

# 2023 contact center **BUYER'S GUIDE**

Technology that supports customer  
and employee experiences of the future  
— and the trends driving adoption



# New ways to win in 2023



Customer expectations are rising faster than organizations can keep up with them. And employees have more choices than ever before about where – and how – they work.

Against a backdrop of increasing economic uncertainty and the need to prove ROI, customer experience (CX) leaders need clear focus to stay on track and ahead of the competition.

In 2023, technology and employee experience will play elevated roles in redefining the industry. The growth of innovation in automated business processes, advanced analytics and artificial intelligence (AI)-powered orchestration will reshape the customer experience. Together they're transformative. And they offer unprecedented simplicity, efficiency and agility.

Based on the latest research, this guide defines the specific capabilities you need to create value for customers, employees and your business in 2023 – and for long-term relevancy and resiliency.



42% of executives worldwide say a top goal for measuring the customer experience is to identify opportunities for product improvements or innovation.

**Beyond NPS: CX measurement reimagined**



### **EXPERIENCE ORCHESTRATION**

Make every experience as efficient as possible by coordinating every step of every interaction on a single platform. Using automation gives you real-time data about customers and agents – guiding decisions so you're proactive and act when it matters.



### **DIGITAL EMPOWERMENT**

Continually connect all your customer data, aligning your technology and data strategy around customer journeys. This paves the way for personalization, real-time insight and journey management – increase engagement without increasing headcount.



### **EFFORTLESS INNOVATION**

Move beyond inefficient, siloed technologies and spend valuable technical resources where they'll have the most impact. Adapt faster on a modern AI-powered platform that can use all your data and give you the insights needed to act in real time.



### **UNLEASH EMPLOYEE SUPERPOWERS**

Technology enabled the growth of the remote workforce and now employees have more choices. Equip employees to be successful in the moment and develop skills that grow their careers long term.



### **OPTIMIZE JOURNEYS**

Look at experiences from the customer perspective. Understand their needs, sentiments and steps they've already taken to eliminate complexity and frustration. By using journey-based metrics, you can capture the value your customers expect and the KPIs that drive your business.



### **GAIN FREEDOM TO CO-CREATE**

Enable agility and rapid innovation with cross-functional groups that break through rigid team structures. A composable architecture enables you to use apps from a cloud solution marketplace or your developer ecosystem.

2023 contact center buyer's guide

# EXPERIENCE ORCHESTRATION

# Experience orchestration

Customers want fast and effective experiences. Employees want to be successful problem-solvers and valued for their contributions. The challenge is deriving meaning and value from all your data across every source. That requires a platform that allows you to orchestrate the best employee and customer experiences.

## Transformation is about relationships

Experience orchestration enables you to coordinate technology based on the experience you want your customers to have – building deeper, more loyal relationships as part of a guided process. By visualizing the ideal state, you can resolve their issues faster. You become proactive and use insights to focus on innovations that will be most impactful. This is where your transformation begins.



## Reimagine how you design experiences

Your employees are problem-solvers. Enable those skills with an open-API composable platform that lets them innovate together, solve problems faster and add capabilities that serve customer journeys. This type of platform also aggregates data from all sources, removing obstacles to personalizing experiences globally while complying with local regulations and certification requirements.

## Automate better outcomes

Turnkey digital capabilities and AI drive efficiencies. Automate interactions and put bots to work, quickly resolving issues using smarter and intent-driven conversational AI. Identifying customer behavior patterns helps you nudge them toward desired outcomes – and that improves the customer experience. Using predictive routing and determining the next-best action gets them what they want faster.

## Innovate using smart solutions

AI can give employees the knowledge they need through intuitive, easy-to-use tools. With all the relevant data they need in a single workspace – whether desktop or mobile – employees are better equipped to act on opportunities and even engage proactively. And when you know what's important to customers, you can focus your knowledge-creation efforts where they'll have the most impact.

