GENESYS™

Conversation Manager Overview

Conversation Manager 8.5

1/2/2022

Table of Contents

Conversation Manager Overview

Welcome to the *Genesys Conversation Manager Overview*. This provides a basic overview of Conversation Manager and its components.

What is Conversation Manager

About Conversation Manger.

What is Conversation Manager?

What problems does CM solve?

What does CM deliver?

Components

Conversation Manager's architecture.

Architecture

Journeys

Journey Optimization and Mapping.

Journey Dashboard

Journey Timeline

Journey Mapping

Use Cases

Use Cases specific to Conversation Manager.

Use Cases

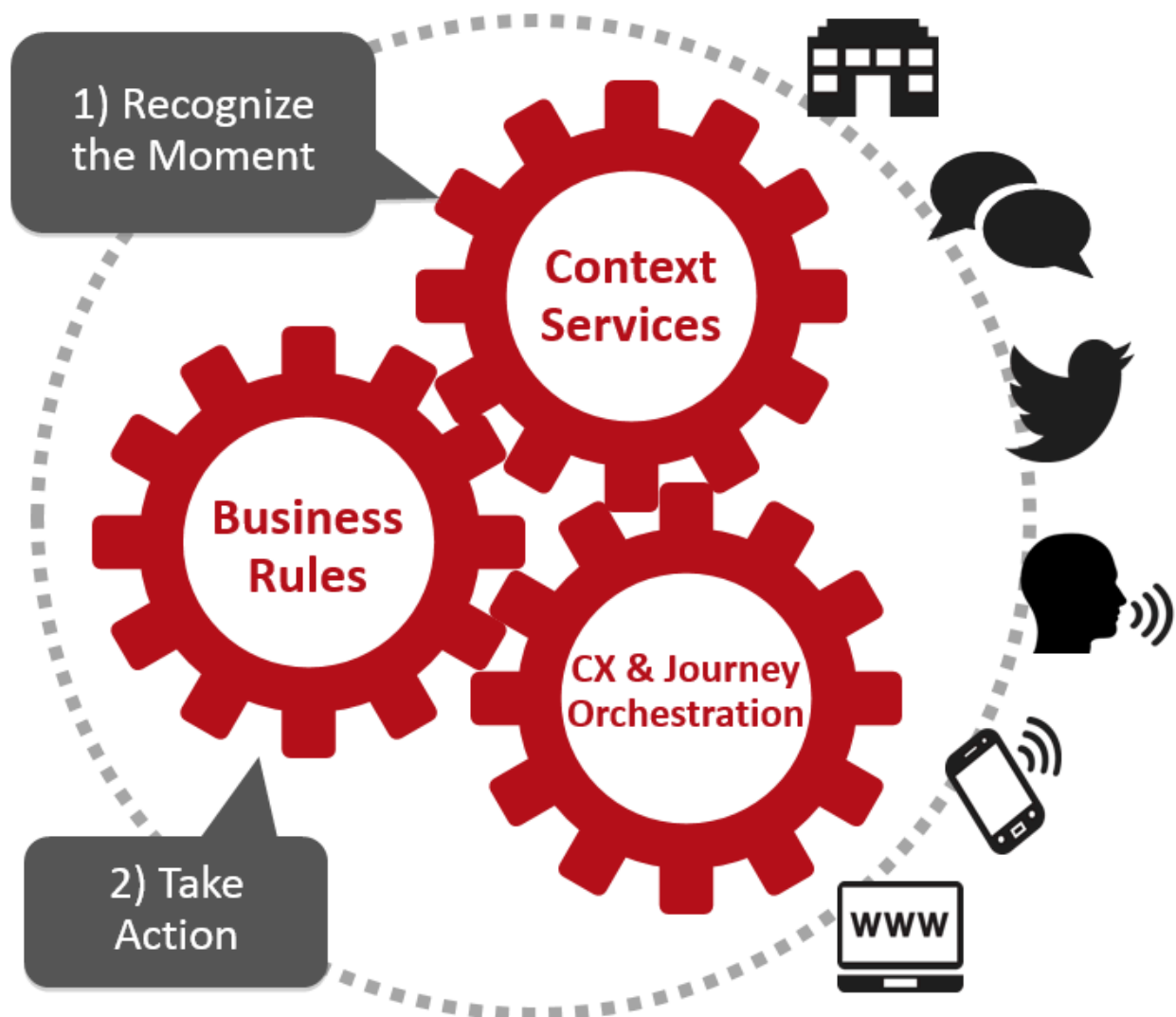# What is Conversation Manager?

What is a conversation?

To answer what Conversation Manager is, let's first define a conversation.
A conversation can consist of:

- Any number of Interactions
- Any number of Channels

- Any Length of Time
- Related by Context:
  - Service
  - State
  - Task
  - Extended Data (anything relevant to the Conversation)

What is Conversation Manager?

Conversation Manager is a contact center solution that creates coherent customer communication in real-time customer engagement applications that span one or more channels such as web, mobile,

chat, IVR and voice.

In a nutshell, Conversation Manager helps you recognize moments when you can take action to improve the customer experience. Within Conversation Manager, Context Services helps you to recognize the moment and the Business Rules help you to take action.

What does Conversation Manager Include?

Conversation Manager consists of a flexible context data store, a business rules system, and visualization dashboards.

Context Services

Contextual awareness refers to knowing who the customer is, what they want, and where they are in this process. Context Services also comes with a tool to manage Service, State and Tasks.

Genesys Rules

Rules allow simple if-then actions such as, "IF we know that the customer is a frequent user of our self-service tracking, THEN we offer self-service tracking as the first option in the menu."

Journey Timeline
The Journey Timeline is a visual timeline representation of the customer journey map, depicting all the touch points of the customer for various services on different channels.

Journey Dashboard
The Journey Dashboard is a visual representation of key performance indicators, showing rules execution and journey metrics.

Frequently Asked Questions

What are some of the common tasks Conversation Manager can perform?

- Observing preferences
- Cross-channel activity
- Dealing with possible unresolved issues or problem customers
- Campaign response
- Predictive personalization
- Recognizing moments to engage with customer

What problems does Conversation Manager solve?

How do you orchestrate customer engagement and manage your customer's experiences consistently across many channels? How do you manage customer engagement context to know when to take action? How do you know what action to take?

Genesys designed Conversation Manager to tackle these problems.

Example 1: Moment of Truth

There are a lot of breadcrumbs out there! Conversation Manager is only interested in Actionable Business Events and context that can be applied to the interaction (therefore, smaller breadcrumbs). Conversation Manager filters through all these actionable business events to identify the moment of truth.

