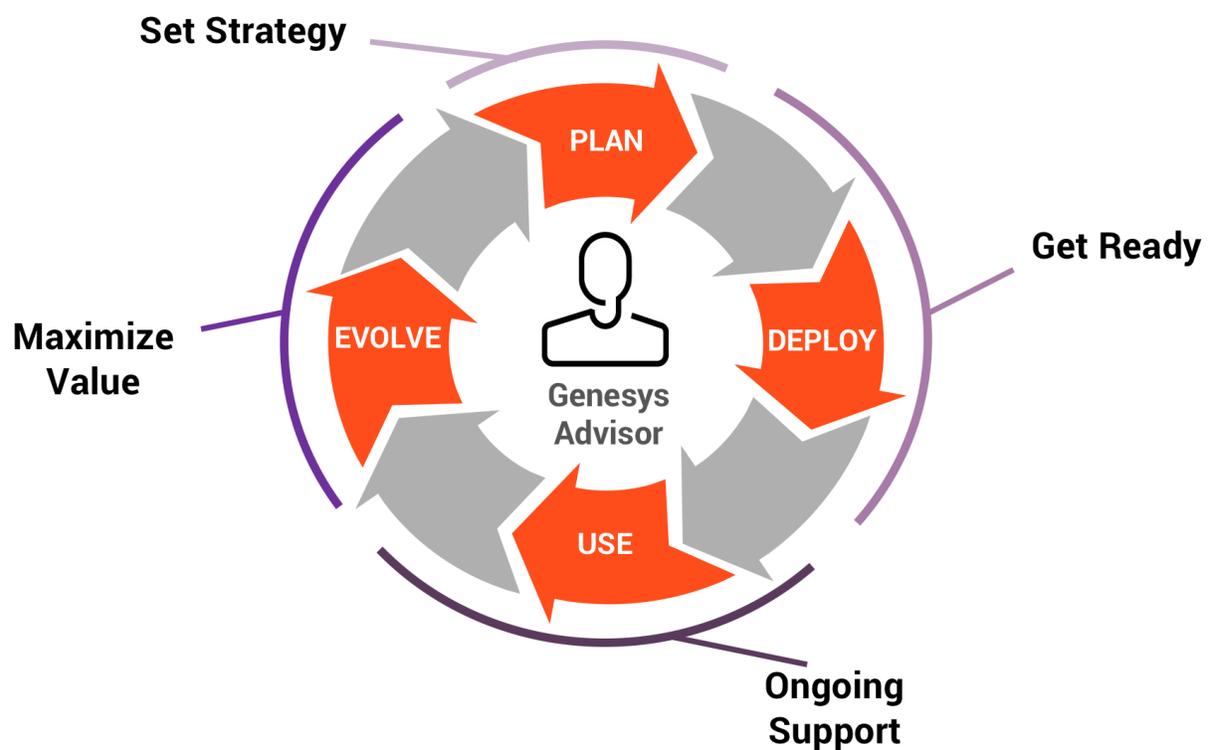


PureSuccess **Guide** for PureEngage

For those who want a mentor to get them started

PureSuccess Guide is the best fit for companies that aspire to deliver a premium experience to their customers but have changes to make to their organization first. These companies have a vision of their ideal customer experience but need help training their teams and adopting the technology. Let Genesys guide you to towards delivering your own top-shelf experience with instructor-led training and introductory consultations.