# As you evaluate solutions

| ASK THESE QUESTIONS  | AND LOOK FOR THIS IN THE RESPONSES  |
|--|---|
| How does your solution accelerate problem resolution?                          | <b>Conversational AI</b> automates interactions using multilingual self-service bots that help complete transactions, answer questions or deliver the right offer at the right time. And with knowledge management tools, you can easily compile and access your content library, customer data and other resources. This enables bots and agents to accelerate problem resolution.                                 |
| How does your solution deliver relevant information to employees in real time? | Employees have everything they need, including relevant interaction context and data. A single customer view provides full visibility into the customer's historical journey. AI-enabled agent assist delivers proactive information so employees can easily deliver a great customer experience.   |
| Does your solution support customers proactively on digital channels?          | Using digital engagement automation, you can rapidly identify behavior patterns and inform orchestration decisions. <b>Predictive engagement</b> enables you to proactively intervene, focusing on high-value individuals to improve resolution speed and revenue potential. By digitally nudging people toward the outcome they want and that your business expects, you can use human resources more effectively. |
| Does your solution identify and analyze behavior patterns to guide routing?    | With <b>predictive routing</b> and next-best actions, you can use built-in AI automation to analyze behavior patterns, create models and identify best outcomes to improve customer-agent interactions. And with AI guiding the conversation, agents receive the insights and direction that make conversations effortless.   |
| Does your solution support knowledge sharing in real time or even proactively? | Activate knowledge using AI so you can answer questions before they're even asked. We make it intuitive and simple for both employees and customers to access up-to-date information using <b>AI-powered knowledge management</b> .   |

# DIGITAL EMPOWERMENT ACROSS CUSTOMER JOURNEYS

# Digital empowerment across customer journeys

The challenges of digital come from all directions, often causing disjointed multichannel strategies instead of true transformation. Adding new channels without a cohesive, connected strategy results in a big divide between who owns the channel, the technology and the KPIs.

In a **new report by FT Longitude**, 64% of bank leaders cite siloed strategies around products and channels rather than customer journeys and data as one of their biggest barriers to improving the experience and building customer loyalty.

## Accelerate your digital strategy

In 2023 and beyond, organizations will align their strategies and technology around a connected, consistent experience that includes digital channels and voice. Those connections let you transform experiences with personalization and optimize those experiences based on contextual understanding.

## Continually connect and refine data

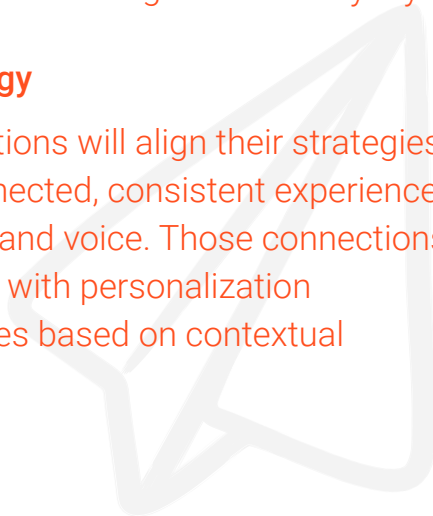
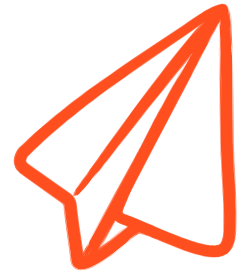
Integrating all digital channels, including self-service, lets you build knowledge once and deliver it on every channel – directly to your customers or via bots and agents through a centrally managed knowledge portal. In this way, you're showing customers that you really know them and their preferences, by having visibility into what they're doing now and have done before. You can predict their behavior, reach out proactively and guide customers toward the best result.

## Magnify reach and understanding

Agents who can access the right insight at the right time can create excellent CX. Working on a single workspace balances usability and customization with rich data and insights. As customers interact with your bots, agents and content on different channels, they leave clues about who they are and what they want. Link these clues and identities across all channels and CRM platforms to provide the whole picture of the customer to your agents.

## Respond quickly and learn

When you know what's important to customers, you can focus your knowledge-creation efforts where they'll have the most impact – based on data. Decision-making based on data means that administrators can quickly modify workflows, drive toward goals and deliver on KPIs by optimizing existing resources.