An example of a moment of truth could be a simple Login Failure. In this case, none of the other events really impact the customer experience. So, if the customer chooses to call, tweet, or connect via chat, the CX Platform is aware of the actionable event and this enables us to prompt the customer with statements in the IVR such as "Is this what you're calling about?"
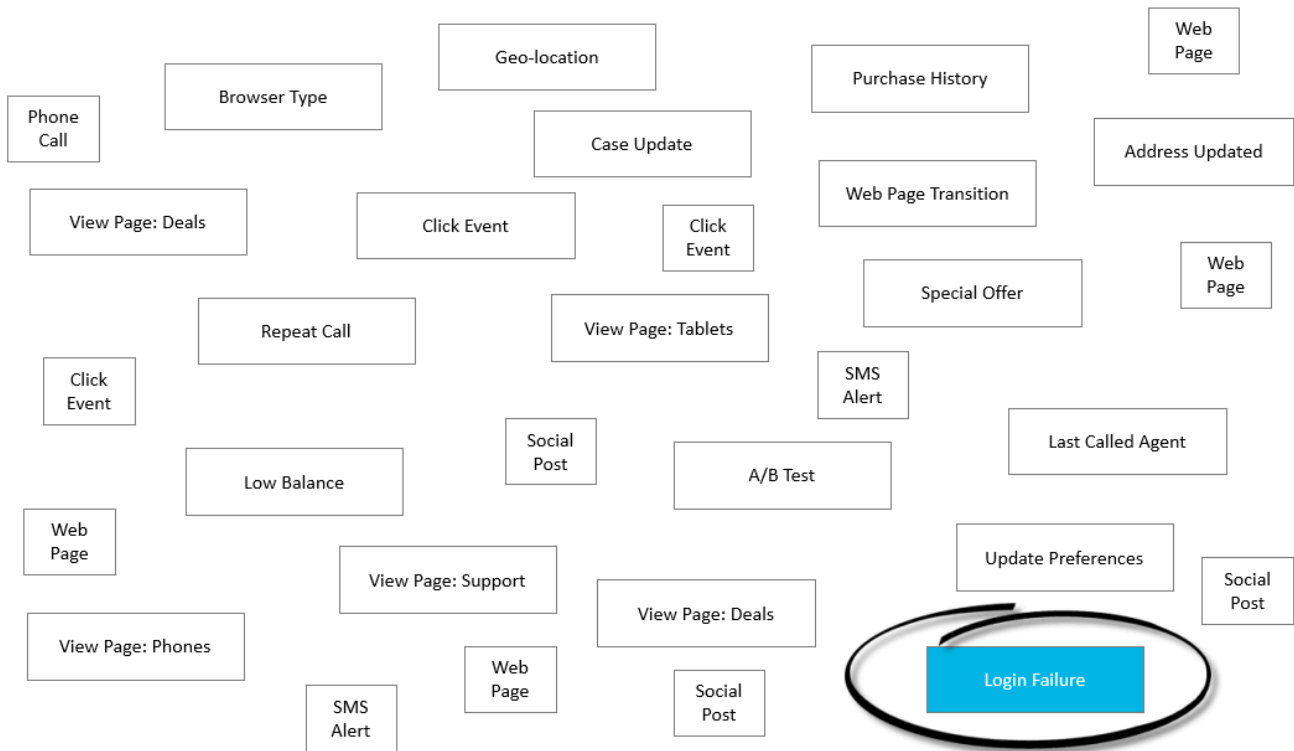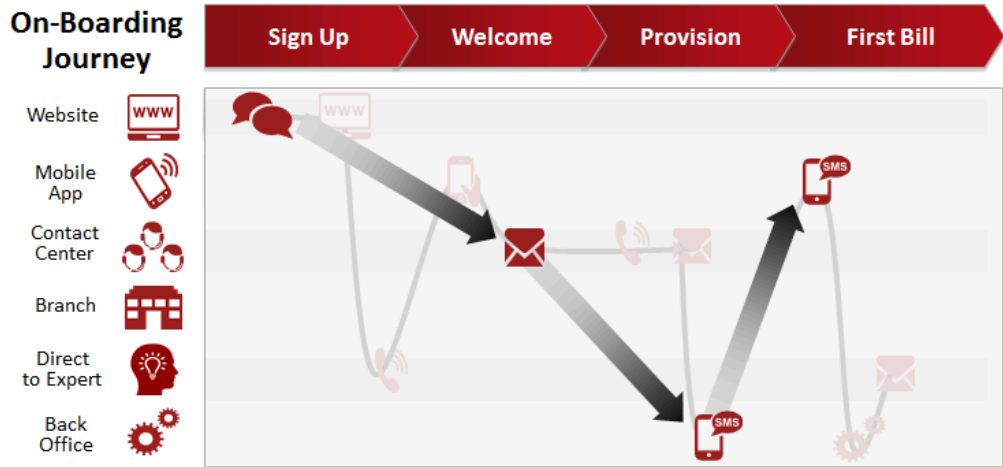
Example 2: Optimized On-Boarding Journey

Customer interactions are not isolated events, but related actions taken by the customer during multi-event, multi-channel journeys. With Conversation Manager, contact centers can identify customer journeys and optimize them for best results.

In the following diagrams, we see the difference between a typical customer on-boarding journey and one optimized by Conversation Manager. In this example, proactive notifications reduce the number of interactions and customer effort.

A Typical Customer Journey
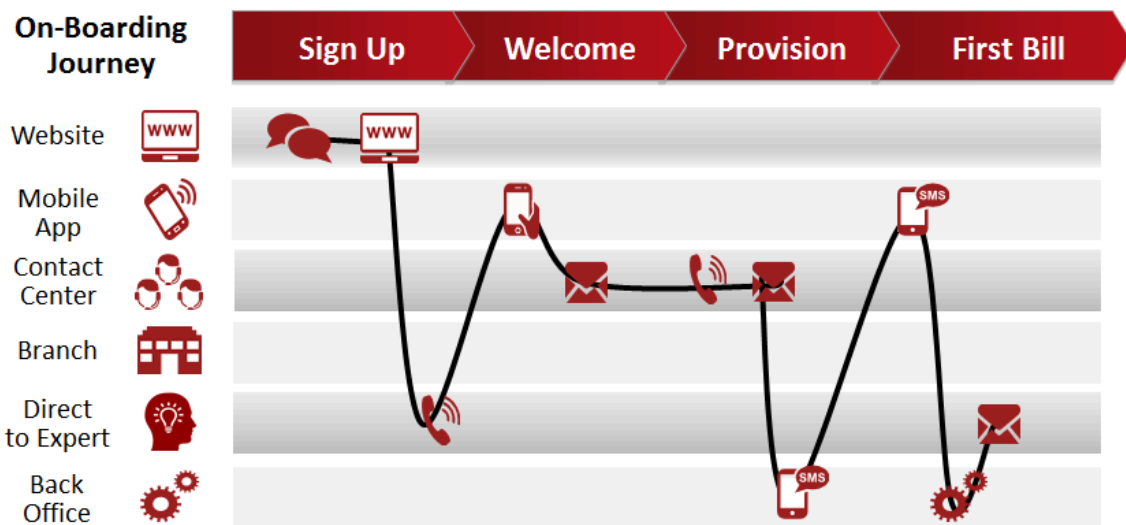
Optimal Customer Journey Re-Design

What does Conversation Manager deliver?

Conversation Manager delivers:

- Customer context across time and across channels
- A consistent experience across all channels
- Ability to create and manage customer experience rules
- Ability to track and share a single view of the customer

Key Differentiators

- Ability to not only capture and share context, but to *take action* using business rules
- Increased ability to cross-sell/up-sell products and services
- Gain more control over customer interactions, insuring an improved customer experience
- Better ability to control costs based on customer value

Architecture

Overview

At a high level, the web user events (Login, Login Failure, etc.) are all captured in real-time by web engagement. Orchestration (ORS) executes the business logic across all media types, and then Conversation Manager extracts context and rules of the business logic as well as provides an ability to report on events.
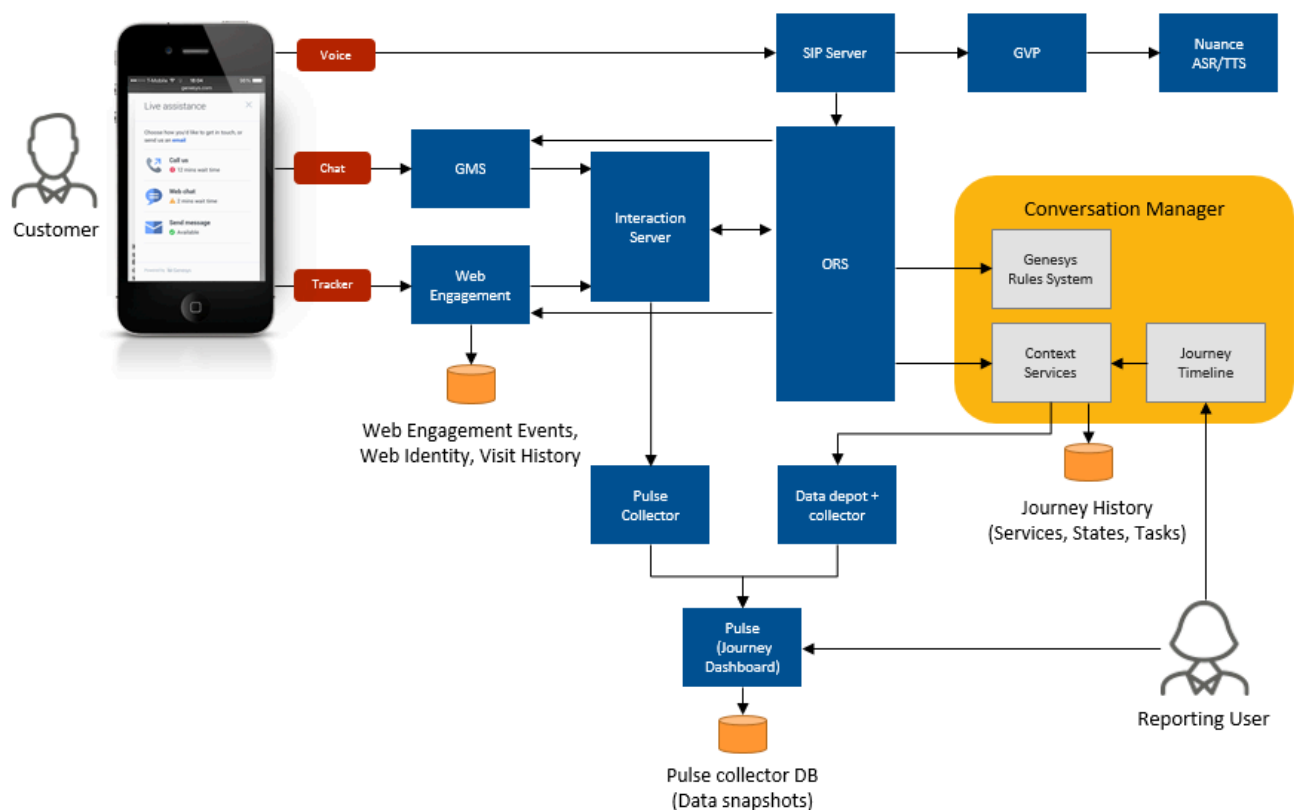
Components

