TOGETHER

CX17

INDY • MAY 22-25, 2017

Genesys

Genesys + Salesforce = Amazing Customer Experiences

Kimlan Do, PureEngage Product Management

Cindy Herrington, PureConnect Product Management

Randolph Rife, PureCloud Product Management

THE BEST OF BOTH WORLDS

THE WORLD'S LEADING CRM AND THE WORLD'S LEADING OMNICHANNEL ENGAGEMENT ENGINE INTEGRATED FOR COMPLETE CUSTOMER LIFECYCLE MANAGEMENT AND INNOVATION IN CUSTOMER EXPERIENCE.

- DEEPEST INTEGRATION OF ANY VENDOR
- LEVERAGING CUSTOMERS' EXISTING INVESTMENTS
- TO SHARE DATA AND CONTEXT SEAMLESSLY
- ACROSS MARKETING, SALES, SERVICE
- BLENDING SELF AND ASSISTED SERVICE
- WITH CENTRALIZED REPORTING + WORKFORCE OPTIMIZATION

CATEGORY LEADERSHIP FOR 9 YEARS RUNNING

Genesys

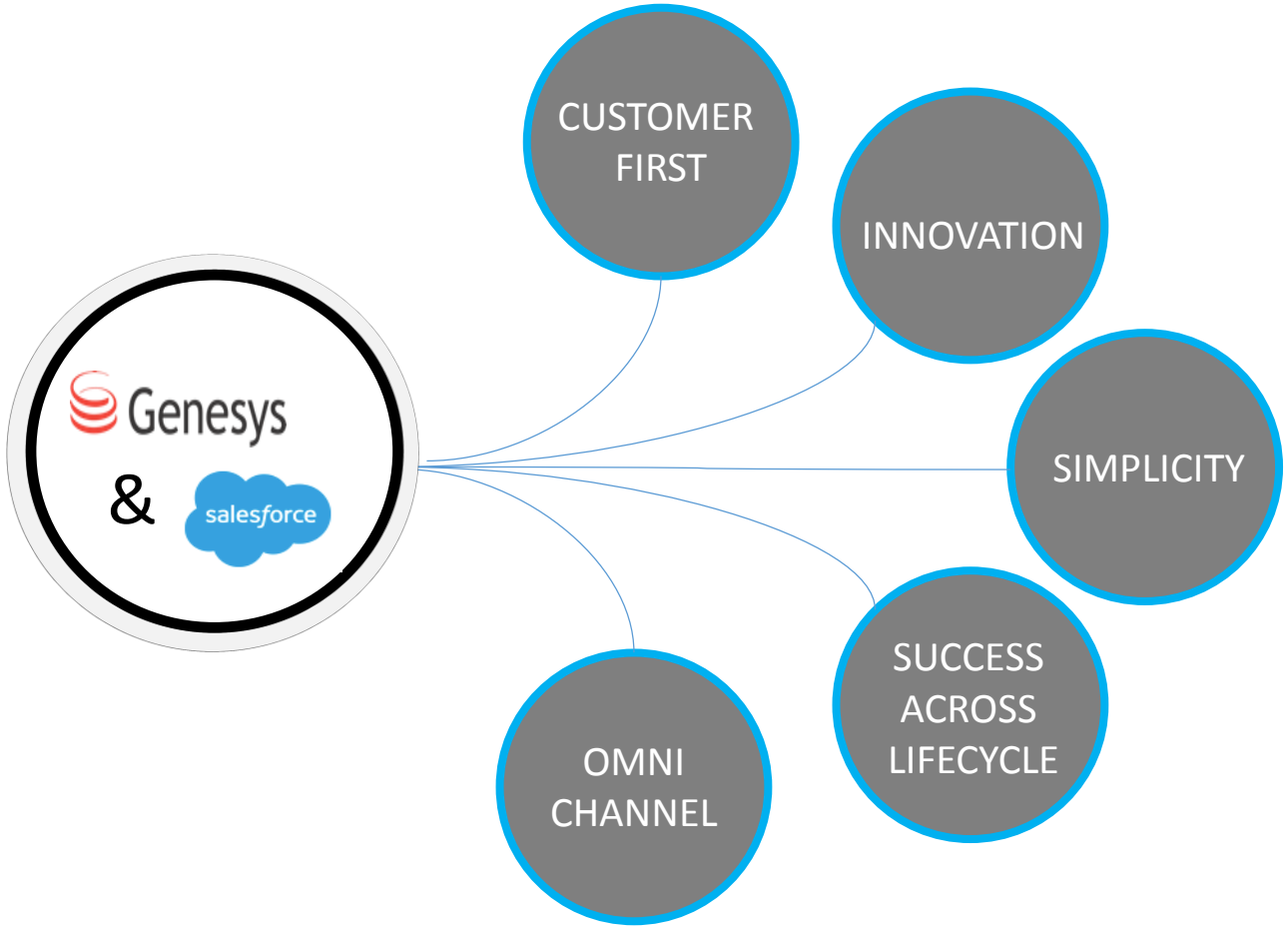
Figure 1. Magic Quadrant for Contact Center Infrastructure, Worldwide