# As you evaluate solutions



| ASK THESE QUESTIONS  | AND LOOK FOR THIS IN THE RESPONSES  |
|--|---|
| How does the solution's virtual agent technology support customer interactions?  | The best <b>bots and virtual assistants</b> serve as an extension of your team. Look for intelligent bots with natural language understanding and the ability to make a seamless transition to a live employee when needed.   |
| Can customers engage with digital assistants using natural language, including speech?   | Digital assistants that use natural language processing can handle routine queries via <b>speech and capture intent</b> . When they respond via synthesized speech, the intention should be modeled appropriately. Without proper nuance, communication breaks down – and that affects the customer experience. |
| Can customers pause conversations and later resume them – in the same channel or another? And will the solution recognize their history and goals? | All <b>engagement channels</b> are integrated so conversations can start, stop and transition across them. If a customer pauses a conversation on a messaging app, it can be restarted on any channel, including voice, where all the context and history are passed to agents.                                 |
| How do you guide customers to the destination they want or the one you want them to find?  | With <b>predictive engagement</b> , you can reach out to your customers who need help to get to a great outcome with a web message, or make a perfectly timed content offer to increase conversions and satisfaction.   |
| Do customers get the same message across all channels, including self-service?   | With <b>knowledge everywhere capabilities</b> , you can build knowledge once and deliver it on every channel – directly to your customers or via bots and agents through a centrally managed knowledge portal.  |

**FREEDOM**   
**TO CO-CREATE**

# Operate as a composable organization

Enterprise innovation cycles have shortened dramatically. Throwing more resources at short-term problems causes new issues: technical debt, difficulty sustaining differentiation, and gaps in giving customers and employees what they need. Becoming more resilient and agile helps you adapt. But your development group and the business must organize — together — in a new way to drive a continuous co-creation mindset.

When a new threat, opportunity or disruption emerges, co-creation teams should form to evaluate, adapt and, when necessary, recreate the business to deliver unique value to customers.

## **Rethink your tech stack and break away from rigid team structures**

Businesses with tech stacks focused around microservices, open APIs and cloud-native platforms pave the way for innovation and access to a best-in-class ecosystem. With high demand for unified data and communications; global consolidation; and data virtualization; a composable CX platform makes even more sense.



## **Build quickly. Differentiate faster.**

Open platforms offer flexibility. You decide how your CX portfolio evolves with rich APIs, integration methods and dev tools. And because developers have ready-to-use connectors to industry-leading applications, more of their time is spent building differentiation. And they waste less time coding custom integrations.

## **Adapt easier and co-create better experiences in real time**

Add new capabilities from continuously expanding feature sets without the need for a resource-heavy investment. When you use a low-code CX orchestration toolset, all users quickly and easily assemble. They can combine and orchestrate a set of diverse capabilities — mixing and matching from a curated marketplace of apps, templates and blueprints.

## **Turn your CX architecture into a competitive advantage**

With a modern cloud platform, you can rely on an API-first, microservices-based, and highly secure and simplified environment that operates with the most aggressive SLAs. A composable architecture allows you to respond faster, including orchestrating data, interactions and journeys in real time for differentiation that's sustainable.

# As you evaluate solutions



| ASK THESE QUESTIONS   | AND LOOK FOR THIS IN THE RESPONSES  |
|---|---|
| <p>Describe the solution's cloud architecture, infrastructure and deployment options.</p>                         | <p>Depending on your organization's cloud configuration, you'll have different needs. Look for a solution that meets your requirements when it comes to <b>scale, global availability, architecture and deployment</b> preferences.</p>   |
| <p>How does the solution handle engagement on mobile, web, chat, phone, social, SMS and video?</p>                | <p>Your customer experience platform should equip you to <b>flow between channels</b> as easily as your customers do. It should leverage customer profile data and context across channels, give employees a full picture from a single view – and learn from it.</p>   |
| <p>Describe how the different applications that make up your cloud solution are integrated and work together.</p> | <p>A <b>composable cloud platform</b> lets you assemble, combine and orchestrate individual CX and employee experience capabilities in real time. This includes capabilities from four building blocks: product, marketplace, ecosystem and development. Mixing the optimal set of capabilities through rich APIs, integration methods, and developer and low-code tools ensures your architecture flows toward the future.</p> |
| <p>Describe how sensitive information is handled to protect customer data privacy.</p>                            | <p><b>Enterprise-grade security</b> enables you to resolve disputes and identify liability risks, set scheduling constraints and plan for service provisioning – while adhering to labor laws and worker agreements. Look for multifactor authentication, data anonymization even for data scientists, and a platform that encrypts call and screen recordings at the highest level of security.</p>                            |



#### ASK THESE QUESTIONS

#### AND LOOK FOR THIS IN THE RESPONSES

Describe what can be used “out-of-the-box,” integrated or custom-built.