Conversation Manager consists of the following components:

- **Context Services**—provides contextual awareness of interactions. Know who the customer is, what they want, and where they are in this process. Context Services also comes with a tool to manage

Service, State and Tasks. For more details on Context Services, please see the Context Services page.

- **Genesys Rules System**—enables If-Then actions such as, "If we KNOW that the customer is a frequent user of our self-service tracking, THEN we offer self-service tracking as the first option in the menu". For more details on Genesys Rules System, please see the Genesys Rules System page.

- **Journey Dashboard**—a visual representation of key performance indicators, rule executions, and journey metrics. For more details on Journey Dashboard, please see the Journey Dashboard page.

- **Journey Timeline**—a visual representation of the customer journey map. It depicts all the touch points of the customer for various services on different channels. For more details on Journey Timeline, please see the Journey Timeline page.

Runtime

Context services enables Genesys and 3rd party applications to access Conversation Manager services:
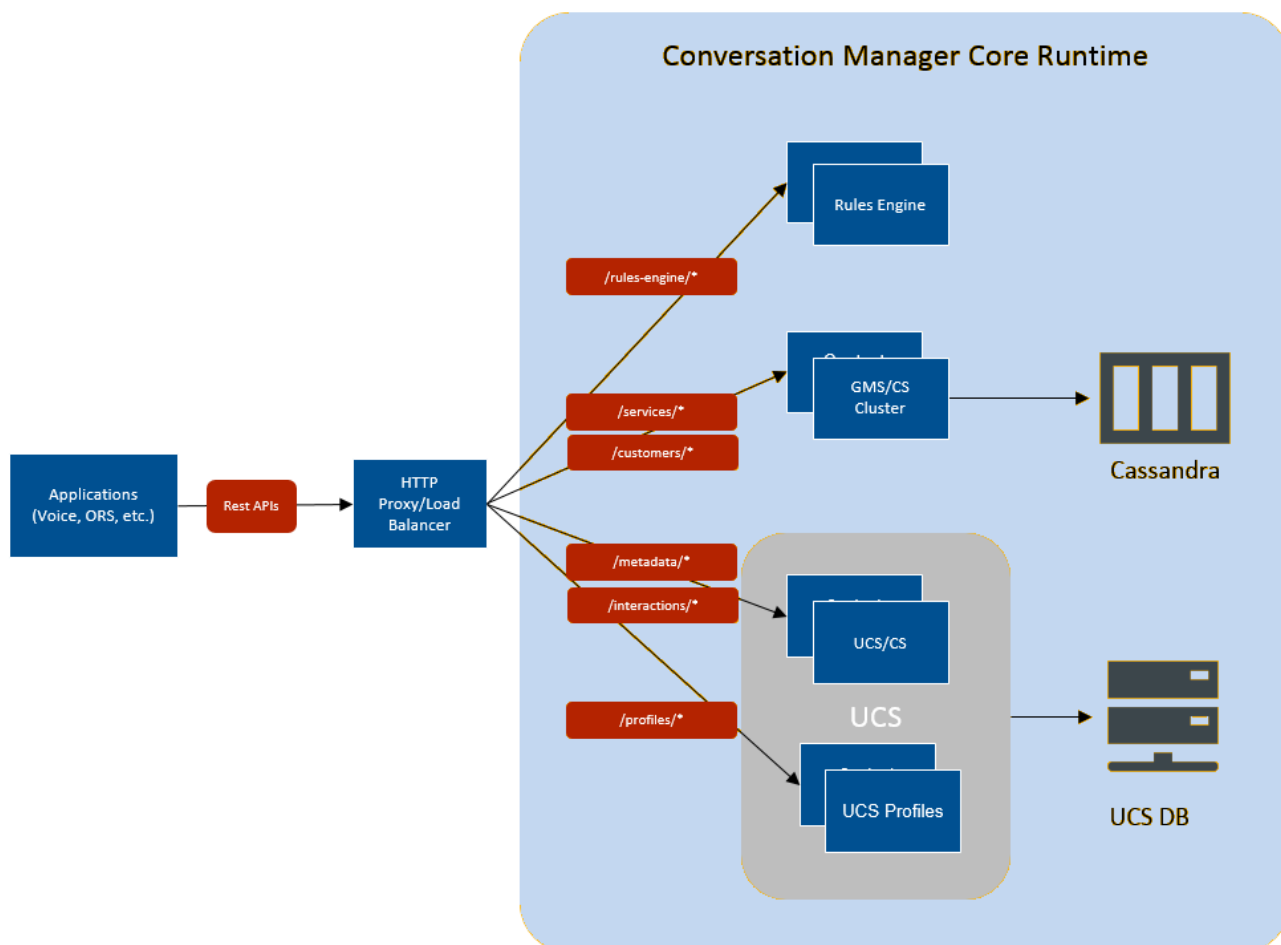
High Level Architecture
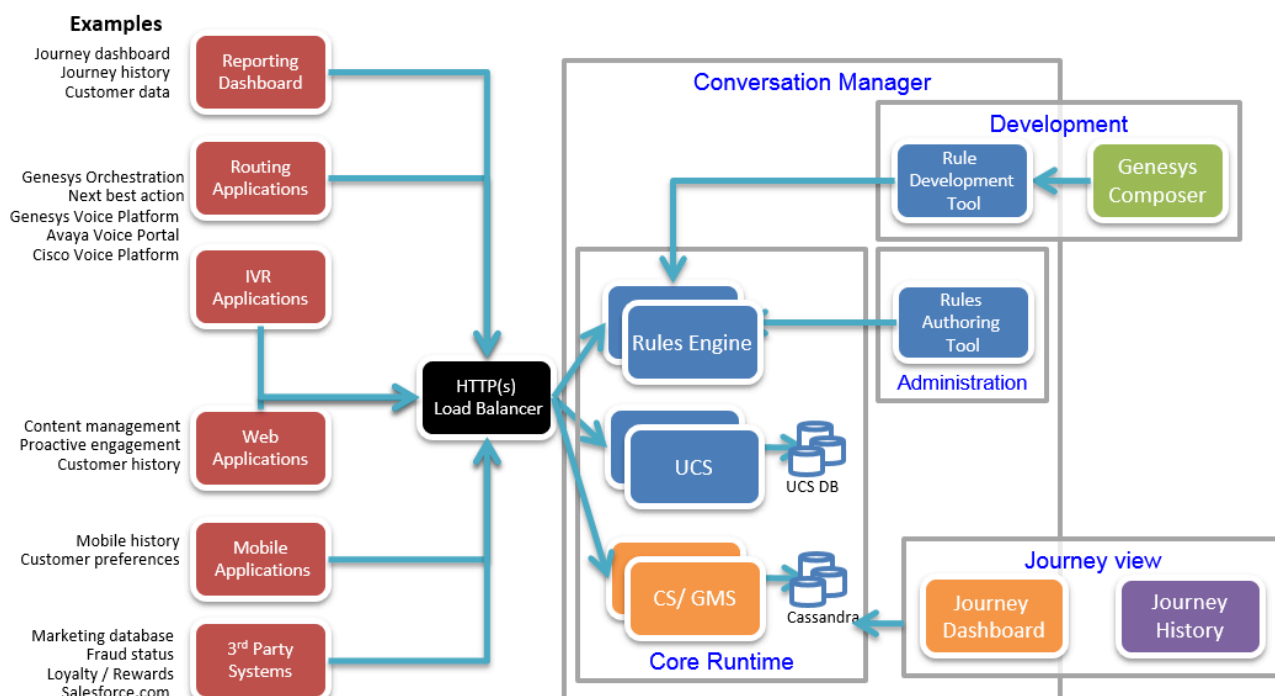
Important

