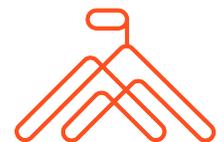
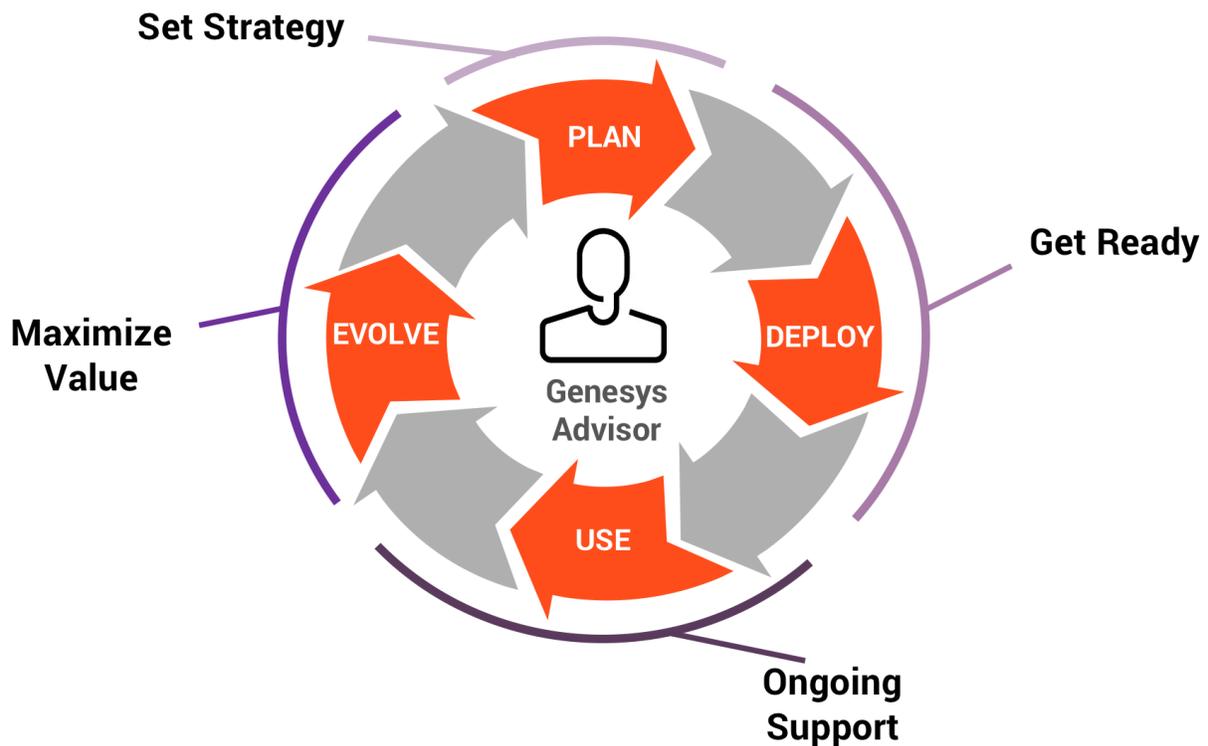


# PureSuccess Partner **Catalog** for PureEngage

For the flexibility to adapt to change

The PureSuccess Partner Catalog contains various types of assistance that can be purchased a la carte as you need them.



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

### Set Strategy – Establish vision and value

-  Financial Benefits Calculator Review Session
-  CX Transformation Advisory

### Get Ready: Technical – Integrate new technology

-  Training and Certification Bundle
-  Expert-led Testing Strategy Review
-  Implementation Readiness Assessment Review

### Get Ready: Business – Integrate new skills

-  Business and Performance Training (eLearning)
-  Business and Performance Training (ILT/VILT)
-  Change Management Coaching Session
-  Change Management Advisory
-  Change Management Consultation
-  Organizational Readiness Self-Assessment with Review
-  Organizational Readiness Assessment

## Deliver a premium experience to your customers

### Ongoing Support – Operate and improve

-  Configuration Change Fulfillment Pack\*\*
-  Support Architect\*
-  Genesys Guru Advisory Services\*
-  Enhanced Go-live Support
-  Partner Advisory Services

### Maximize Value – Monitor and optimize

-  Special Events Support
-  Seasonal Enhanced Support
-  Value Realization Advisory
-  Value Realization Service
-  Platform Foundation Health Review\*
-  Platform Health and Optimization Service\*
-  Expert Led Platform Operational Review
-  Voice User Experience Scorecard

Level of Touch:



High



Medium



Low



Tool/Documentation

\* On-premise only

\*\* Cloud only

## Set Strategy

### 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

### CX Transformation Advisory

#### PX\_STG004

This engagement provides a comprehensive consulting engagement that defines a tailored, executable roadmap supported by a financial business case to achieve the customer's unique business outcomes, as well as their customer experience and operational goals. The roadmap is designed to help customers make their strategy real showing tangible value along the way.