As you consider solutions, evaluate the product itself, the **app and partner ecosystem** – and the platform access and resources to support development.

What APIs, tools and resources are available to developers?

A modern cloud solution should make integration and customization easy and accessible. Look for public documentation on the platform and its APIs; **developer resource centers**; and features like SDKs, embeddable frameworks, and blueprints or templates to accelerate development.

How does the solution approach integrations with existing systems across the CX ecosystem?

Look for a solution that distributes **historical and real-time data from every touchpoint** – inside and outside your contact center – to the systems each team uses. This enables every customer-facing team to understand each customer’s unique context and create the consistent experiences they demand.



# TURNKEY AI FOR EFFORTLESS INNOVATION

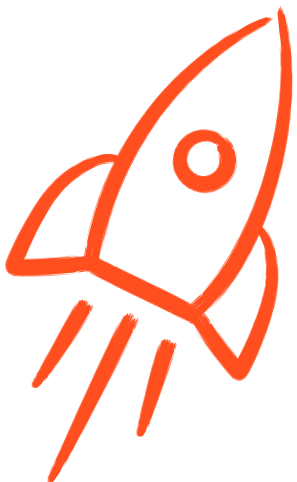
# Turnkey AI for effortless innovation

AI is no longer a luxury. According to research by MIT Technology Review, customer service is one of the three leading use cases for AI across industries. Businesses that want to automate processes and optimize faster can find help with new turnkey AI solutions. Using AI allows you to alleviate repetitive tasks, quickly adapt to increasing business demands, and improve experiences for customers and employees.

## Take full advantage of AI

Start with a platform that accesses and uses all data, mines that data for actionable insight, and acts in real time to deliver personalized, high-value experiences.

Freeing up resources with AI technology gives you more time to develop innovative initiatives for long-term success.



## Accelerate time to value

Using out-of-the box solutions with user-friendly features reduces the cost and effort of building AI projects. Ease of use also enables admins to configure processes and conversation flows to support changing customer needs – without requiring IT resources. And with a proven machine learning platform, you'll also reduce up-front data cleansing and prep work for a faster ROI.

## Automate smarter and adapt faster

Automation can handle common queries and transactions to free up employees for complex tasks. You'll have real-time data to identify, acquire and nurture customers – and take advantage of sales opportunities as they arise. When you use AI to identify data patterns and understand customer intent, sentiment and preferences, you'll gain visibility, pivot faster and reduce complexity.

## Optimize the entire AI experience

Using AI, you can create proactive personalized journeys that increase customer loyalty and your Net Promoter Score (NPS). That's because cloud platforms enable you to coordinate and optimize multiple AI capabilities. This also positively affects employee motivation, as they're empowered to deliver better customer experiences that contribute to your success.

# As you evaluate solutions



| ASK THESE QUESTIONS  | AND LOOK FOR THIS IN THE RESPONSES  |
|--|---|
| How does your solution reduce admin dependency on IT?  | With <b>user-friendly features</b> , admins can easily configure processes and conversation flows to support changing customer needs without IT. Admins can also initiate queue testing and determine effectiveness.  |
| Does your solution prepare and secure data for personalization?                                | Reducing up-front data cleansing and prep work <b>brings all data into a machine learning platform</b> , enabling you to extract ROI much faster. Identity resolutions also tie customer data into a single customer view for orchestration.  |
| How can your solution adapt to changing business or customer needs?                            | When you use AI to identify data patterns and understand customer intent, sentiment and preferences, you'll have more visibility. These insights reduce complexity and enable you to pivot faster.  |
| Can your solution coordinate multiple AI capabilities to optimize the entire customer journey? | Connect journeys with an <b>integrated ecosystem of AI</b> products that deliver personalized customer experiences. Along with this integration, you can visualize, optimize and manage customer journeys.  |
| How does your solution personalize the customer experience?                                    | By using AI for customer understanding, you can create proactive and personal journeys that increase customer loyalty and NPS. With natural language understanding, AI understands customers in their own words and language. And <b>speech and text analytics</b> can spot and tag topics and analyze customer intent and sentiment. |