Previously Universal Contact Server (UCS) managed and stored all the Context Services' resources and requests. Currently the data is split between Genesys Mobile Services and Universal Contact Server to fulfill Genesys models. For more information on this, please see Context Services Developer's Guide.

Tip

If you install a Load Balancer for UCS and GMS applications, you must set up redirections. For more information on this, please see Setting the Proxy for UCS Profiles

Services

Conversation Manager adds to Genesys the concept of service, which may be defined as follows:

- It represents a business process, which in turn may be seen as a communication or series of communications between a customer and an enterprise, and possibly also between various parts of the enterprise.

- It can span multiple interactions.

- It may include interactions in various media.

- It has a temporal beginning and end.

- It may be subdivided into states, which in turn may be subdivided into tasks (see also services, states, and tasks in the Developer's Guide).

> ### Important
> This term *state* does not have the same meaning as "SCXML state."

Orchestration Server

Orchestration Server has a function in Conversation Manager similar to the function of Universal Routing Server (URS) in Genesys voice and multimedia solutions. One of the main differences is that it operates based on business processes developed in State Chart XML (SCXML) rather than routing strategies written in IRL (Intelligent Routing Language, a Genesys proprietary language).

SCXML applications

SCXML applications can be written directly using any XML or plain text editor, or with Genesys Composer, an Eclipse-based development environment. They are published on an application server such as JBoss or another Java-based application server, and are executed on Orchestration Server.

Genesys Composer

Composer also provides a set of function blocks that allow access to Context Services. These out-of-the box function blocks on the workflow diagram palette allow the developer to create applications that perform various actions, such as:

- Identify customers and update their profiles.

- Extend customer profiles with user-defined information.

- Query a customer's profile.

- Create, start, complete, and query customer services.

- Query customers' active services.

- Enter, complete, and query service states.

UCS in eServices and Conversation

UCS in eServices (Multimedia)

Genesys eServices (called Multimedia before release 8.0.1) is a cover term for Genesys components that work together to manage interactions whose media is something other than traditional telephonic voice (for example, e-mail or chat). eServices includes some parts of the Genesys Customer Interaction Management (CIM) Platform, plus certain of the media channels that run on top of the Platform. UCS's function in eServices is to store and manage the following:

- Contact data

- Interaction data

  - The body of an interaction (plus associated metadata and user data) while it is being processed

  - The history of an interaction, including its place (if any) in a thread.

- Knowledge Management data: category systems, screening rules, standard responses, training objects, and models (training objects and models are available only with the Content Analyzer option).

In the context of eServices, clients communicate with UCS using RMI (Remote Method Invocation) and ESP (External Service Protocol, a Genesys protocol). For more details see the Preface and the "Overview" chapter in the *eServices 8.0 Deployment Guide.*

UCS in Conversation Manager

Central to Conversation Manager is the ability to maintain a unified view of the customer. Conversation Manager can use this knowledge in areas such as service personalization, enablement of service continuity, and in upsell/cross-sell campaigns. Context Services is the name of a group of additional capabilities that UCS provides. These capabilities can be invoked by any client, but most prominently by the components of the Conversation Manager solution. The Context Services functioning of UCS differs from its functioning in eServices in the following ways:

- In addition to interaction data and contact data (called customer data in the Context Services context), UCS/CS stores data on services. Services are the basic units in a model for business context used in customer service applications. See also services, states, and tasks in the Developer's Guide.

- Clients communicate with UCS using RESTful (HTTP) web services, not RMI or ESP.

- Context Services uses a different procedure for contact identification and creation.

- Context Services organizes data on contacts differently. See also profiles and identification in the Developer's Guide.

