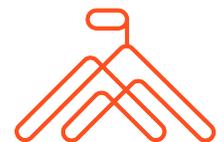
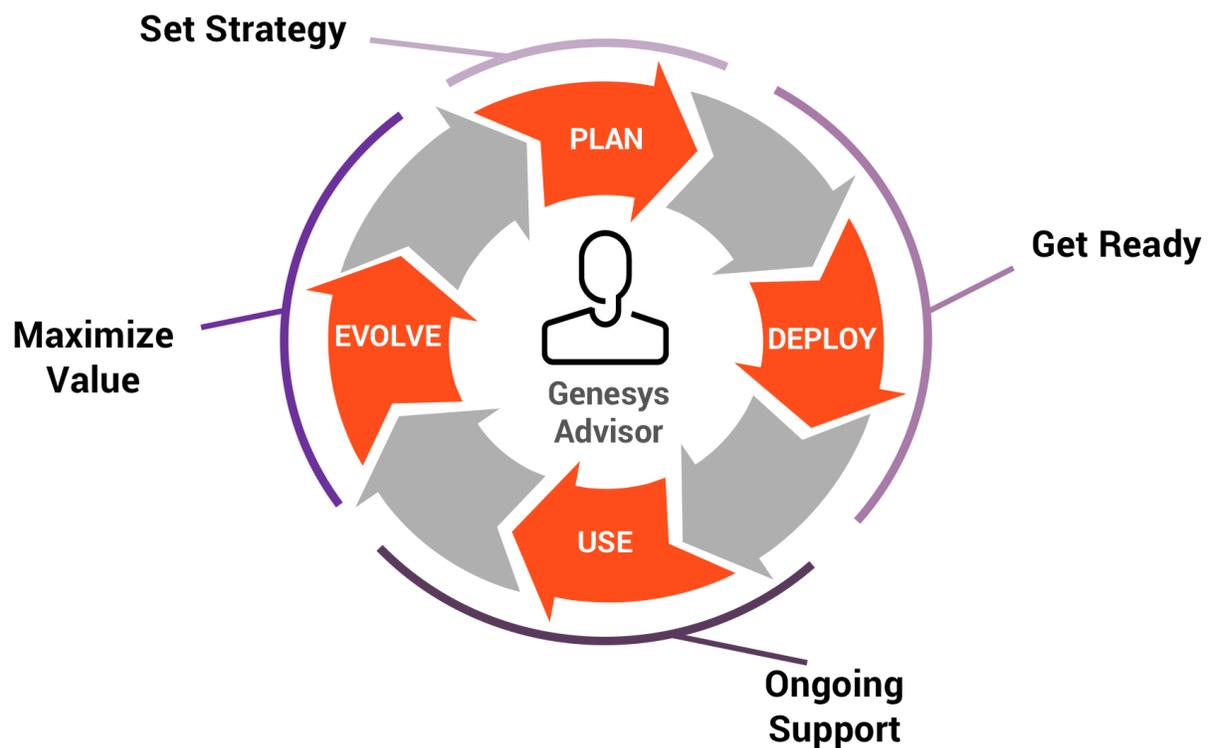


# PureSuccess **Equip** for PureConnect

## For those who like to do it themselves

PureSuccess Equip is the best fit for organizations with a highly developed framework for delivering experiences to their customers. These organizations require little help managing the change of their organization's processes, technology, and skills. Equip yourself with the tools, materials, and training to do what you want.



## Build a roadmap to success and prepare to go live

### Set Strategy – Establish vision and value

-  CX Strategy Pack
-  Financial Benefits Calculator

### Get Ready: Business – Integrate new skills

-  CX Masters Series
-  Organizational Readiness Self-Assessment
-  Change Management Guide

### Get Ready: Technical – Integrate new technology

-  eLearning Library
-  Platform Operation Training
-  Quarterly Technical “Hot Topic” Sessions\*
-  Implementation Readiness Assessment Tool
-  Training and Certification Bundle
-  Testing Strategy Best Practice Guide
-  Online User Documentation

## Deliver a premium experience to your customers

### Ongoing Support – Operate and improve

-  Care Support
-  Enhanced Go-live Support
-  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

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

## 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

## 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

## 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

### 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

## 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

## 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

## 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

## Enhanced Go-live Support

**PX\_ONG011**

Enhanced Go-live Support provides a guided tour of Genesys Care and all the resources Genesys has to offer. Enhanced Go-live Support comes standard with the Equip success offer to ensure a healthy start to a healthy journey.

**What's included?**

- Expert care to ensure a smooth go-live
- Introduction of Customer Care/TAM teams to end customer
- Transition to Genesys' Consumption Model
- Post go-live meeting to address any pending items

**Benefits**

- Increase confidence during go-live
- Decrease risk
- Increase communication quality between customer 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

## 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