# USE AI TO UNLEASH EMPLOYEE SUPERPOWERS

# Use AI to unleash employee superpowers

A new paradigm is emerging around employees – from agents to business users to developers. Research by MIT Technology Review finds that as recruiting becomes harder and more expensive, organizations are shifting to focus more on the employee experience. That means investing in learning and development, career paths, mental health, and workplace wellness. These businesses are finding that retention beats recruitment in every way. And it's AI that makes it possible.

## AI sets up agents for success

Using AI and automation, you can help agents by:

- Understanding customer identity and predicting intent
- Surfacing knowledge so they can solve common problems
- Using analytics to monitor performance and recommend coaching

In 2023 and beyond, organizations will increasingly look to AI tools to help supercharge the employee experience.



## Automate listening and learning

When AI tools capture and maintain 100% of employee-customer interactions, you eliminate inherent management bias. It's also easier for supervisors to understand employee needs and drivers; recognize innate skills, values and achievements; and use tools to develop more strategic and effective processes for all.

## Predict employee behavior by analyzing interactions in real time

With speech and text analytics built into your solution, your data can find patterns of excellence and opportunities for improvement. This data helps you understand the root causes of performance problems, such as inadequate training, and surface knowledge to seamlessly solve customer requests. You'll also build employee engagement with schedules based on more accurate forecasts.

## Motivate employees by gamifying the experience

Through an engaging user experience, you can nudge employee behaviors and values closer toward business goals. Simplify coaching to build confidence. And help employees manage and improve their performance throughout the development journey.

# As you evaluate solutions



| ASK THESE QUESTIONS  | AND LOOK FOR THIS IN THE RESPONSES  |
|--|---|
| Does the solution have an intuitive, web- and mobile-based user interface?   | Give agents and supervisors a single view of each customer using an <b>omnichannel desktop</b> . It simplifies interactions by conducting them in a single web browser. The desktop streamlines agent information access with all the apps they need right at hand.                     |
| How does the solution ensure the quality of interactions?  | <b>Record every interaction</b> across channels without losing any data. Access valuable Voice of the Customer insights, including trends, training opportunities and global compliance.  |
| How does the solution enable team collaboration and alignment for a remote or hybrid workforce?  | Employees can see their work translate into <b>real-time metrics</b> . It improves performance and boosts collaboration for stronger team dynamics – no matter where agents work from.  |
| What AI-powered forecasting functionality is available for the short and long term? Does it include capabilities for chat, email and social media? | <b>Forecast up to two years ahead</b> . Being able to determine staffing needs far in advance lets you optimize schedules, especially seasonally, to boost efficiency and control your budget. An AI-powered solution on a CX platform includes capabilities for every channel you use. |
| What tools does the solution provide to support employee onboarding, as well as continued learning, training and development?                      | <b>Embedded learning tools</b> enable new hires to become proficient faster, reducing onboarding costs. These tools also encourage existing employees to build new skills and enhance existing ones.  |



#### ASK THESE QUESTIONS

#### AND LOOK FOR THIS IN THE RESPONSES

How does the solution enable real-time performance visibility and improvement?

**Learning modules** let you train or inform your employees and assign assessment modules to better evaluate agent knowledge and skill levels.

What gamification and performance recognition tools does the solution offer?

**Gamified performance metrics** provide consolidated insights and actionable recommendations in real time to evaluate and strengthen development initiatives. Streamlined targeted coaching sessions between employees and managers improve outcomes faster.

How do the scheduling and forecasting capabilities account for employee preferences and shift swaps?