Journey Dashboard

The Journey Dashboard is a visual representation of key performance indicators, showing rules execution and journey metrics. It can display things like customer history and data, as well as repeat contact activity across channels with trending for optimization. For information on how to customize the Journey Dashboard, please see Customize Journey Dashboard for Pulse.
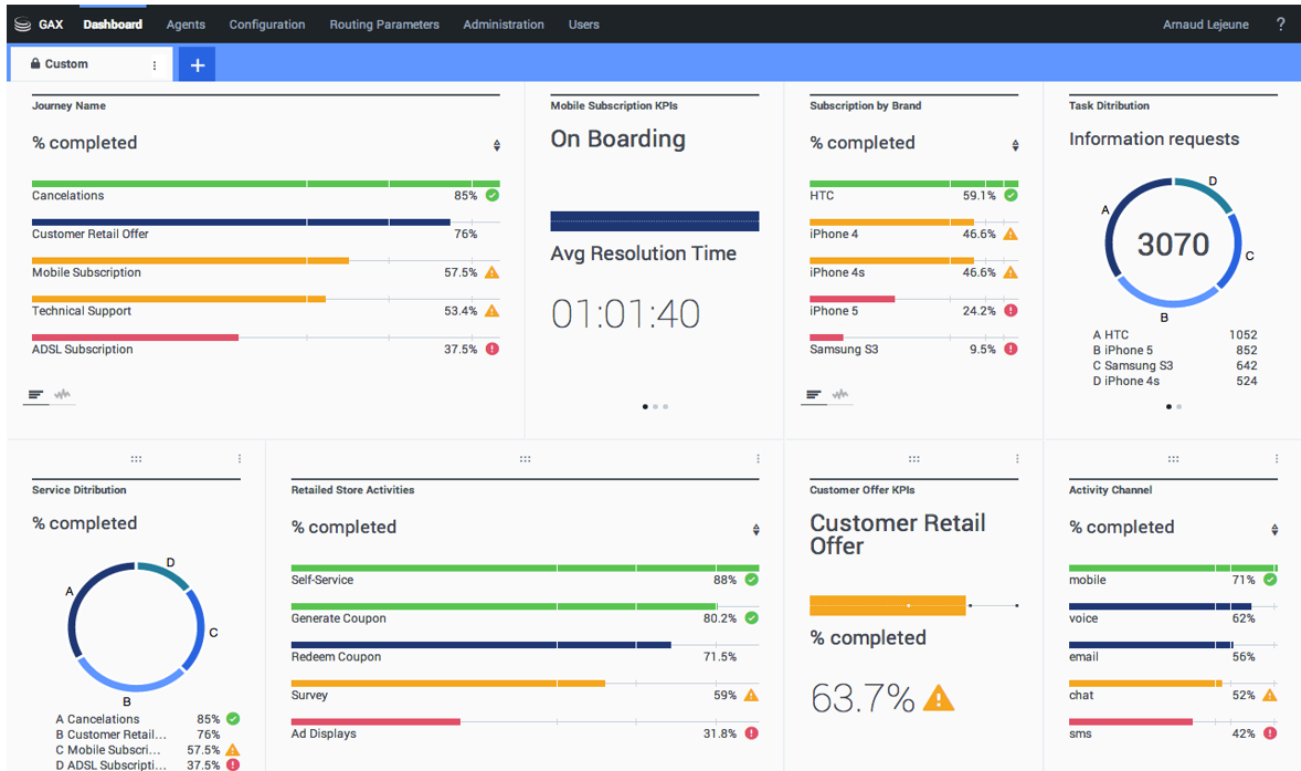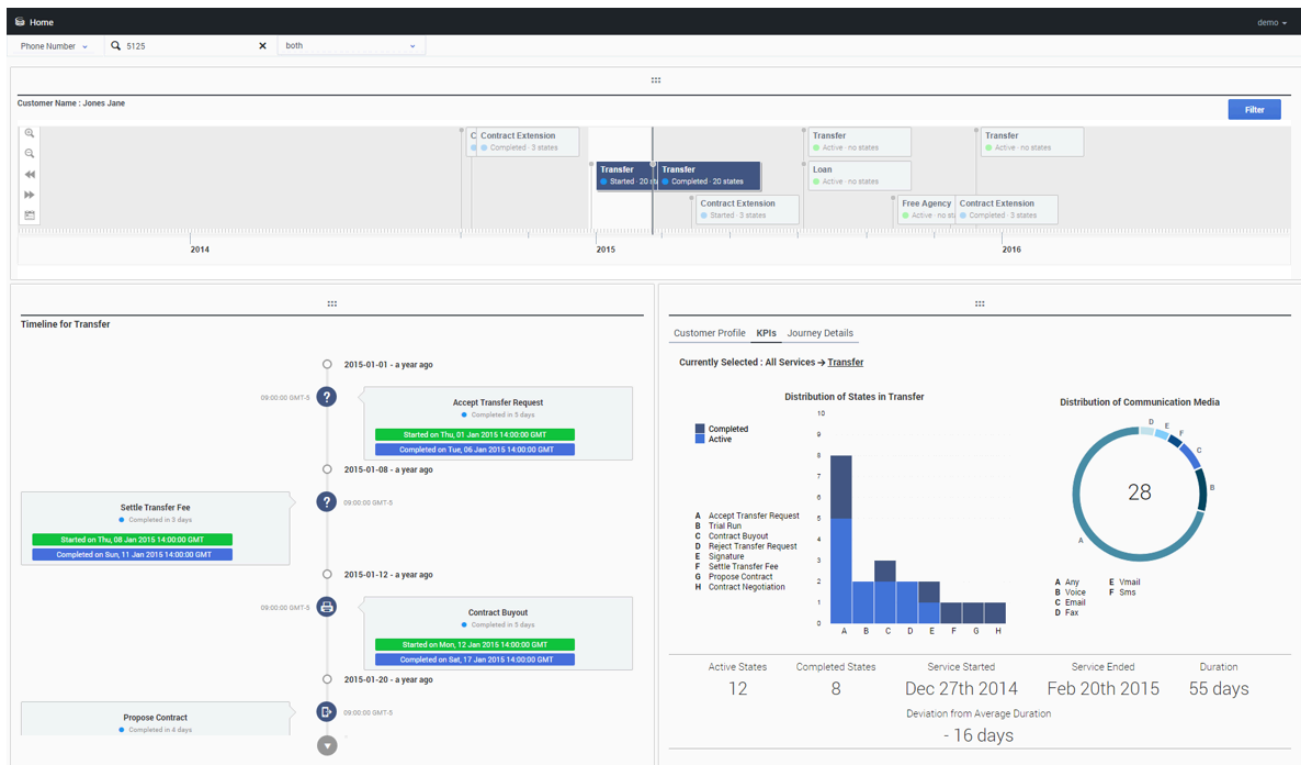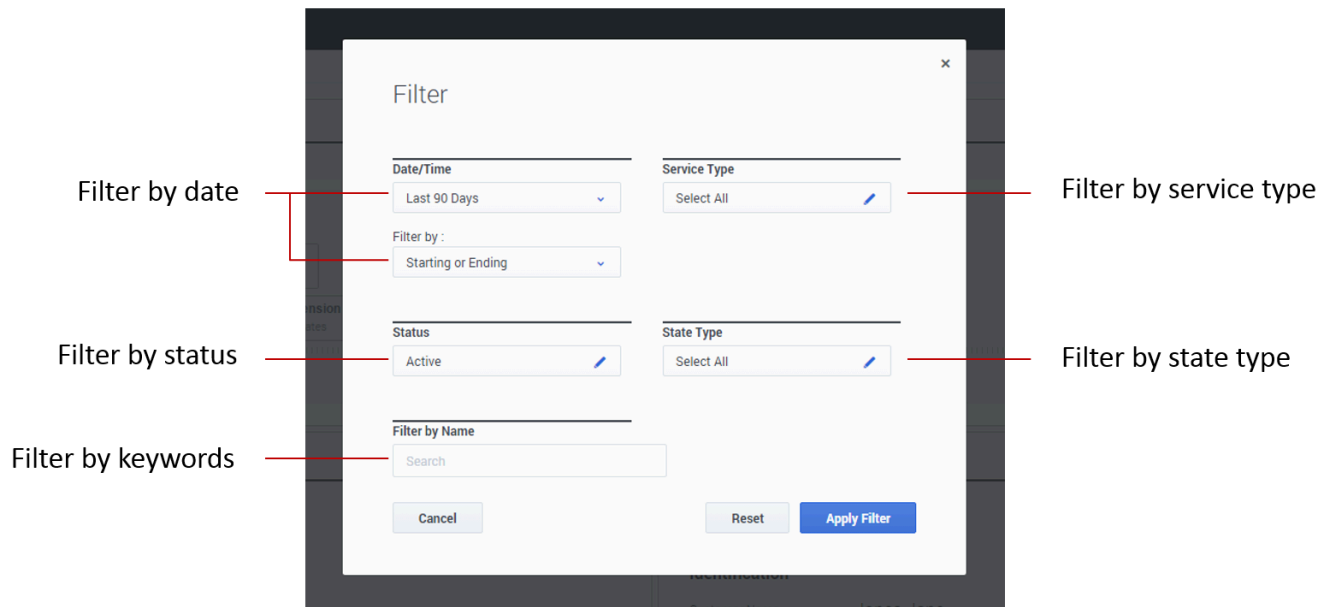
Journey Timeline

The Journey Timeline is a visual timeline representation of the Customer Journey map, depicting all the touch points of the customer for various services on different channels.

Some of the Timeline's key features include:

- Filtering
- Customer Profile
- KPIs and Journey Metrics
- Journey Data

Filtering

There are a number of filtering options available with Conversation Manager. You can filter by:

- date
- status
- keywords
- service type
- state type

Customer Profile

Customer Profile displays basic information about the customer. This feature is optional and can be switched off. You can also create custom profile data and can edit the visible data from your configuration settings.
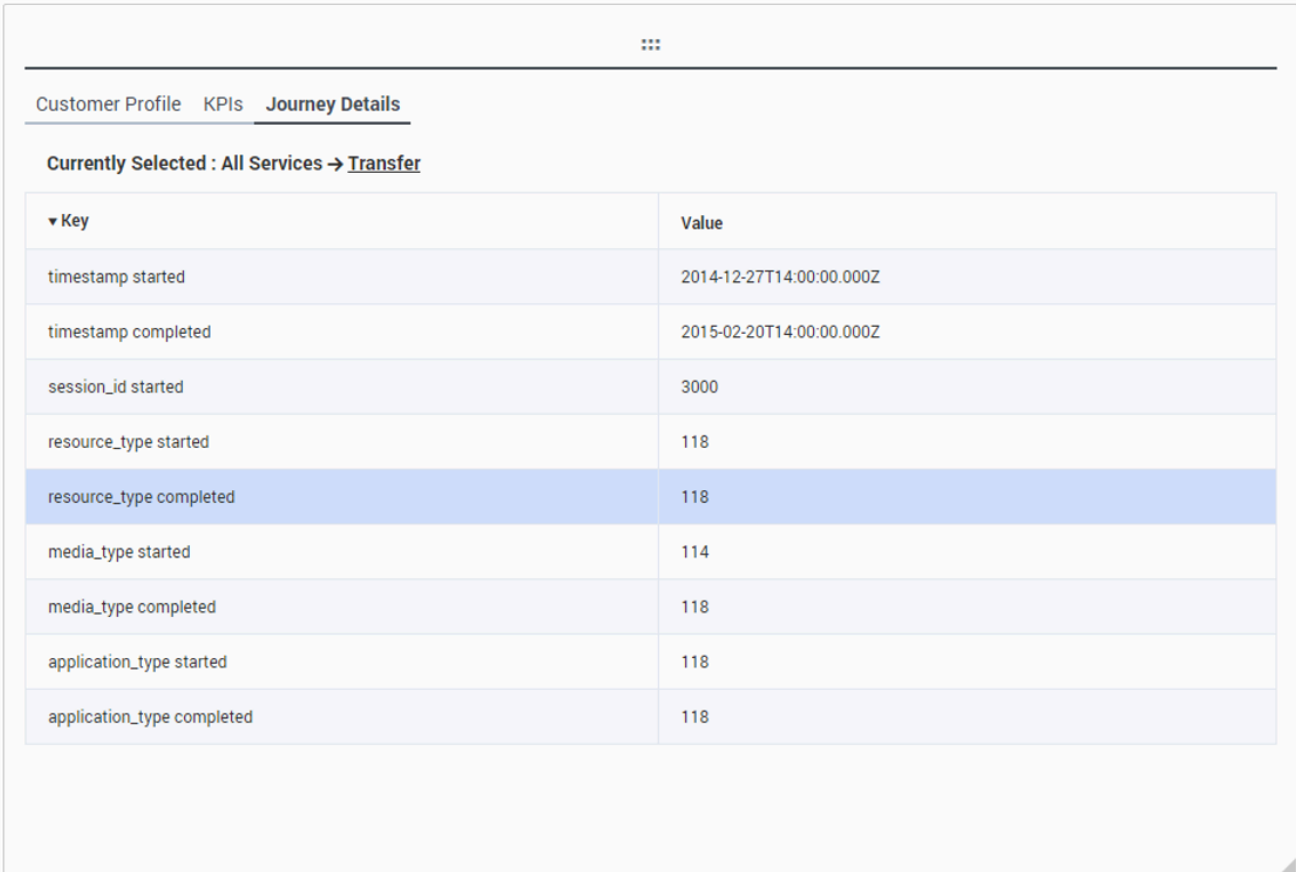
KPIs and Journey Metrics
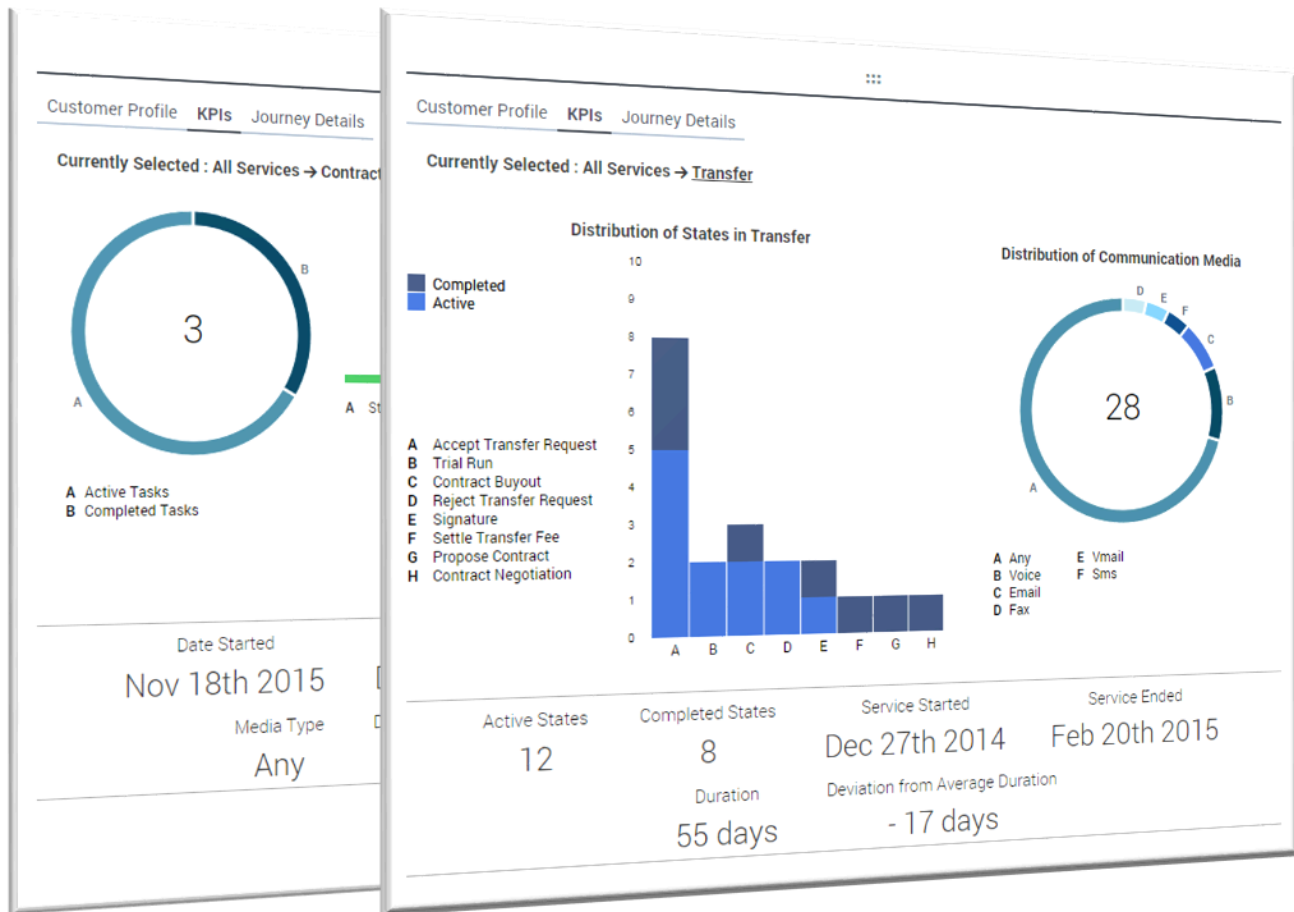
With Conversation Manager, you can view KPIs for:

- All Journeys (services)
- Selected journey
- All States (within a Journey)
- Selected states

Other useful features include:

- Data Visualizations
- Alerts based on thresholds
- Configurable KPIs
- Navigation Trail to switch between all states and selected states

Journey Data

With Conversation Manager, you can push data with:

- Journeys (Services)
- States (within a Journey)

All this data is sortable and includes a navigation trail to switch between all states and selected states.

Helpful Links

Topic	Link
Using the Journey Timeline	Journey Timeline Interface
Customizing the Customer Journey	Customizing Journey Timeline
Journey Timeline Plugin for WDE (including source and binary downloads, and installing and running	Journey Timeline Plugin for Workspace Desktop Edition

Topic	Link
the sample)	

Journey Mapping

Use the following topics to learn about Journey Mapping and Optimization. See the summary of chapters below.

- Journey Mapping Requirements: Use this information to help you gather customer requirements.

- Journey Mapping Use Case: Use this example to help you map a customer journey.

Journey Mapping: Gathering Requirements

Before you begin optimizing a customer journey, you must understand your business objectives:

- Ask for pain points and opportunities

- Walk through Website or IVR flows and put yourself in your end user's shoes

- Understand the relevant gaps and opportunities to streamline and think about how you can leverage Conversation Manager

- Think about how journeys can be optimized

The following questions will help you understand your business objectives:

Journey

- What is the customer journey today?

- What do you *want* the journey to be *tomorrow*?

- How long do you want Context stored and relevant?

- What constitutes journey success or failure?

Channels

- What channels are you using?

- What data do you need to collect from each Channel?

Personalization and Customer Experience (CX)

- What do you want to achieve in terms of CX and business objectives?

Results and Measurement

- What are the Rules needed to achieve results?

- How do you want to measure Journey Milestones and display them in the Journey Dashboard?

Journey Mapping Use Case: Moving Your Cable Service to a New Home

Consider the following example, your customer is moving to a new home:

1. The customer calls their ISP or goes on the web to initiate a move request.

2. An agent starts a case and sets the tasks required to complete the move. The agent sends a confirmation email to the customer.