Build a roadmap to success and prepare to go live

Set Strategy – Establish vision and value

-  CX Strategy Pack
-  Financial Benefits Calculator
-  Financial Benefits Calculator Review

Get Ready: Business – Integrate new skills

-  CX Masters Series
-  Organizational Readiness Self-Assessment
-  Organizational Readiness Assessment with Review
-  Change Management Guide
-  Change Management Coaching Session
-  Change Management Advisory

Get Ready: Technical – Integrate new technology

-  eLearning Library
-  Platform Operation Training
-  Platform Monitoring Training
-  Quarterly Technical “Hot Topic” Sessions*
-  Training & Certification Bundle
-  Implementation Readiness Assessment Tool
-  Implementation Readiness Assessment Review
-  Testing Strategy Best Practice Guide
-  Expert Led Testing Strategy Session
-  Online User Documentation

Deliver a premium experience to your customers

Ongoing Support – Operate and improve

-  Care Support
-  Expert Technical Go-live Engagement
-  Configuration Change Fulfillment Pack**
-  Genesys Knowledge Network
-  Genesys Product Roadmap
-  Feature Requests

Maximize Value – Monitor and optimize

-  Genesys Diagnostic Toolkit*
-  Interaction Routing Best Practice Guide
-  Platform Operations Best Practice Guide
-  Value Realization Advisory
-  **Platform Progression Review***
-  **Platform Foundation Health Review***

Note: The Guide offer for PureEngage comes with the Platform Progression Review or the Platform Foundation Health Review, but not both.

Level of Touch:



High



Medium



Low



Tool/Documentation

* On-premise only

** Cloud only

Set Strategy

CX Strategy Pack

PX_STG001

The Genesys CX Strategy Pack provides presentations, videos, and demos showing the power of Genesys in transforming the customer experience. The pack not only outlines the best practice visions of a world-class customer experience, it also articulates the benefits from operating this way.

What's included?

A set of materials available from the Genesys Knowledge Network depicting

- World-class CX vision
- Benefits to the bottom line
- Industry trends and best practices

Benefits

- Increase customer satisfaction with differentiated CX
- Increase customer engagement and retention
- Reduce cost through workload redirection
- Increase employee engagement through tools and knowledge

Financial Benefits Calculator

PX_STG002

The Financial Benefits Calculator is designed to empower you to enter your business data and see the financial results of improvements in real time.

What's included?

Templated tool to calculate the value of performance improvements to key business indicators (TCO, ROI, etc.)

Benefits

- Reduce effort by providing key business indicators and calculations based on best practices
- Increase accuracy of project and business benefit projections

Financial Benefits Calculator Review Session

PX_STG003

Enter your business data into the calculator and engage with an expert to interpret the data and results. Genesys financial consultants will share benefit benchmarks as well as best practice approaches to business case design during your review session.

What's included?

- Templated tool to calculate the value of performance improvements to key business indicators (TCO, ROI, etc.)
- Expert-led review of your results
 - Interpretation of data and results
 - Recommendations

Benefits

- Reduce effort by providing key business indicators and calculations based on best practices
- Increase accuracy of project and business benefit projections
- Expert engagement to answer questions and provide recommendations around business benefit calculation

Get Ready: Business

CX Masters Series

PX_RDY001

The CX Masters Series starts in Q1 of 2018 with the first installment on how Red Hat transformed their CX with intelligent routing and validated it with consolidated reporting. Learn how you can do the same!

These videos will become available on a quarterly basis for all customers free of charge and will serve as a reference for best practices, products and services, or becoming part of a Genesys community.

What's included?

- A quarterly release of interactive video courses highlighting common business scenarios or problems, featuring Genesys customers telling their CX story, supplemented by Genesys SMEs providing “what ifs” and best practices
- Branching questions that prompt learners to choose their paths to explore solutions by product, vertical, seat size, etc.
- Links to further education and training (GU), and engaging Genesys (SBC)

Benefits

- Increase CX know-how
- Increase awareness of CX decision effects
- Increase awareness of how CX transformation can achieve business goals

Change Management Guide

PX_RDY005

Preparing for change leads to a more seamless transition, and increased value realization. Job roles and responsibilities, internal processes, and skill development need to be evaluated. This set of materials helps you be prepared for your transformation.

What's included?