Automated processes **streamline forecasting and scheduling**, including shift allocation. You can set flexible rules to manage overtime, time-off, shift bidding and trades to give employees flexibility and autonomy without impacting your budget or productivity.



# OPTIMIZING END-TO-END JOURNEYS IN REAL TIME

# Optimizing end-to-end journeys in real time

CX measurement has long depended on periodic KPI tracking and after-the-fact customer surveys. But **Harvard Business Review** research found that nine out of 10 business leaders note the difficulty of identifying actionable insights, measuring all points along the customer journey, correlating metrics with business outcomes or identifying the root causes of problems.

## Measure. Monitor. Quantify.

We predict a major trend toward improving measurement and real-time analytics for customer experience. The shifts will include:

- Journey mapping to identify key moments that matter
- Connecting operational metrics and satisfaction metrics for a 360-degree view of experiences
- Developing advanced analytics dashboards for real-time decision-making and experience orchestration



## Monitor contact center health across all channels

Make it easy for contact center leaders to visualize and optimize omnichannel experiences and recognize changes in behavior. This means measuring and monitoring KPIs like average handle time, FCR, recontact rate, customer satisfaction, cost per contact and more. Look at these metrics across all channels before drilling down to understand and improve the performance of each individual channel.

## Analyze journeys to find root causes of problems

Identify where to focus your attention, especially the points where you can reduce blockers. Find the routes customers take to see where they're switching channels or completely abandoning the journey. Understanding this can help you improve the accuracy of call routing, escalation management and agent efficiency.

## Quantify the impact of changes in performance

Define global metrics that can be automatically calculated from the top down to single interactions. From these journey scores, you have guidelines for the most impactful enhancements. Analytics also help streamline escalation management. By measuring the impact of performance on business outcomes, you can prioritize areas for improvement using metrics that best capture the value your customers expect – and share these insights with your colleagues.

# As you evaluate solutions



| ASK THESE QUESTIONS  | AND LOOK FOR THIS IN THE RESPONSES   |
|--|--|
| How do you quantify the impact of changes in contact center performance?                       | Go beyond one-size-fits-all metrics and define global metrics that are automatically calculated at all levels down to a single interaction. Using <b>journey scores</b> , you can determine which enhancements will deliver the greatest impact to your customers – and your business.                       |
| How is data aggregated across integrated systems and used for further insights and analytics?  | Stream <b>aggregate data from all interactions</b> into your platform. Once captured, it needs to be transformed into AI-ready data so that you can take advantage of AI capabilities. All your products can benefit from the reuse and sharing of this data.  |
| Are real-time, on-demand and historical analytics and reporting capabilities easily available? | <b>Historical data, context and real-time insights</b> are available in a flexible dashboard. Robust reporting lets you track and analyze service levels, interaction times, resolution rates, customer satisfaction and other critical KPIs.  |
| How does the solution address issues with case and escalation management?                      | <b>Omnichannel analytics</b> enables escalation managers to address issues efficiently and at the right level. You'll reduce time spent combing through individual calls. And you can use actual customer behavior to identify lookalike audiences and efficiently size problems.                            |
| How does the solution orchestrate actions in real time?  | Look for a solution that can <b>improve journey outcomes</b> in real time by taking the most relevant interactions in the context of each customer's goals and experience – not just dynamically update content or offers.   |
| How does the solution recognize changes that affect satisfaction and performance?              | Intelligent alerts help you <b>monitor the health of customer experiences</b> across all contact center channels. You'll stay informed through email, SMS and in-platform messages when thresholds, anomalies, period-over-period changes and trend reversals are detected in any CX metric or business KPI. |

# Conclusion

Bringing together human interaction and technology – and harnessing connected data – is at the heart of delivering better experiences for customers and employees.

Powerful experience orchestration will play a bigger role in enabling brands to deliver consistent service while adding context that gives meaning to each interaction. And that means employees can provide the right level of connection in every interaction with your brand.

At Genesys, we believe it's going to drive big changes in reframing business imperatives through a lens of understanding on any channel – voice, digital and chat.

See how the Genesys Cloud CX™ platform can power your business in 2023 and beyond.

[Read more about it](#)





## 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® 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 CX™, 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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