

# **PureSuccess Handbook** *for PureCloud*

Drive your goals  
and grow your skills

Welcome to  
Genesys!

This is your handbook for all the assistance you'll need delivering great experiences to your customers with PureCloud.

We don't pretend that operating a customer experience (CX) platform is simple. There are specialized skills to master, processes to learn, and software to adopt before reaching your vision of success. We want you to have all the benefits of our experience helping businesses towards their CX objectives, whether that means higher customer satisfaction scores, better operational efficiency, or increased revenue. To get there, you'll need clear goals, expert guidance, and outcome-driven engagements with our CX professionals.

The resources in this document are designed to provide for the needs and challenges we know you might face along the way. So please take advantage of our expertise, and know that you're not in this alone.

PureSuccess is a



### Framework

of success planning, expert guidance, and engagements designed to produce the results you signed up for.



### Combination

of experts from a wide range of disciplines working together to provide you a clear path forward.



### Philosophy

that success doesn't happen by accident, only through a proactive and multifaceted execution of talent.



### Promise

to be with you at every step of your journey delivering satisfying experiences to your customers.

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## **Genesys Advisor**

Your trusted guide and point of contact

# Welcome aboard!

Your Genesys Advisor walks you through the onboarding checklist to get you started, engaging resources as necessary to ensure a smooth transition.

## **Success planning**

Jointly create a plan to track and enable your outcomes. We will establish milestones, drive progress through regular touch points, and discuss engagements from the catalog that can accelerate your results.

## **Business reviews**

Your Advisor conducts periodic reviews to discuss success plan progress and validate that your performance indicators are aligned to your goals.

## **Training and renewal recommendations**

Your Advisor monitors your proficiency and goals, and then makes proactive recommendations about closing knowledge gaps or adjusting your subscription to align with business objectives.

## **Product updates**

Your Advisor updates and advises you about new product functionality and changes to service.

## **Net Promoter Score (NPS) program**

Your Advisor facilitates the flow of feedback between you and Genesys leadership and follows up with action plans to solve your issue.

## Contact your Advisor

Questions? Contact your Genesys Advisor using the contact information at [know.genesys.com](https://know.genesys.com).



## Knowledge Network

All-in-one resource for everything Genesys

[know.genesys.com](https://know.genesys.com)

## Easily navigate resources

The Knowledge Network is your single gateway to all things Genesys. No need to bookmark a dozen sites. Just one: [know.genesys.com](https://know.genesys.com)

### Personalized content

When you go to the Knowledge Network and sign in, it knows who you are, what you bought, and only shows you what's relevant. Your content includes product-relevant Community posts, a link to your My Support page for case management, roadmap and release information, the service catalog, how to contact your Genesys Advisor, and more.

### Public content

Even without login credentials, the Knowledge Network lets you access technical documentation, training courses, developer tools, Community posts, and blogs.

### Join the Community

The home page lets you monitor recent activity in the Genesys Community, where you can join conversations with peers, ask questions, and contribute your own expertise. Go directly to the Community at [community.genesys.com](https://community.genesys.com).

### Cast your vote

We regularly review and accept feature suggestions from our customers. To suggest a feature, or to vote on features suggested by others, go to the **Product Ideas Lab** tile on the home page.

**Note:** You must have an Access Pass. Request one [here](#).

### Continuous development

New features for the Knowledge Network are in development all the time, so keep checking in. And please leave us feedback by clicking the **Submit Feedback** link at the bottom.



## Product Support

Contact our product experts to assist you

## Get help

PureCloud Customer Care provides a global, live answer service 24/7. You must be a *Designated Contact* to contact PureCloud Customer Care. We highly recommend that Designated Contacts take the brief eLearning course, [PureCloud Customer Roles and Responsibilities](#).