- Set of materials and best practices to help you understand the impact of change around CX transformation
- Key stakeholders
- Roles and responsibilities

Benefits

- Increase transformation clarity by aligning stakeholders
- Increase adoption through aligning vision across the enterprise
- Reduce risk by increasing awareness of impact of change
- Reduce effort and cost through well-defined roles and responsibilities eliminating duplication and rework
- Maximize value by aligning vision to strategic business outcomes

Change Management Coaching Session

PX_RDY006

Preparing for change leads to a more seamless transition and increased value realization. Job roles and responsibilities, internal processes, and skill development need to be evaluated. This expert-driven coaching session helps you to get ready for your transformation.

What's included?

- 4-hour expert-led webinar to walk through main topics of change management
- Set of materials and best practices to help you understand:
 - The impact of change around CX transformation
 - Identifying key stakeholders
 - Defining roles and responsibilities

Benefits

- Increase transformation clarity by aligning stakeholders
- Increase adoption through aligning vision across the enterprise
- Reduce risk by increasing awareness of impact of change
- Reduce effort and cost through well defined roles and responsibilities eliminating duplication and rework
- Maximize value by aligning vision to strategic business outcomes

Change Management Advisory

PX_RDY007

Preparing for change leads to a more seamless transition and increased value realization. Job roles and responsibilities, internal processes, and skill development need to be evaluated. This expert-led governance ensures that the project continues to focus on the original vision and desired business outcomes.

What's included?

- 12 hours of consultation spread across project stages:
 - Plan & Analyze
 - Requirements & Design
 - Build/Test
 - Deploy/Transition

- Change/Adoption Self Evaluation Review
- Best Practices and Recommendations

Benefits

- Increase transformation clarity by aligning stakeholders
- Increase adoption through aligning vision across the enterprise
- Reduce risk by increasing awareness of impact of change
- Reduce effort and cost through well defined roles and responsibilities eliminating duplication and rework
- Maximize value by aligning vision to strategic business outcomes

Organizational Readiness Self-Assessment

PX_RDY009

Preparing for change leads to a more seamless transition and increased value realization. Job roles and responsibilities, internal processes, and skill development need to be evaluated. This self-assessment tool will enable you measure your readiness for transformation.

What's included?

- Assessment tool to evaluate readiness for change in these areas:
 - Communication plans
 - Vision
 - Sponsorship
 - Training
- Compare your results against best practices
- Self-identify potential risk areas

Benefits

- Reduce risk by increasing awareness of impact of change
- Reduce effort and cost through well defined roles and responsibilities eliminating duplication and rework
- Maximize value by aligning vision to strategic business outcomes

Organizational Readiness Self-Assessment with Review

PX_RDY010

Preparing for change leads to a more seamless transition and increased value realization. Job roles and responsibilities, internal processes, and skill development need to be evaluated. This expert-led review of your self-assessment ensures that you understand your areas for potential risk and have recommendations to fill gaps.

What's included?

- Assessment tool to evaluate readiness for change in these areas:
 - Communication plans
 - Vision
 - Sponsorship
 - Training
- Expert engagement to help you compare your results to best practices and identify potential areas of risk

Benefits

- Reduce risk by increasing awareness of impact of change
- Reduce effort and cost through well defined roles and responsibilities eliminating duplication and rework
- Maximize value by aligning vision to strategic business outcomes

Get Ready: Technical

Implementation Readiness Assessment Tool

PX_RDY101

This package of best practice guides and self-assessment tools empowers you to map out your implementation planning from a people, process, and technology point of view.

What's included?

The self-assessment documentation walks through implementation needs:

- Implementation process guide
- IT & business roles required

- Customer-facing project activities
- Technology/architecture artifacts/diagrams
- Quality/monitoring processes/methodology
- Training/skill level requirements
- Troubleshooting, incident management

Implementation Readiness Assessment Review

PX_RDY102

Experienced experts will review your Implementation Readiness Assessment and provide recommendations on potential gaps and risk.

What's include?