#### What's included?

- Prioritized roadmap of recommendations considering quick wins, strategic value, and foundational requirements
- Use cases to feed implementation design

- Reference architecture
- ROI/TCO analysis

**Benefits**

- Reduce effort and rework through clear articulation of vision and translation to technical solutions
- Comprehensive solution prioritized into consumable phases based on your desired outcomes. For example:
  - Increase customer satisfaction with differentiated CX
  - Increase customer engagement and retention
  - Reduce cost through workload redirection
  - Increase employee engagement through tools and knowledge

## Get Ready: Business

### Business and Performance Training (eLearning)

**PX\_RDY002**

The eLearning for CX Business Skills course teaches contact center supervisors techniques for going beyond the KPIs and managing the performance and workload of agents using a behavioral approach. Learn to drive better results from agents with this on-demand eLearning course.

**What's included?**

Library of eLearning:

- 4 modules on behavioral-based coaching
- 3 modules on workforce management

**Benefits**

- Increase agent effectiveness
- Increase supervisor effectiveness
- Reduce risk by preparing for the change ahead

## Business and Performance Training (ILT/VILT)

### PX\_RDY003

The Business and Performance Training (ILT/VILT) course teaches contact center supervisors techniques for going beyond the KPIs and managing the performance and workload of agents using a behavioral approach. This classroom course is taught by contact center experts and enhances the eLearning with agent labs and teach-back exercises.

#### What's included?

- On-site instructor-led training (maximum of 12 individuals per session) that teaches change management, best practices, call flows, continuous improvement processes, and disciplined floor management strategies with expert guidance and support through train-the-trainer (T3) consulting services
- Includes customized branded training curriculum to re-use in the future, delivered by your certified trainers

#### Benefits

- Increase agent effectiveness
- Increase supervisor effectiveness
- Reduce risk by preparing for the change ahead

## Organizational Readiness Assessment

### PX\_RDY004

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 engagement helps you prepare for your transformation.

#### What's included?

- Expert assistance that includes:
- Primer: Expert-led session on raising awareness and preparedness for the change that is coming
- Readiness: Evaluation of readiness for change
- Handover: Expert-led facilitation and smooth transition of recommendations to implementation and change management teams

## 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

## Change Management Consultation

### PX\_RDY008

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?**

- Expert assistance that includes:
  - Plan & Analyze
  - Requirements & Design
  - Build/Test
  - Deploy/Transition
- Expert-led evaluation of change/adoption after rollout
- Provide recommendations to sustain change and value

**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 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 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

### 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

## **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

## Ongoing Support

### 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

### 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

## Support Architect

### PX\_ONG012–015

The Support Architect is a personal concierge who takes you through in-depth examination of your routing setup and overall platform health followed by a list of recommendations for tuning your system to its highest potential.

This service includes everything in PX\_MAX009, Health and Optimization Engagement.

#### What's included?

Assigned Genesys expert with the following options:

- Platform Supportability and Maintainability
- Configuration Consistency and Optimization Review
- Architecture and Topology review
- Upgrade Advisory
- Routing Review
- System Trend Analysis, including High Call Volume day assessment that includes:
  - Component sizing evaluation and optimization
  - Outage support during business hours based on need
  - Post-incident analysis and risk mitigation plan
  - 3rd party software interoperability and integration points review
  - Compatibility review
  - Platform security recommendations

#### Engagement sizes

- PX\_ONG015 – 3 month engagement (choose 1 option)
- PX\_ONG014 – 6 month engagement (choose 2 options)
- PX\_ONG013 – 9 month engagement (choose 3 options)
- PX\_ONG012 – 12 month engagement (includes all)

#### Benefits

- Optimization of your environment
- Increase platform stability
- Reduce risk of business impact due to service interruption

## Genesys Guru Advisory Services

### PX\_ONG017

Guru Advisory Services deliver industry-leading business and operational expertise, best practices, and analytical insights to accelerate time-to-value and achieve operational cost savings and desired business performance. By reducing risk and pressure associated with the planning, analysis, and ongoing improvements of business processes and workforce performance, Genesys customers can focus on what matters most to their operations, workforce, and overall business of consistently delivering great customer experiences with engaged and motivated employees.