## Find answers

Our online resources provide answers to a wide range of questions:

- **Resource Center** – Search PureCloud technical documentation at [help.mypurecloud.com](http://help.mypurecloud.com).
- **Community** – Ask questions and search discussions at [community.genesys.com](http://community.genesys.com).
- **Developer Center** – Get tools and tips for using our public APIs at [developer.mypurecloud.com](http://developer.mypurecloud.com).

## Connect to My Support

Access the My Support portal through [know.genesys.com](http://know.genesys.com) or go straight to the login page [here](#).

## Let us help you

[Call us](#) or [request a chat](#) from Customer Care.

## Stay informed

Our continuous delivery model means no versions to keep track of. PureCloud release notes keep you up-to-date on the functionality we're adding. Subscribe [here](#).

For notifications on operational issues, system availability, and incident information, subscribe [here](#).

## Learn more

Get the details of Customer Care prerequisites for making a call, severity levels, target response times, escalation management, and response policy [here](#).



## Training

Accelerate adoption with our learning resources

# Cultivate in-house talent

Become more self-sufficient with training resources that equip your personnel with the skills to maximize the value of PureCloud.

## Subscribe to our expertise

Become a PureCloud expert with a comprehensive mix of interactive course work, discussions, events, and certifications. The PureCloud Training Subscription gives you access to classes, materials, and our CX experts, so you can grow the skills necessary to drive meaningful experiences for your customers from within.

[Jump to the catalog to learn more.](#)

## Get certified

Genesys-certified personnel bring more rewards to the organizations that employ them. That's why each PureCloud Training Subscription includes all of the vouchers needed to test for the following certifications. For more information about becoming PureCloud certified, contact us at [education@genesys.com](mailto:education@genesys.com).

### Genesys Certified Associate (GCA)

The GCA proves that you have the basic foundation to successfully administer and operate PureCloud.

### Genesys Certified Professional (GCP)

After you become a GCA, you can move on to become a GCP, which proves your knowledge of advanced functionality in the areas of implementation, reporting and analytics, administration, and call routing design.

Training you need, when you need it

Learn more about our free eLearning options at [training.mypurecloud.com](https://training.mypurecloud.com).

Browse our learning paths for various roles in your organization to become CX pros at [training.genesys.com](https://training.genesys.com).





## Service Catalog

Accelerate results with expert engagements

### Get ready

Prepare to go live with new capabilities

- [PureCloud Training Subscription](#)
- [VoIP Health Assessment](#)
- [Testing Strategy Review](#)
- [Operational Readiness Review](#)
- [Agent Scripting Quick Start](#)
- [Quality Evaluation Quick Start](#)
- [Dialer Campaign Quick Start](#)
- [Standard Integration Quick Start](#)
- [Web Services Data Actions Quick Start](#)

### Go

Deliver customer experiences with agility

- [Technical Account Manager](#)
- [Token Pack](#)

### Level up

Boost your capabilities with advanced features

- [Amazon Lex Bot Integration Quick Start](#)
- [PureCloud API Quick Start](#)
- [API Proof of Concept](#)
- [Advanced API Development](#)
- [Omnichannel Optimization](#)
- [Workforce Management Optimization](#)
- [PureCloud Training Subscription](#)

#### Contact your Advisor

to know if purchasing one of these engagements will help drive the goals in your success plan.



# PureCloud Training Subscription

Become a PureCloud expert with a comprehensive mix of interactive course work, discussions, events, and certifications.

## How it works

Receive one year of access to PureCloud training resources, which includes:

### Courses

Take self-study, instructor-led, and virtual instructor-led courses:

- Implementation
- Contact Center Administration
- Reporting and Analytics

Keep checking back with us as we'll continue to add courses to the subscription package throughout 2019, such as Advanced Architect (designing call flows), APIs, Integrations, Scripting, Quality Management, Workforce Management, and Outbound Dialing.