- Implementation Readiness Assessment Tools (see PX_RDY102)
- 8-hour remote workshop (on-site as needed)
- One up-to-4 hour review of self-assessment
- One up-to-4 hour session to provide feedback on self-assessment

Benefits

- Reduce effort and duplication of work through clear definition of roles
- Reduce project timelines and cost through leveraging best practices and lessons learned to streamline key milestones and phases
- Reduce risk through better preparedness for go live and ongoing steady state of platform

Online User Documentation

PX_RDY103

The possibilities are vast for deploying and operating a customer experience, so it pays to know what an optimal operation looks like. The online user documentation library helps you increase your knowledge on running a premium CX platform with inputs from Genesys Professional Services.

What's included?

- Best Practices
- Whitepapers
- Product Manuals

Benefits

- Increase CX know-how with expert advice
- Increase self-sufficiency with enhanced CX administration skills
- Increase product stability and uptime
- Decrease Support cases

Testing Strategy Best Practice Guide

PX_RDY105

This guide provides you with lessons learned and best practices in establishing a quality testing strategy, identifying the critical resources that should be part of the testing process, and understanding different approaches to building comprehensive test cases.

What's included?

- Define what UAT means to your business
- The difference between system testing vs. Daily business operations
- Roles/responsibilities for creating a UAT plan
- Recommended Duration for UAT
- Environment requirement suggestions
- Link UAT back to business requirements/use cases
- How to build out the UAT test cases based on use cases

Benefits

- Risk mitigation
- Reduced downtime due to defects
- Minimize impact on customers due to system defects
- Ensure alignment of design and business outcomes and value

Expert Led Testing Strategy Review

PX_RDY106

Experts will review your plans and provide best practice recommendations to ensure you are prepared to move to the next environment successfully.

What's included?

- Expert engagement including:
- Remote workshop that includes:
 - Review and validation of business use cases and strategy
 - Feedback and recommendations
 - Test case alignment with business outcomes

Benefits

- Risk mitigation
- Reduce downtime due to defects
- Minimize impact on customers due to system defects
- Ensure alignment of design and business outcomes and value

Quarterly Technical “Hot Topic” Sessions

PX_RDY107

Genesys Technical Tutorials are developed in response to the issues that customers tell us are most important to them. These quarterly online webinars enrich your technical expertise on frequently reported problem areas.

What's included?

Quarterly webinar access on topics chosen as a result of customer surveys

Benefits

- Increase self-sufficiency through enriched technical expertise
- Increase awareness of CX trends

General Use and Troubleshooting eLearning Library

PX_RDY108

The General Use and Troubleshooting eLearning Library brings your staff up to speed on the important features and functionality required to successfully operate your contact center solution, and when they need a refresher, reviewing past lessons is only a few clicks away. The eLearning Library is free and accessible to all customers and partners.

What's included?

Unlimited access to our eLearning library that covers topics like:

- Understanding the software
- Using the interfaces
- Basic troubleshooting

Benefits

- Increase supervisor and agent efficiency
- Increase awareness of new features and functionality

Training and Certification Bundle

PX_RDY109

The Training and Certification Bundle is used to train your employees to attain a comprehensive understanding of your platform so that your employees have somewhere local to go before opening a case with Genesys.

What's included?

You receive 80 training units for employees to attend a Genesys University Foundational training course(s) and opportunity to achieve the corresponding certification for the course(s) taken.

Benefits

- Increase self-sufficiency by cultivating in-house subject matter experts
- Decrease Support cases

Platform Operation Training

PX_RDY110

Platform Operation Training provides training and documentation about performing moves, adds, changes, and deletes (MACDs) in your system.

What's included?

Documentation and eLearning on performing moves, adds, changes, and deletes (MACDs) as part of everyday administration

Benefits

- Increase self-sufficiency with enhanced CX administration skills
- Reduced interruption in service due to administration errors

Platform Monitoring Training

PX_RDY111

Platform Monitoring Training teaches you how set up and operate proper monitoring processes for a CX solution based on expert advice. Learn monitoring fundamentals with this instructor-led course.