Source: Gartner (May 2017)

salesforce service cloud

2017 Magic Quadrant for the CRM Customer Engagement Center

GUIDING PRINCIPLES



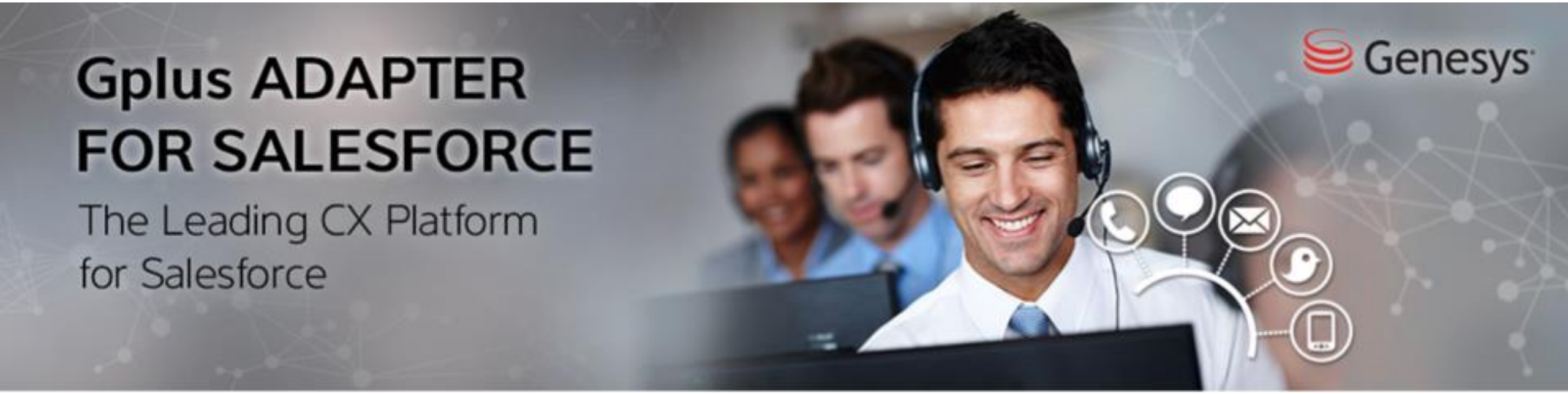
PureEngage

Gplus Adapter for Salesforce

PureEngage

Only true omnichannel customer engagement suite for global businesses to deliver competitively superior experiences -- providing real-time contextual journeys, world-class orchestrated routing, and digital transformation at any scale.

Salesforce App Exchange Listing



https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B5l6REAR

Key Capabilities for Gplus Adapter

AUTOMATED RECORD DISPLAY & ACTIVITY UPDATE

- Screen pops of Salesforce records using caller ID or attached data
- Multiple records displayed at same time
- Activity record created at conclusion of interaction

EMBEDDED USER INTERFACE

- Embedded media control within Salesforce user interface
- Select phone field from record and dial out directly through Genesys CX Platform

EASE OF ROUTING AND IMPLEMENTATION

- Real-time orchestration, assigning interactions to the best available contact center agents
- 100% thin client architecture