### Certifications

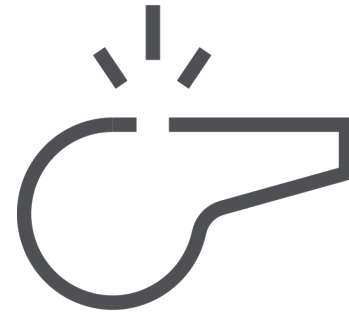
Receive all vouchers required to test for these certifications:

- PureCloud Genesys Certified Associate
- PureCloud Genesys Certified Professional

### And more...

The subscription also includes:

- Access to the expert-led Skills Lab within the Genesys Community
- Admission to CX Education Day
- Access to the course e-book library



**Goal:** Increase self-sufficiency by building in-house experience and expertise.

**Remote or onsite:** Both

**Duration:** 1 year

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# VoIP Health Assessment

Validate your production network for quality voice performance.

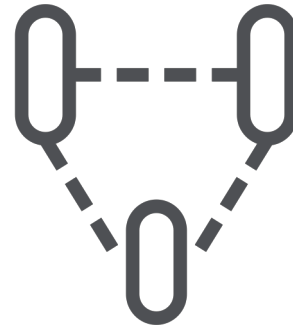
## How it works

This is a remote engagement that analyzes your infrastructure to determine QoS tagging behavior and concurrent call capacity. A typical engagement goes like this:

1. Kick-off call
2. Deployment of test PCs (sequencers)
3. Completion of network documentation
4. Confirmation of Genesys access to your environment and test PCs
5. VoIP health assessment
6. Notification of assessment results
7. Delivery of final report

## Prerequisites

- QoS enabled
- ICMP/UDP allowed through network
- Test machine on VLANs to be tested



**Goal:** Test voice paths to confirm end-to-end QoS, mitigating risk to audio quality.

**Remote or onsite:** Remote

**Duration:** Varies by number of VoIP VLANs and WAN links

## What is QoS?

Quality of service (QoS) is the measurement of overall performance of a telephony or computer network. QoS considers such things as packet loss, bit rate, throughput, jitter, transmission delay, and availability.

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# Testing Strategy Review

Build test cases using Genesys best practices and business use cases to give you peace of mind.

## How it works

This is a remote, 12-hour engagement spread across 1 week. During this engagement, the PureCloud expert will:

1. Conduct a 4-hour review of overall business use cases and strategy.
2. Conduct a 4-hour session to provide feedback and help create example test cases. We will:
  - Ensure test cases are tied to defined outcomes.
  - Understand and document the end-to-end process and success criteria.
  - Create a rollback plan in case of production impact from change.
3. Provide follow-up consultation for up to 4 hours across 5 business days following the first engagement.

## Prerequisite

Functional Requirements document or similar from which to create sample test cases



**Goal:** Build test cases aligned to use cases that mitigate risk, reduce downtime, and minimize the impact on users.

**Remote or onsite:** Remote

**Duration:** 12 hours spread across 1 week

## Why review your testing strategy?

It's far more expensive and disruptive to fix problems when you're live in production than it is beforehand with a proper testing plan. When you set up test cases to align with your business goals during the testing stage of the implementation, you'll see the results you want faster after going live.



# Operational Readiness Review

Ensure your business is following operational best practices to decrease downtime and improve the overall experience operating PureCloud.

## How it works

This is a 40-hour engagement spread across 2 weeks. During this engagement, the PureCloud expert will:

1. Conduct a 2-hour kickoff call to review the overall process, goals, and key roles.
2. Conduct 3 days of on-site resource shadowing of your operations staff to assess your usage of best practices, areas of improvement and efficiencies, and configuration optimization. Potential targeted areas include:
  - Troubleshooting processes
  - Configuration change practices
  - Training gaps
3. Conduct a 2-hour remote session to discuss the outcomes of the shadowing sessions and provide a report on our recommendations.
4. Provide follow-up consultation for up to 4 hours across 5 business days following the first engagement.

