

GENESYS[®]

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Deployment Guide

Pacing

Pacing

About Pacing

Many products allow you to focus on *reactive* engagement sessions, in which a customer initiates the connection with your contact center by responding to a *static* request, such as a **Chat Now** button. Genesys Web Engagement goes a step further, by predicting when it's a good time for your contact center to take the initiative—to reach out to a customer proactively. For example, Genesys Web Engagement might see that a customer is likely to abandon a purchase, so it proactively sends them a pop-up that says "Let's chat!" At that point, the customer can click an **Accept** button and your agents have an opportunity to help them complete their purchase.

Most of the information that Genesys Web Engagement works with is focused on your customers. This data helps you pinpoint the ones who are most likely to respond well to a proactive invitation.

This works great when you have enough agents:



Available Agents

But what if a customer accepts an engagement offer—and your agents are too busy to answer?



That's what pacing is for. A *pacing algorithm* helps you manage your agent load by comparing it to your traffic and predicting how many proactive invitations you can send out—without making your customers wait too long for a response from your agents.

For more information

- For a more in-depth look at the pacing algorithm and the usage methodology behind it, click HERE to download the "Pacing Algorithm Usage Methodology" Word document. See download tips
- If you want to combine proactive (outbound) and reactive (inbound) traffic, find out more about how Web Engagement handles dual pacing.
- You can also customize the way the pacing algorithm is used in the Engagement Logic Strategy. For details, see Accessing Pacing Information from the Engagement Logic Strategy.

To enable the pacing algorithm, complete the procedures below.

Configuring your optimization model

Note: Starting with version 8.5.000.33, Web Engagement allows you to use Agent Group objects as the primary way to configure pacing settings. You can still configure these settings in the Web Engagement Cluster or Web Engagement Server application objects—as shown in this section and the following section—but settings configured in the Agent Group objects have a higher priority.

Complete this procedure to enable the pacing algorithm to predict traffic for your Web Engagement solution.

Start

- 1. Open Genesys Administrator and navigate to **Provisioning > Environment > Applications**.
- 2. Edit the Web Engagement Cluster application and click the **Options** tab.
- 3. In the [pacing] section, set the algorithm option. The supported values are:
 - SUPER_PROGRESSIVE Recommended for small agent groups (1-30 agents); only proactive traffic is
 predicted.
 - SUPER_PROGRESSIVE_DUAL Recommended for small agent groups (1-30 agents); both proactive and reactive traffic are predicted.
 - PREDICTIVE_B Recommended for bigger agent groups (start from 30 agents); only proactive traffic is predicted
 - PREDICTIVE_B_DUAL Recommended for bigger agent groups (start from 30 agents); both proactive and reactive traffic are predicted.
- 4. Set the optimizationTarget option. The supported values are:
 - ABANDONMENT_RATE Percentage of interactions that will be abandoned.
 - BUSY_FACTOR Percentage of time during which an agent plans to be busy with an interactionrelated activity.
- 5. Set the optimizationGoal option. The value you set for this option depends on the value you set for **optimizationTarget**:
 - If your optimization target is ABANDONMENT_RATE, Genesys recommends that you use small values. For example, from 3 to 5.
 - If your optimization target is BUSY_FACTOR, Genesys recommends that you use big values. For example, from 70 to 85.
- If you chose a dual algorithm in Step 3 (SUPER_PROGRESSIVE_DUAL or PREDICTIVE_B_DUAL), specify a
 value for the proactiveRatio option.
 This option basically controls the minimal percentage of agents that will be recorved for processir

This option basically controls the minimal percentage of agents that will be reserved for processing proactive engagement interactions.

7. Set the refreshPeriod option. This option controls how frequently the pacing algorithm provides predictions. Genesys recommends that you use values from 1 to 5.