What's included?

You receive two free registrations to the Genesys University GVP85-TS Troubleshooting Workshop. This three-day course, delivered both in the classroom and virtually, focuses on concepts and skills needed to troubleshoot the Genesys Voice Platform (GVP) in version 8. The course includes advanced deployment and troubleshooting topics: Call Recording and Call Progress Detection, Multi-Tenant, and Multi-Site GVP deployments.

Benefits

- Increase efficiency and stability
- Monitor risks
- Identify opportunities for optimization
- Reduce Support cases

Ongoing Support

Care Support

PX_ONG001

Genesys Care Support ensures professional 24/7 help with fast response times and easy accessibility. Know that when issues arise, Genesys is there waiting to help get you back to interacting with your customers.

What's included?

- 24/7 multichannel support
- Defined performance standards
- Online case management system
- Support for hardware purchased from Genesys
- Troubleshooting assistance with non-Genesys solutions
- Custom self-serve reporting
- Software updates and upgrades

Benefits

- Access to Genesys experts any time via multiple channels
- Decrease response, restoration, and resolution times
- Integrate case management, knowledge base, and community
- Single point of contact for help with software and hardware

Feature Requests

PX_ONG002

All customers and partners receive access to our Roadmap Feature Request tool for capturing your ideas, sharing them with others, and making a case for inclusion in our product development plans.

What's included?

- Single interface across products for feature requests
- Voting on features that appeal to your needs
- Visibility to other customer thoughts/voting on priority

Benefits

- Inclusion in CX development discussions
- Increase awareness of what peers are looking to accomplish

Genesys Product Roadmap

PX_ONG003

The Dynamic Product Roadmap offers users a view into emerging trends and the Genesys plan to meet the challenges of tomorrow.

What's included?

- Up-to-date information around the Genesys product roadmap
- Information around emerging trends in the CX space

Benefits

- Genesys strategic product direction can inform customer technology strategy and business prioritization.
- Reduce customer cycles around research and potential cycles of rework due to change in direction

Configuration Change Fulfillment Pack

PX_ONG004

The Configuration Change Fulfillment Pack addresses this by providing help performing moves, adds, changes, and deletes (MACDs) in the system. These personal engagements keep your system up-to-date amidst an ever-moving business climate.

What's included?

Delivery of basic moves, add, changes, and deletes (25 Changes)

Benefits

- Flexibility in resource utilization
- Increased access to expertise

Genesys Knowledge Network

PX_ONG005

You may not be aware of all of the resources available to support your Genesys investment, and most importantly, where to find them. To proactively support you, simplify your Genesys web experience, and ensure your success, the Knowledge Network provides a personalized, one-stop site for all web-based Genesys product-supporting information.

What's included?

One site that links to all product-supporting sites across product lines, including:

- Access to the Customer Care and GCAP portals
- Access to all documentation, training, community, developer, and status sites
- Personalized customizable dashboard
- Universal navigation
- SSO (single sign-on)

Benefits

- Rapid onboarding
- Easy access for product-supporting resources
- Increase self-sufficiency
- Reduce support costs

Expert Technical Go-live Engagement

PX_ONG010

The Expert Technical Go Live Engagement provides guidance around roadblocks, helps with onboarding, and familiarizes customers with all the resources Genesys has to offer. Personal Go-live Assistance comes standard with the Guide success offer to ensure a healthy start to a healthy journey.

What's included?

- 90-day TAM involvement: 30 days before and 60 days after go-live
- Handles final transition to Genesys Care

Benefits

- Increase efficiency of platform and ROI
- Decrease risk
- Orchestrate direct communication between internal organizations and Genesys

Maximize Value

Genesys Diagnostic Toolkit

PX_MAX001

The Genesys Genesys Diagnostic Toolkit is for assisting and quickly diagnosing issues with a Genesys solution. If remote access is enabled, a Customer Care Analyst can begin troubleshooting by capturing the necessary log files upon case initiation.

