey analytics.

#### **Omnichannel routing**

Reduces the number of call flows and transfers for a better customer experience.

#### Single vendor

Operational gains from consolidation of disparate technologies.

#### Reliable reporting

Unified and holistic reporting across the contact center.

"This is the best contact center I could have imagined. We've been ranked the NUMBER ONE Vodafone contact center worldwide. And with the new INNOVATIVE CHANNELS we've developed, we know there's a lot more to come."

Jöra Knoot

Head of Contact Center and Telesales, Vodafone

## The proof is in the data

# The proven prescriptive migration approach



#### **Lowell Norway**

realized a 35% increase in identification on first contact and 90% or higher first call resolution.



Coca-Cola Business Services North America reduced TCO by 50%.



Ping An Insurance improved NPS by 73%



Vodafone saw 86% of customers routed to the best agent within seconds, irrespective of channel.



Yahoo! Japan reduced new business account setup from one month to one day.



Westpac New Zealand

consolidated 39 siloed contact centers to a single virtual contact center.



ATB Financial migrated an entire contact center infrastructure to Genesys Cloud in six months, replacing three legacy, on-premises systems.



Whirlpool Corporation improved average speed to answer and abandonment rates by 90% and decreased transfer rate by 50%.



Conte.it got 150 employees set up to work from home in just two days, then saw 5% improvement in response times. "We're thrilled with GENESYS
ENGAGE, our results to date,
and the company's vision
for product innovation,
security and stability.
With its immediate and
continuous delivery of
new functionality, we can
easily adopt technology
advancements like

#### ARTIFICIAL INTELLIGENCE

without expensive and time-intensive on-premises solution upgrades."

#### **Dwayne Calder**

Managing Director, Insights & Enablement, Client Care, ATB Financial

# Get your personalized demo

Take the next step in your customer experience strategy. Let's see what we can do together.

For more information, contact:



Black Box

https://www.blackbox.com

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855-324-9909



#### ABOUT GENESYS

Every year, Genesys® delivers more than 70 billion remarkable customer experiences for organizations in over 100 countries. Through the power of the cloud and AI, our technology connects every customer movement across marketing, sales and service on any channel, while also improving employee experiences. Genesys pioneered Experience as a Service<sup>™</sup> so organizations of any size can provide true personalization 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 contact center platform, designed for rapid innovation, scalability and flexibility.

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