3. The agent checks in on the status and periodically updates the customer about progress.

4. Before the move, the agent calls the customer.

5. MOVE DATE: A field rep sends a notification to the customer about arrival time and confirms the address.

6. MOVE COMPLETED: The agent completes the move process with a courtesy call.

Mapping a Journey to Services, States, and Tasks

From the example customer journey, you can create the following services, states, and tasks:
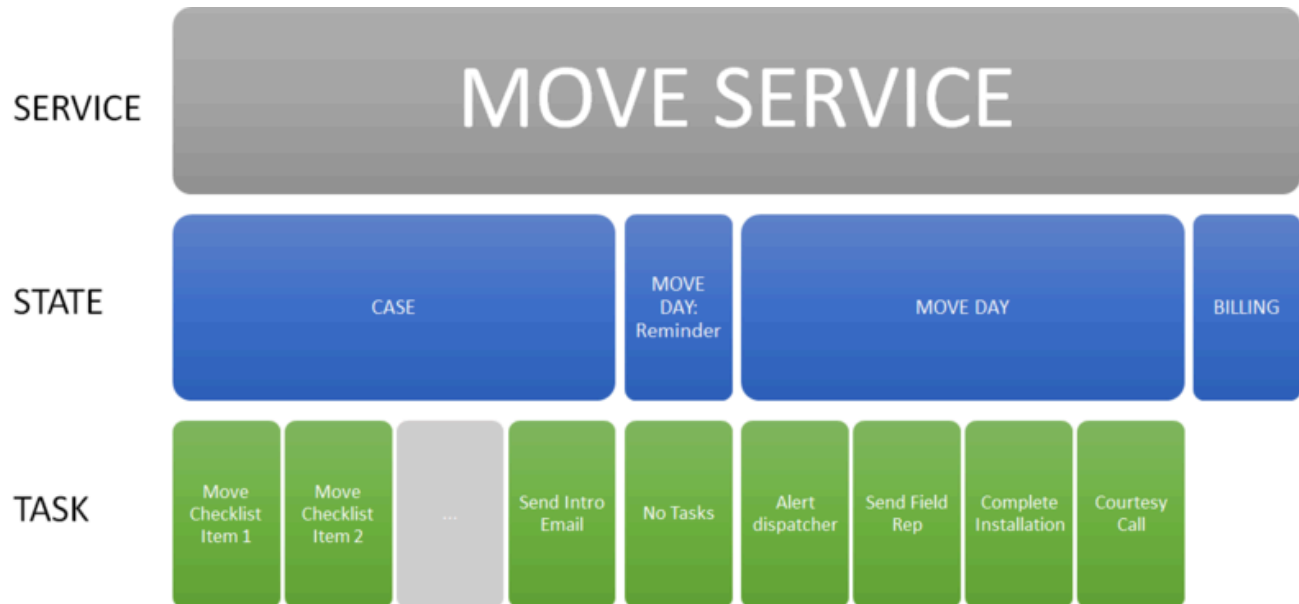
Journey Optimzation

You can further optimize this journey by implementing the following:

- **Service Resumption**
  Customer logs into the web. Lookup open journeys and Offer a Chat with a personalized message "Would you like to know the status of your recent move request?".

- **Observed Preferences**
  Customer chose Spanish as their preferred language. When he or she calls, greet in Spanish.

- **Predictive Action**
  Customer calls the Customer Service phone number. It is Move Day. When the customer calls, greet them with "Are you calling to find the time of arrival of Field Rep?".

- **Data Enrichment**
  Prior to sending communication, personalize the email message by leveraging data from Context Services.

Use Cases

This page lists a few of the use cases for Conversation Manager.

Observed Preferences
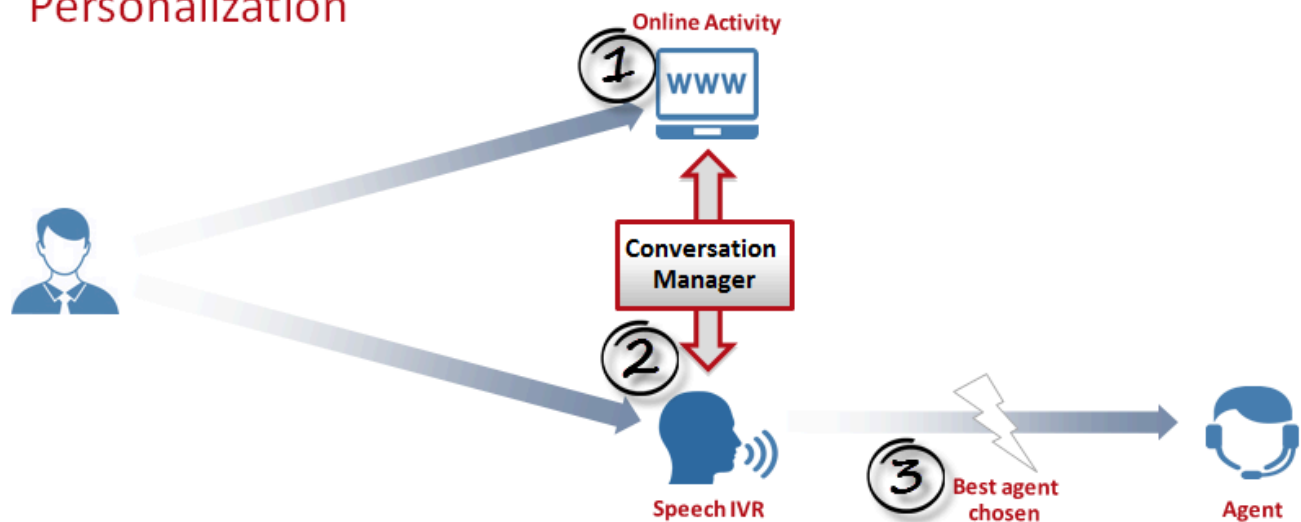
1. A customer navigates the web site and chooses to use Spanish as their default language.

2. The next time the customer calls the company the IVR menu is personalized. The customer preference to use Spanish can be used to default the language to reduce customer effort.

3. If an agent interaction is required then the IVR can look ahead to see the estimated wait time for someone able to speak Spanish with the appropriate skill.

Cross-Channel
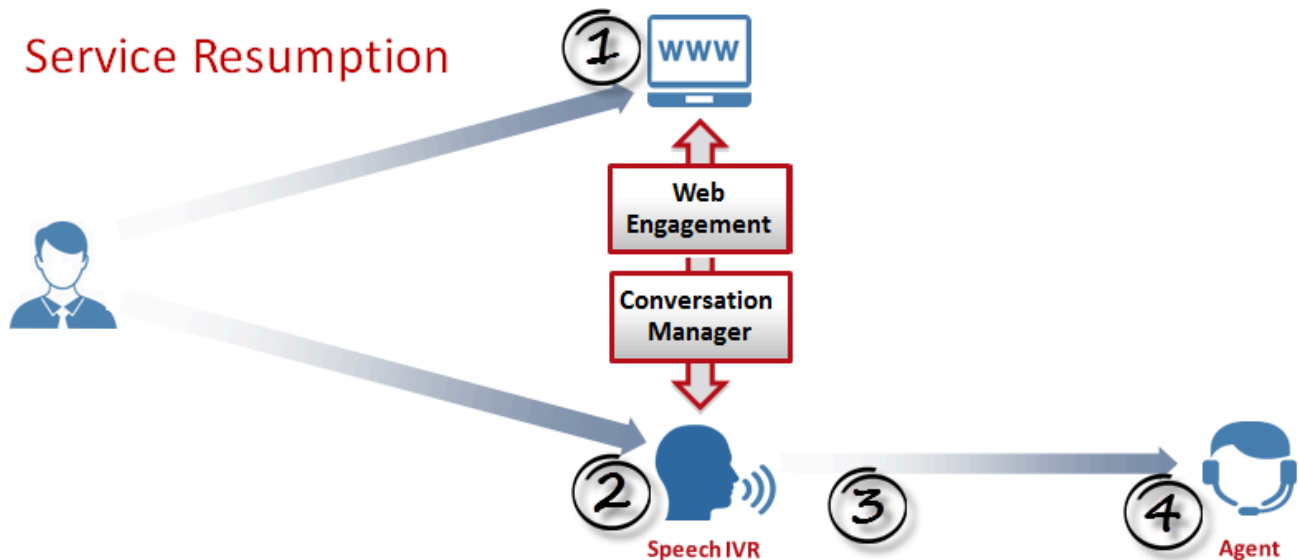
1. Customer is online and is part way through an order when he abandons and calls into the contact center. Genesys Web Engagement observes the behavior and stores context in Conversation Manager.