GWE_85_Cluster Stopped - Exited - \Applications\GWE_85\					
X Cancel 🐱 Save & Close 🐱 Save & New	🔀 Reload 🛛 📴 Unir	nstall 🛛 📫 Start 📓	Stop 🕏 Graceful Stop		
Configuration Options Permiss	sions Dep	endencies /	Alarms Logs		
🔲 😡 🙀 Delete 👲 Export 🍯 Import	🗊 🙀 Delete 💆 Export 暮 Import View: Advanced View (Options)				
Name 🔺	Section	Option	Value		
T Filter	Filter	Filter	Filter		
∃ pacing (7 Items)					
pacing/algorithm	pacing	algorithm	SUPER_PROGRESSIVE		
pacing/chatGroups	pacing	chatGroups	Web Engagement Chat		
pacing/optimizationGoal	pacing	optimizationGoal	3		
pacing/optimizationTarget	pacing	optimizationTarget	ABANDONMENT_RATE		
pacing/proactiveRatio	pacing	proactiveRatio	0		
pacing/refreshPeriod	pacing	refreshPeriod	5		
pacing/voiceGroups	pacing	voiceGroups			

Pacing algorithm settings

End

Next Steps

Configuring the Agent Groups

Configuring the agent groups

In the previous procedure, you set the **algorithm** option according to the size of your agent group and the type of traffic the algorithm should handle. In this procedure, you configure your agent groups for the pacing algorithm to use.

When you install Genesys Web Engagement, the Provisioning Tool automatically creates the following agent group:

• Web Engagement Chat

In the steps below, you'll confirm that the agent group was created and then add agents to it.

GWE_85_Cluster Stopped - Exited - \Applications\GWE_85\					
🗙 Cancel 🛃 Save & Close 🛃 Save 🛃 Save & New	🔀 Cancel 🖃 Save & Close 🖃 Save 📓 Save & New 🛛 🔯 Reload 🛛 🙀 Uninstall 💷 Start 💷 Stop 💦 Graceful Stop				
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T Filter	Filter	Filter	Filter		
∃ pacing (7 Items)					
pacing/algorithm	pacing	algorithm	SUPER_PROGRESSIVE		
pacing/chatGroups	pacing	chatGroups	Web Engagement Chat		
pacing/optimizationGoal	pacing	optimizationGoal	3		
pacing/optimizationTarget	pacing	optimizationTarget	ABANDONMENT_RATE		
pacing/proactiveRatio	pacing	proactiveRatio	0		
pacing/refreshPeriod Configure new agent groups	pacing	refreshPeriod	5		

Important

You can use your own groups instead by changing the value of the chatGroups option to the names of other groups you configured.

Start

1. Open Genesys Administrator and navigate to **Provisioning > Accounts > Agent Groups**. Make sure that the Web Engagement Chat group is created. You can use the filter to display the groups.

Ag	ent Groups		
ŧ) 🔻 同 New 💁 New Folder 📝 Ed	it 🙀 Remove 🖬 Change state	88 2
	Name 🔺	State	
T	Web Engagement	Filter	
Vie	w: 📰 Root 👂 🚞 Agent Groups		
	Web Engagement Chat	Enabled	

The default agent groups

- 2. Navigate to **Provisioning > Accounts > Users.**
- 3. Select an agent that should manage Web Engagement interactions and click Edit....
- 4. Select the Agent Group tab and click **Add**. The Browse dialog opens.
- 5. Select one of the groups and click **OK**.

cspencer - \Persons\		
🗙 Cancel 🛃 Save & Close 🛃 Save 📓 Save & New	w 🛛 📴 Reload	
Configuration Options Permissions	Dependencies Member Of Agent Groups	
🖬 Add 🍪 Edit 🙀 Remove		
Name 🔺	State	
Bluesky	Enabled	
OpenMedia	Enabled	
Web Engagement Chat	Enabled	

The agent named Spencer now belongs to the Web Engagement Chat group.

6. Repeat Steps 3-5 for each agent you want to add to the chat agent group.

End

Using Agent Groups to configure pacing settings

Starting with version 8.5.000.33, Web Engagement allows you to use Agent Group objects as the primary way to configure pacing settings. You can still configure these settings in the Web Engagement Cluster or Web Engagement Server application objects, but settings configured in the Agent Group objects have a higher priority.

Note: You must enable the Access to Web Engagement Pacing Configuration privilege for any users who need to control pacing settings.