## Prerequisites

- Identification of the roles that will manage the applications and processes around your PureCloud solution to include in this review
- Production traffic live on PureCloud for over 1 month



**Goal:** Develop a comprehensive report on the strengths and weaknesses of your organization's ability to effectively operate PureCloud.

**Remote or onsite:** Both

**Duration:** 40 hours spread across 2 weeks

## Change is hard

But the results you're looking for aren't possible unless you can master all of the tools, processes, and skills that you need to deliver a customer experience. An assessment like this identifies gaps in your preparations to go live as your organization undergoes the significant change of adopting a new CX technology platform.

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# Agent Scripting Quick Start

Learn how Agent Scripting can improve interactions with your customers with this interactive workshop.

## How it works

This is an 8-hour, remote engagement. The PureCloud expert will:

- Review agent script functionality and options.
- Configure one basic agent script related to your use case.
- Demonstrate the overall agent script experience.
- Equip you with the knowledge to create and update additional agent scripts.

## Prerequisite

A configured, production PureCloud solution



**Goal:** Learn proper use of Scripting functionality and configure one basic script.

**Remote or onsite:** Remote

**Duration:** 8 hours

## What are scripts?

Scripts help agents process interactions by presenting them with details about the caller or contact, often with fields for collecting or updating information. Properly designed scripts ensure consistent handling of interactions.



# Quality Evaluation Quick Start

Learn how to set up your first quality evaluation form and policy with this interactive workshop.

## How it works

This is a 4-hour, remote engagement with a PureCloud expert followed by optional consulting hours. During this engagement, the PureCloud expert will:

- Demonstrate the quality evaluation experience.
- Review quality evaluation functionality and options.
- Configure one basic quality evaluation form and policy related to your use case.
- Equip you with the knowledge to create and update quality evaluations.
- Provide remote follow-up consulting for up to 4 hours in the 5 business days following the engagement.

## Prerequisites

- Completion of the PureCloud Quality Management training course
- A configured and working inbound voice solution



**Goal:** Learn proper use of Quality Evaluation functionality and configure one basic evaluation.

**Remote or onsite:** Remote

**Duration:** 4 hours

## Why use Quality Evaluation?

By evaluating and scoring conversations, you can identify high performers for positive feedback, agents who need more training or coaching, and situations that merit modification of call scripts.

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# Dialer Campaign Quick Start

Learn how to set up and configure dialer campaigns in PureCloud in these interactive sessions.

## How it works

This is a remote engagement spread across 2 weeks. During this engagement, the PureCloud expert will:

1. Conduct a 4-hour call to do the following:
  - Review dialer campaign functionality, configuration options, and best practices.
  - Configure one basic outbound campaign.
2. Conduct a 2-hour call to review any related questions and prepare you for creating and updating additional campaigns.
3. Provide follow-up consultation for up to 6 hours

## Prerequisites

- Completion of the PureCloud Outbound Dialing training course
- A dialable contact list ready for import into PureCloud in .csv format



**Goal:** Learn proper use of dialer campaign functionality and configure one basic campaign.

**Remote or onsite:** Remote

**Duration:** 12 hours across multiple touch points

## What are dialer campaigns?

Dialer campaigns automatically dial the phone numbers of people on a contact list using a prescribed set of rules. This increases productivity by screening out answering machines, busy signals, and non-completed calls – agents only receive calls that reach a live person.





## Standard Integration Quick Start

Integrate PureCloud into your existing infrastructure to eliminate redundant sources of data.

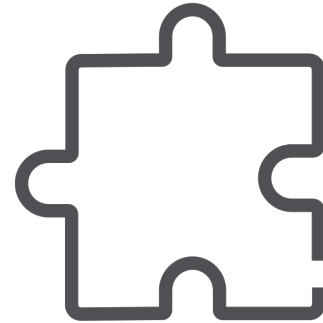
### How it works

This is a 6-hour engagement spread across 1 week. During this engagement, the PureCloud expert will:

1. Conduct a 4-hour call to do the following:
  - Review your chosen integration, configuration options, and best practices.
  - Configure the integration.
  - Demonstrate the integration experience.
2. Conduct a 2-hour call to review any related questions and prepare you for future updating of the integration.