2. As Conversation Manager retains the context from the online session, the IVR application is aware of the customer activity and changes the prompting experience to match.

3. Customer is invited to connect to an agent in real time.

4. Agent is provided full context of the customer's activity online and the customer is able to continue where they left off.

Frequent Contact Interceptor
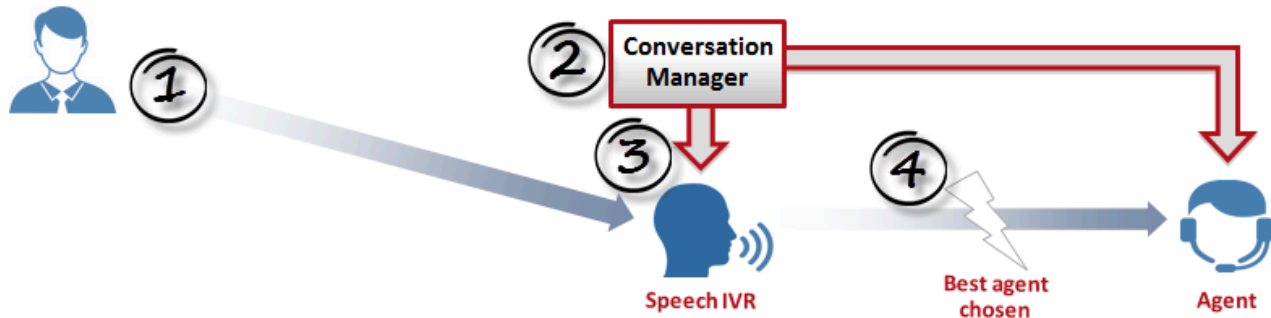
1. A customer is calling the contact center multiple times in a predefined threshold.

2. Genesys checks Journey information in Conversation Manager for contact history.

3. Conversation Manager identifies repeat contacts, customer intent and probable cause.

4. A contact interceptor is offered to bypass IVR menus and route the caller based on business rules for high first contact resolution, fraud management or self-service deflection.

5. Agent screen pop shows caller history and explanation for the classification.

6. Journey Dashboard shows repeat contact activity across channels with trending for optimization.

Campaign Response
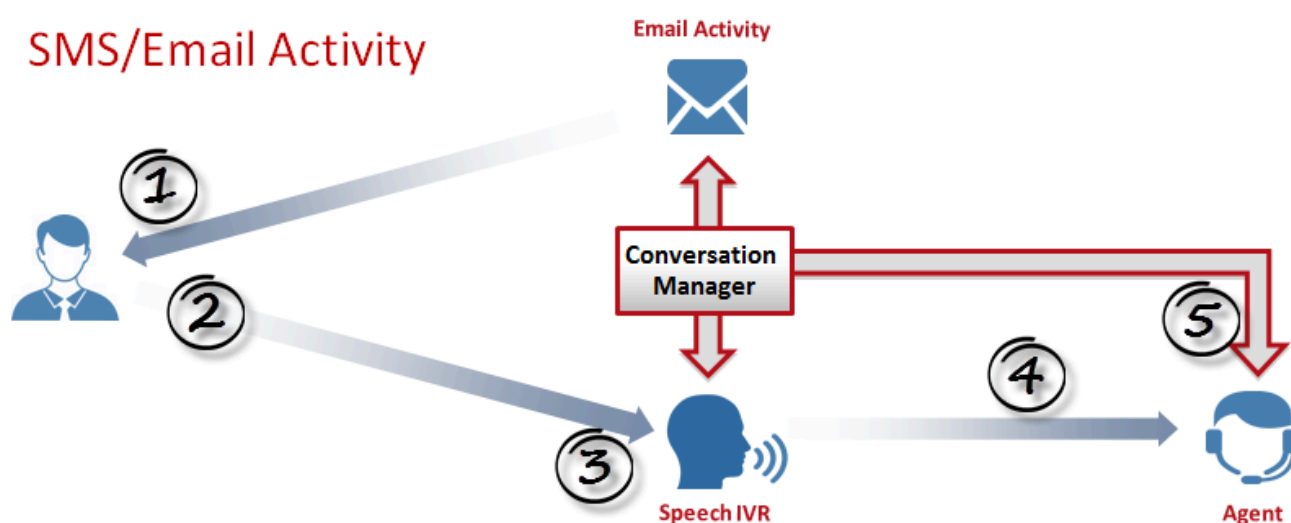
1. Customer has been sent an SMS or Email regarding a new offer from the company.

2. Customer picks up the phone and calls the company.

3. IVR application is aware of the outbound SMS activity and is able to infer customer intent.

4. The right agent is selected that can handle the customer interaction.

5. Agents see the screen pop showing the entire customer history.

Predictive Personalization

1. Customer is browsing the company web site.

2. Using context from the customer profile or previous interaction history we can dynamically change the web site content to personalize the web experience.

Examples

- Offer suggested products, special offers or coupons in real-time

- Enable (or disable) contact channels (e.g. Priority service, contact number)

- Schedule changes to web context based on rules

Recognizing Moments
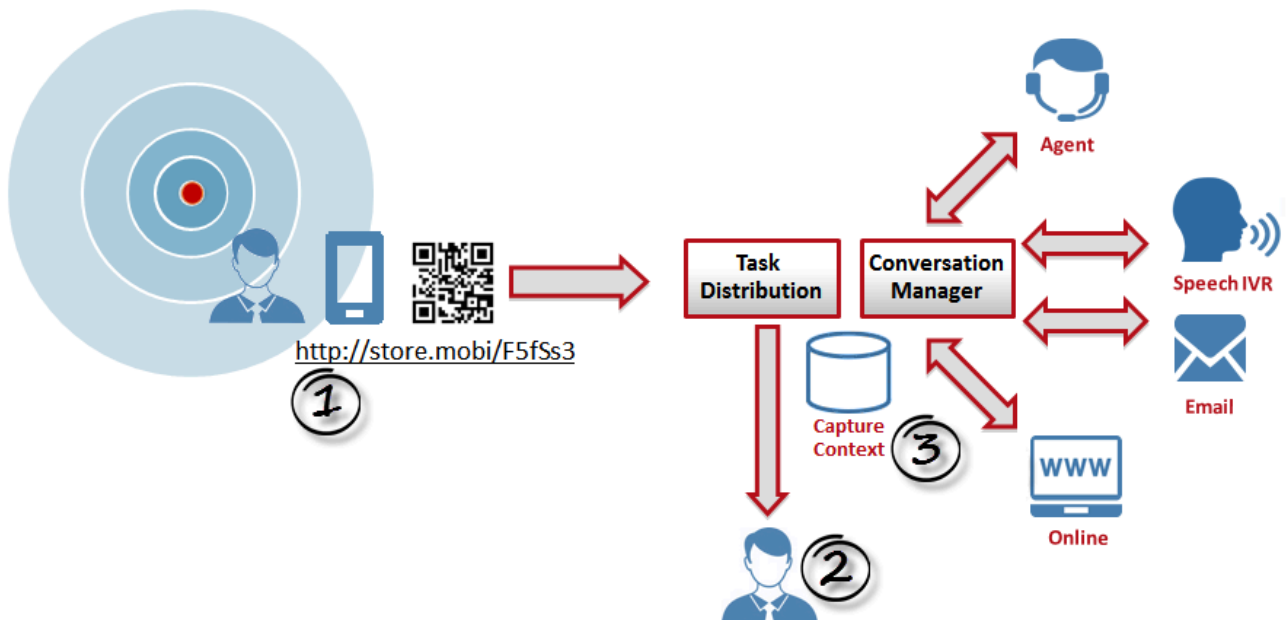
1. Customer is browsing items in-store and scans QR code, or a Beacon recognizes the customer is in

proximity.

2. Store associate is alerted in real time about a potential sale and is shown suggestions about what he should talk about.

3. Context is captured for use in another channel in the future.