To view and manage pacing configuration settings for Agent Groups, open the Genesys Web Engagement Management interface and select **Pacing**. To access the Genesys Web Engagement Management interface, open a browser and go to:

http(s)://<GWE Load Balancer host>:<GWE Load Balancer port>/server

The load balancer will redirect requests from *GWE Load Balancer ports* to the port with the ID **ui**, as defined in the Genesys application (see Configuring the Cluster Application).

You'll be prompted for a **user ID** and **password**. After you log in, you can select **Pacing** to view and manage the pacing configuration settings. From the **Pacing** page, you can manage Agent Groups that have been added to the list, or add new groups. **Note:** You can still configure these options in the Web Engagement Cluster or Web Engagement Server application objects, but options configured on the **Pacing** management page have a higher priority.

Important

To manage pacing configuration settings using the Web Engagement Management tool, your user ID must be assigned to a role with the required permissions. If you do not see any menu options, your user ID is not authorized to manage pacing configuration settings using this tool.

Adding a group

To add a new agent group, click **Add group**, and use the search bar (or browse the list) to find the group you want to add. Click **Add** to add the group to the Agent Groups list:

o Web Engagement		Pacing	
User Groups			Q. Se Lich for User Group Add
Add group	٩		User Groups
Name 🔻			Acme_Billing
All_Platinum_Agents			AgentGroup
All_Premium_Agents			Bluesky
All_Standard_Agents			Chat distribution for processing
Any_Agent			Customer_Care
Billing			E-mail distribution for processing
Customer_Service		44	E-mail QA review group
			GPE 1
			GPE 2

After a group is added to the Agent Groups list, it no longer appears in the list of available groups that can be selected when you click **Add group**.

Sorting and filtering agent groups

You can sort the Agent Groups list by **Name**, or use the **search** button to filter the list or locate a specific group:

User Groups Add group	٩
Name 🕶	
All_Platinum_Agents	
All_Premium_Agents	
All_Standard_Agents	
Billing	
Customer_Service	

Deleting a group

If you hover your mouse over a group, a trash icon appears, which you can click to delete the group:

Name 🔻	Optimization Goal
All_Platinum_Agents	Optimization Based On
All_Premium_Agents	Recalculation Interval
All_Standard_Agents	Media

After you click the trash icon, you'll be asked to confirm the deletion. Click **Delete** to remove the selected group and its configuration settings.

Editing the pacing configuration options for a group

Selecting a group will display its options on the right:

ဗီ Web Engagement	Categories	Pacing	default 🕶
User Groups		Pacing Configuration	
Add group	ų	Pacing Algorithm To Use NON_PARA	METRIC
Name 🔻		Optimization Goal 2	
All_Platinum_Agents		Optimization Based On ABANDONN	IENT_RATE
All_Premium_Agents		Recalculation Interval 3	
All_Standard_Agents		Media chat	
Billing		Interaction Queue Webengage	ment_Chat 🔹
Customer_Service		Cancel Save	

You can then select the desired pacing configuration options. (If you make an invalid entry or selection, the management tool will prompt you to correct the error.)

Pacing Algorithm To Use	Specifies the type of pacing algorithm to be used by the system. Changes take effect after server restart.
Optimization Goal	Specifies the optimal percentage value for your chosen optimization target, which can be either ABANDONMENT_RATE or BUSY_FACTOR, as specified in the Optimization Based On field that appears just below this field.
Optimization Based On	Specifies whether to optimize based on ABANDONMENT_RATE or BUSY_FACTOR. Changes take effect after server restart.
Percentage Of Proactive Traffic	Specifies the minimum percentage of agent resources that are reserved for handling proactive interactions. If 0 is specified, no resources are specifically allocated to handle proactive interactions, but proactive traffic is still allowed. If 100 is specified, all resources are allocated to handle proactive interactions and no reactive interactions are allowed.
Recalculation Interval	Specifies the frequency, in seconds, of predictions produced by the pacing algorithm. Changes take effect after server restart.
Media	Indicates the interaction type (for example, chat). This value cannot be changed.

Pac	ing

	A list of the channels and queues used for tracking engagements. Note:
Interaction Queues	You must have at least one queue in this list.This list can only contain interaction queues. Virtual queues are not supported.

When you are finished making changes, click **Save**. You can also click **Cancel** to roll any changes back to their original settings.

Next Steps

• Return to the Genesys Web Engagement Features page.