### Prerequisites

- Completion of the PureCloud Implementation and PureCloud Integrations training courses
- A configured, production PureCloud solution
- Access to and knowledge of the system to be integrated



**Goal:** Learn proper configuration of standard PureCloud integrations and configure one basic integration.

**Remote or onsite:** Remote

**Duration:** 6 hours spread across 1 week

### What is a standard integration?

Integrations extend PureCloud functionality by connecting to systems used by your organization. For example, you can connect to your single sign-on (SSO) service so that users can enter their universal credentials when logging into PureCloud. Or you can connect to your human resources service to auto-populate employee names and job titles.



# Web Services Data Actions Quick Start

Leverage the data from your web-based services to extend PureCloud functionality.

## How it works

This is a 6-hour engagement spread across 1 week. During this engagement, the PureCloud expert will:

1. Conduct a 4-hour call to do the following:
  - Review your chosen data action, configuration options, and best practices.
  - Configure the data action.
  - Demonstrate the data action experience.
2. Conduct a 2-hour call to review any related questions and prepare you for future updating of the data action.

## Prerequisites

- Completion of the PureCloud Advanced Architect and PureCloud Integrations training courses
- Configured PureCloud solution where the data action will be embedded
- Access to and knowledge of the system to be integrated



**Goal:** Demonstrate basic end-to-end functionality between PureCloud and a third-party solution via data action.

**Remote or onsite:** Remote

**Duration:** 6 hours spread across 1 week

## What are web services data actions?

Web services data actions let you connect PureCloud to your web-based services. This allows you to create customized behavior for things like routing decisions or presenting information to an agent in scripts.



# Technical Account Manager

A Genesys Technical Account Manager brokers a relationship with technical resources within Genesys and provides hands-on guidance during onboarding, go-live, and throughout your journey.

## How it works

A Technical Account Manager becomes your personal concierge for all interactions with Genesys, including:

- Enabling quick and effective support that's specific to your unique environment through Genesys Customer Care
- Scheduled customer visits
- Meeting after go-live to address any pending items
- Weekly touchpoint with operations team to review cases, questions, and concerns
- Monthly meetings with key resources for account readout – training/operational opportunities, case trend analysis, SLTs, critical issues/outage RCAs, best practices
- New deployments and roll-outs
- Feature request management



**Goal:** Receive hands-on guidance from a Technical Account Manager to ensure success.

**Remote or onsite:** Both

**Duration:** 30 days, 90 days, or 1 year of continuous engagement

## Minimize risk and manage change

A Technical Account Manager is a proactive advocate for your success who drives issues to resolution and provides constant updates. This function is ideal for companies that need some extra help navigating the changes involved in adopting a CX technology platform.

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## Token Pack

Purchase tokens to allocate funds for services and training throughout the year when your needs are not yet fully defined.

### How it works

Purchase tokens in packs of 10, and your dashboard keeps track of the tokens you have to spend. Work with your Genesys Advisor to identify services and training that will help you accomplish the goals in your success plan. Then use your tokens to purchase and begin the service – no separate purchase order process needed.



**Goal:** Provide the flexibility to purchase engagements from the Service Catalog between renewals without additional purchase orders.



# Amazon Lex Bot Integration Quick Start

Accelerate a proof-of-concept solution focused on solving for your chosen Amazon Lex Bot use case.