What's included?

Tools that provide:

- Alarms for in-house support teams or designated experts to promptly react to the detected anomaly
- Automatic routing to a Genesys care expert on Critical or major alarm to proactively open a case and work on a solution
- Mobile app that notifies of detected alarms

Benefits

- Increased visibility and awareness of platform issues or interruptions
- Reduce time to resolution and minimize interruption and impact to business operation

Value Realization Advisory

PX_MAX005

This session is designed to check in with customers throughout their journey to make sure that they are still on track with their initial vision and the outcomes they had projected. Expert resources will provide self-assessment tools and guidance to ensure you are maximizing the value of your Genesys platform.

What's included?

- 60 hrs of expert oversight and guidance provided in 2-hour webinar sessions throughout your journey
- Tools that include:
 - Self Discovery – what to look for based on best practices
 - Self Assessment – how your performance compares
- Training of internal resources on best practices to drive value

Benefits

Identify CX and operational gaps that could be impacting your key business indicators:

- Customer effort and satisfaction
- Efficiency and cost
- Revenue generation and customer retention

Platform Progression Review

PX_MAX007

The Platform Progression Review is an in-depth examination of your platform configuration followed by a detailed list of recommendations for tuning your system to its highest potential. Get a personalized blueprint for increased efficiency and stability from your routing setup and software installation.

Note: The Guide offer for PureEngage comes with the Platform Progression Review or the Platform Foundation Health Review, but not both.

What's included?

- Expert consulting – available once per year:
- Designed as a next step from the Platform Foundational Health Assessment
 - Platform upgrade assessment and provide recommendations
 - Routing Logic Review and recommendations

Benefits

- Simplify logic strategies, workflows, and rules
- Increase platform stability
- Mitigate risks associated with changes

- Decrease maintenance time and cost
- Increase consistency of the customer experience

Platform Foundation Health Review

PX_MAX008

The Platform Foundation Health Review is an in-depth examination of your platform health followed by a list of recommendations for tuning your system to its highest potential. Get a personalized blueprint for increased efficiency and stability from your monitoring, logging, and overall architecture.

Note: The Guide offer for PureEngage comes with the Platform Progression Review or the Platform Foundation Health Review, but not both.

What's included?

- Expert consulting – available once per year
- Review platform configuration for consistency and provide recommendations for optimization
- Log file management process review and recommendations
- Architecture and Topology Review
- Alarm and Monitoring Evaluation review and recommendations

Benefits

- Increase platform stability
- Increase awareness of system health with enhanced monitoring
- Decrease time with support due to enhanced logging
- Decrease maintenance time and cost
- Increase scalability and performance

Platform Operations Best Practice Guide

PX_MAX011

This collection of operational best practices comes from years of experience in the field. These best practices are the model for how the best customer experiences in the world run, day in and day out.

What's included?

- Incident and event management process
- Change management process
- Review roles/responsibilities (IT/Telephony)
- Troubleshooting process
- MACDs
- Reskilling
- Potential training opportunities

Benefits

- Reduce operational effort through best practice trouble shooting
- Increase platform stability and system availability through proper change management
- Reduce operational effort and staff stress by minimizing intra day skill changes

Interaction Routing Best Practice Guide

PX_MAX012

Connecting your customer interactions to the right resource is the foundation of customer engagement. Whether that resource is a human, a system, a bot, or a combination of all of these, connecting each customer interaction with the right resource at the right time is critical to minimizing cost and maximizing revenue.

What's included?

Comprehensive package that includes:

- Best practices for successful interaction routing
- What NOT to do
- Supportability tips (ability to create audit trail, reporting, etc.)

- Impact on WFM
- Omni-channel, blending tips

Benefits

- Reduce customer effort through improved engagement
- Increase customer satisfaction through more accurate connections
- Reduce operational effort of manually trying to meet demand through more intelligent targeting strategies