#### What's included?

- Mentoring, best practices, and business strategies, on-demand, using the WFO Assistance site
- Private personalized conversations with rapid turnaround times
- A searchable knowledge base of online conversations
- Real-time support (web-based meetings or calls) offered on an as-needed basis
- Monthly QBRs conducted with leadership that detail trends, usage, knowledge gaps, and resulting recommendations

#### Benefits

- Confidence to optimize Genesys PureEngage WFM software out-of-the-gate
- Realization of service goals and ROI
- Reduced operating costs

## Partner Advisory Services

### PX\_ONG019–022

Partner Advisory Services contain engagements with a Technical Account Manager who assists partners by identifying training and operational opportunities, best practices, and case trend analysis. This advisor will facilitate and prescribe new skills development and generally introduce you to Genesys tools and methodologies.

**What's included?**

Engagements of Technical Account Manager assistance that include:

- Introduction of the partner to the Customer Care team and to procedures for case management, escalations, and so on
- Reports containing case trend analysis, best practices, training and operational opportunities, open action items
- Weekly status review call to review open cases and support statistics for the week

**Engagement size**

- PX\_ONG019 – 12-month engagement
- PX\_ONG020 – 9-month engagement
- PX\_ONG021 – 6-month engagement
- PX\_ONG022 – 3-month engagement

**Benefits**

- Increase efficiency
- Decrease risk
- Increase communication quality between the partner and Genesys

## Maximize Value

### Special Events Support

**PX\_MAX002**

Special Events Support provides short-term assistance for events that involve changes in the system and require Genesys to be actively involved working with the customer as they complete the event.

**What's included?**

- Planning session prior to change
- Learn the customer environment and expectations of the event
- Evaluate potential weak points
- Develop recommendations on how to operate during the event

- Monitoring and checkpoints during change
- Checkpoint post change – review overall status post event and complete transition to normal operation

#### **Benefits**

- Reduce effort associated with change preparation
- Reduce Risk
- Increase support levels during change

## Seasonal Enhanced Support

### **PX\_MAX003**

Seasonal Enhanced Support provides short-term assistance for events that are not technical in nature and require Genesys to be on high alert to solve issues and mitigate risk.

#### **What's included?**

- Genesys expert assigned for a one-month period
- Pre-seasonal event planning sessions
  - Outline event, Business Outcomes & Projected volume
  - Support model planning and review
  - Recommendations on planning and operations
- Readiness checkpoints prior to event
  - Alignment calls with key resources
- Enhanced support during the event
  - Calls and updates
- Post-event checkpoint
  - Transition to normal operation

#### **Benefits**

- Risk mitigation during sizable seasonal events
- Available resource who knows your environment and situation

## Expert Led Platform Operational Review

### PX\_MAX004

Experienced experts will review your process and provide recommendations around areas for improvement based on global best practices.

#### What's included?

- Review overall process, review goals for engagement, and discuss roles/responsibility change management process
- Expert shadows IT/Telephony/Admin users and operations onsite and provides assessment of findings summarizing following of best practices, areas of improvement/efficiencies, opportunities for automation, configuration optimization
- Readout of findings, recommendations, and areas for improvement

#### Benefits

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

## 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

## Value Realization Service

### PX\_MAX006

This engagement provides expert resources to validate initial business drivers, assess the current environment, and collect data points. The team then analyzes the information and provides recommendations for maximizing value.

#### What's included?

- 120 hrs of expert oversight and guidance provided through onsite and remote sessions
- Onsite session for data gathering and current state discovery
- Onsite presentation of findings, recommendations, and roadmap to maximize 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 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 Health and Optimization Service

**PX\_MAX009**

The Platform Health and Optimization Service is an in-depth examination of your routing setup and overall platform health followed by a list of recommendations for tuning your system to its highest potential.

This service bundles the Platform Progression Review and the Platform Foundation Health Review together (PX\_MAX007 & PX\_MAX008).

**What's included?**

- Expert guidance and consulting
- Review and optimization of:
  - Routing logic
  - Configuration
  - Log management and configuration
  - Architecture and Topology
  - Monitoring and Alarms

## Benefits

- Increase awareness and overall system health
- Increase stability in platform
- Prevent & reduce business impacts due to service interruptions

## Voice User Experience Scorecard

### PX\_MAX013

The Voice User Experience Scorecard offers a scheduled review of the customer's speech IVR with a focus on customer experience. A scorecard will provide scoring against the Genesys Caller Bill of Rights best practices along with insights from the evaluator.

### What's included?

Eight hours of remote engagement

- One up-to-7 hour review of speech IVR
- One up-to-1 hour session to present Caller Bill of Rights scorecard
- Gives an at-a-glance overview of current speech IVR
- Scores different design characteristics based on best practices
- Helps to focus future improvement opportunities by identifying areas of improvement

### Benefits

- Increase awareness of IVR performance against best practices
- Help focus future improvements on known weak points
- Realize full potential of the customer experience within the IVR