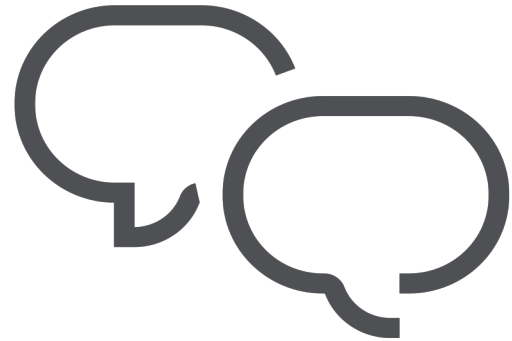
## How it works

This is a 4-hour, remote engagement with a PureCloud expert followed by optional consulting hours. During this engagement, the PureCloud expert will:

- Define use cases for a Lex integration.
- Install the application and assist with authorizing PureCloud on your AWS environment.
- Show you how to configure one Call Lex Chatbot action as a basic, proof-of-concept solution related to the defined use case.
- Review the solution against the use case goals with documented steps to demonstrate functionality.
- Provide remote follow-up consulting for up to 4 hours in the 5 business days following the engagement.

## Prerequisites

- Completion of the PureCloud Advanced Architect training course
- AWS environment with a configured Amazon Lex bot



**Goal:** Build a basic proof-of-concept solution to solve for a desired use case.

**Remote or onsite:** Remote

**Duration:** 4 hours

## What does an Amazon Lex Bot do?

With the Amazon Lex integration, you can easily build a voicebot with natural language understanding (NLU) right in your IVR. Your customers can speak naturally, and you can quickly understand their intent and better route the call.

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## PureCloud API Quick Start

Discuss API best practices, get answers to API questions related to your developed solution or use case, and navigate available resources for continued self-learning.

### How it works

Engage with a PureCloud API expert in mentoring sessions on API knowledge and usage. Focus on your chosen API solution or use case and learn to navigate resources for continued self-learning.

### Prerequisites

- Familiarity with REST APIs and common JavaScript libraries
- Completion of the PureCloud API training course
- A list of API topics of interest to ensure maximum value during discussions



**Goal:** Learn API best practices and recommendations related to a chosen use case.

**Remote or onsite:** Remote

**Duration:** 2 days, 4 hours per day

### What is an API?

An application programming interface (API) is a set of tools that allow two software programs to communicate with each other. The PureCloud API allows your software developers to incorporate PureCloud data and features within your own applications, allowing you the flexibility to build or customize functionality to your specific needs. For example, the API can allow your customers to chat with agents directly from your website.

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## API Proof of Concept

Leverage the robust PureCloud public APIs by creating a proof-of-concept solution focused on solving a chosen use case.

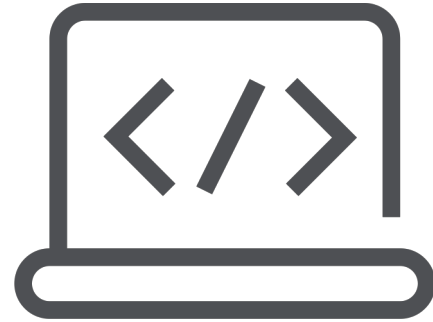
### How it works

This is a 40 hours of engagement that can be distributed during across 2 consecutive weeks and follows this structure:

- 1. Definition:** Requirements workshop to define the vision and scope of the engagement.
- 2. Education:** Discussion of relevant API methods, best practices, and Developer Center information.
- 3. Creation:** Creation of a proof-of-concept solution per requirements definition.
- 4. Validation:** Review of the proof-of-concept solution against use case goals with documented steps to demonstrate functionality.

### Prerequisites

- Familiarity with REST APIs and common JavaScript libraries
- Completion of the PureCloud API training course
- Location to host the proof-of-concept solution



**Goal:** Develop a proof-of-concept API solution that solves a chosen use case.

**Remote or onsite:** Remote

**Duration:** 40 hours over 2 consecutive weeks

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## Advanced API Development

Take your API development to the next level with Genesys tools and processes to achieve better results and faster time-to-value.

### How it works

This is 4 consecutive weeks of engagement that follows this structure:

1. Examine your use cases and desired outcomes to validate API solution designs.
2. Understand your ongoing business drivers and needs related to developed API services and your PureCloud solution.
3. Co-create proof-of-concept solutions per requirements definition.
4. Follow-up API consultation.

### Prerequisites

- Familiarity with REST APIs and common JavaScript libraries
- Location to host the proof-of-concept solution



**Goals:** Grow your capabilities for using PureCloud APIs and build one proof of concept based on selected use cases.

**Remote or onsite:** Both

**Duration:** 4 consecutive weeks

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# Omnichannel Optimization

Learn what the big deal is about “omnichannel” and how it can improve communication with your customers.

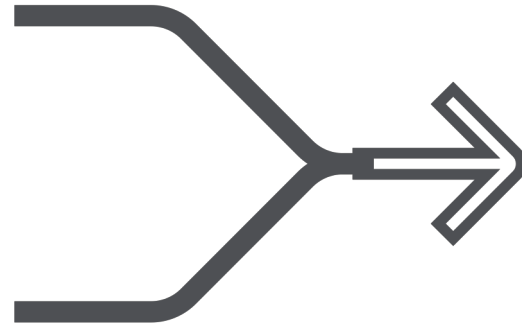
## How it works

This is a 40-hour engagement across the following workshops.

1. **Definition.** Understanding the flow of your business and how your customers engage with your agents (1 day).
2. **Education.** Consulting on suggested channels to add to your PureCloud solution (2 days).
3. **Review.** Remote review of deployed solutions (1 day).
4. **Follow-up.** Remote consultations for 5 business days following the Review session (totaling 8 hours).

## Prerequisites

- A configured, production PureCloud organization
- Proper licensing to support omnichannel



**Goal:** Receive customized recommendations on how to implement and configure additional channels in PureCloud.

**Remote or onsite:** Remote

**Duration:** 40 hours across multiple workshops

## What is “omnichannel”?

Omnichannel means ensuring that data and context from the initial contact carry over to subsequent channels. This prevents situations where a customer enters their account number when prompted by the IVR, and then the first agent they come into contact with asks, “Can you give me your account number please?” No matter where the conversation begins or ends, customers never need to repeat themselves, and agents have the information they need to provide smoother interactions.

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# Workforce Management Optimization

Validate that you're using PureCloud Workforce Management to its maximum potential for your operation.

## How it works

In this engagement, we will do the following:

- 1. Pre-visit preparation.** Preparation begins prior to the visit. The PureCloud expert will:
  - Request data on issues impacting your operation.
  - Lead a 1-hour kick-off call to discuss the objectives, major pain points, on-site agenda, and data requested.
- 2. On-site discovery.** The expert comes to you for 2.5 days of meetings to share best practices and review the current state of your methods, configuration, and training.
- 3. Post-visit follow-up.** Within 5 business days of the on-site discovery, the PureCloud expert will:
  - Deliver a document detailing the findings from the on-site discovery, the activities performed, and recommendations for improvement.
  - Lead a 2-hour follow-up call to ensure new and outstanding questions are answered.



**Goal:** Learn the most efficient use of PureCloud Workforce Management.

**Remote or onsite:** Both

**Duration:** 40 hours across multiple workshops

## What is workforce management?

Workforce management features simplify the process of forecasting interactions and scheduling agents. This results in optimized work performance for achieving your operational goals.

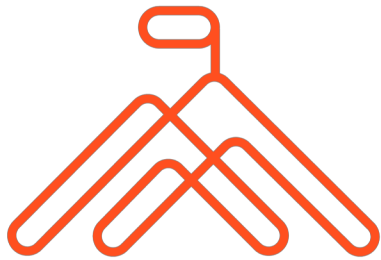
## Prerequisites

- Completion of the PureCloud Workforce Management training course
- PureCloud Workforce Management configured and collecting historical data for a minimum of 30 days

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Pure**Success**<sup>™</sup>

Illuminate your  
path to success