Key Capabilities for Gplus Adapter

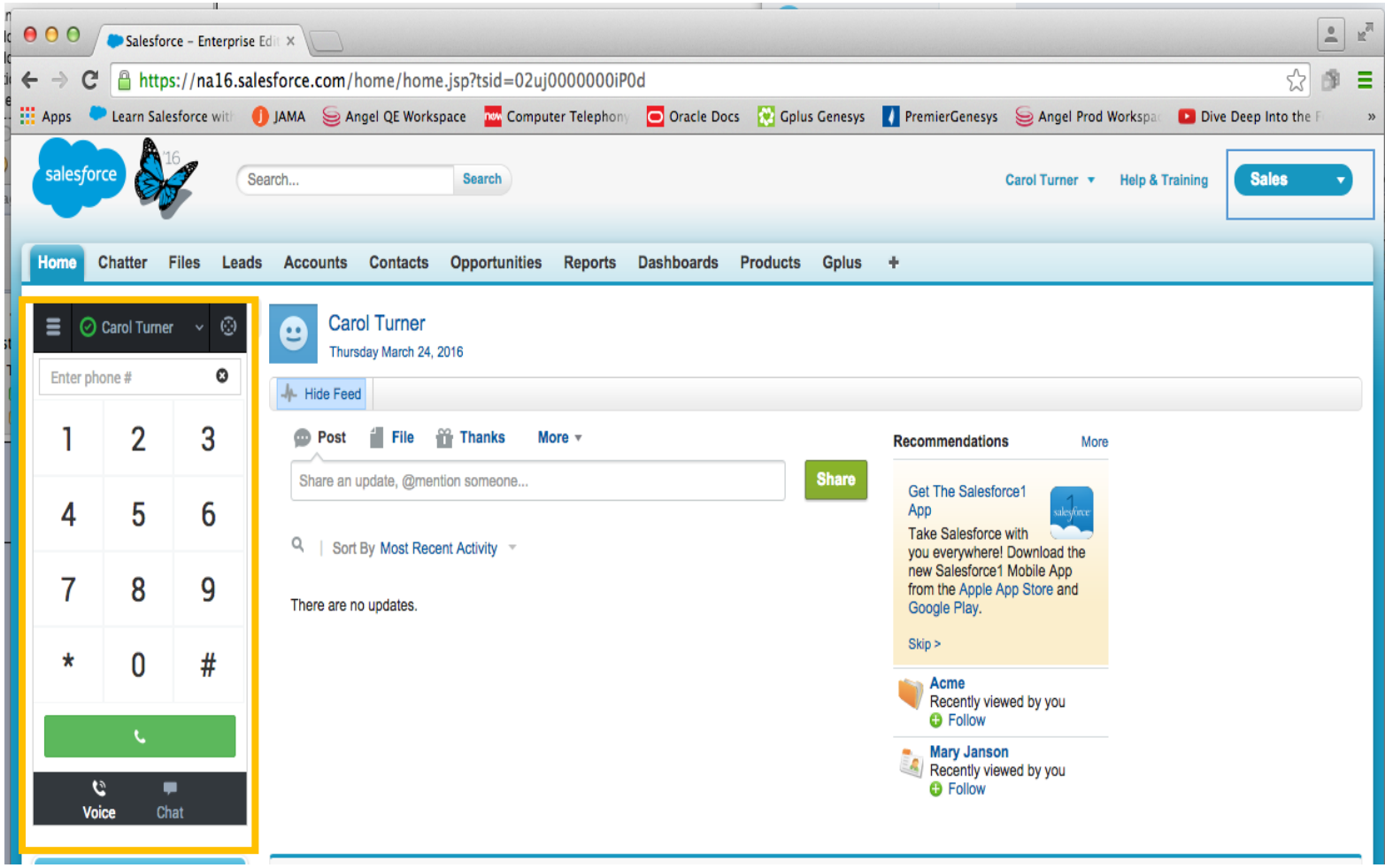
Inbound or Outbound Voice	• Voice call controls for inbound calls • Outbound Campaign in Progressive, Predictive and Pull Preview Modes • Free Seating, SIP Voicemail Support
Chat or Email	• Support Workspace Web features for Genesys Chat and Email • Knowledge and Standard Responses
Supervisor Features	• Supervision modes for voice and chat include silent monitoring, coach and barge-in • All calls or only current call

CURRENTLY AVAILABLE GENESYS PURE ENGAGE INTEGRATION OPTIONS TO SFDC

	GPLUS ADAPTER FOR SALESFORCE	GPLUS ADAPTER FOR SALESFORCE WORKSPACE WEB EDITION	PLUG-IN FOR WORKSPACE DESKTOP EDITION
AVAILABILITY	GENERALLY AVAILABLE PRODUCT – CLOUD CONDITIONAL - PREMISE	GENERALLY AVAILABLE PRODUCT – CLOUD CONDITIONAL - PREMISE	PS ASSET – BEST SUITED FOR EXISTING WDE CUSTOMERS PREMISE ONLY
EMBEDDED IN SALESFORCE	X	X	
REQUIRED WORKSPACE LICENSE		X	X
SCREEN POP	X	X	X
CLICK TO DIAL	X	X	X
ACTIVITY TRACKING	X	X	X
SUPPORT SALESFORCE CLASSIC MODE	X		X
SUPPORT SALESFORCE CONSOLE MODE	X	X	X
INBOUND VOICE (INCL. TEAM COMMUNICATOR, VOICE CONFERENCING AND CONSULTATION)	X	X	X
OUTBOUND VOICE		X	X
CHAT	X (WITHOUT STANDARD RESPONSES)	X	X
EMAIL		X	X
SOCIAL MEDIA			X
SMS			X
WORKLOAD MANAGEMENT			X
KNOWLEDGE MANAGEMENT		X	X
SIP BUSINESS CONTINUITY			X

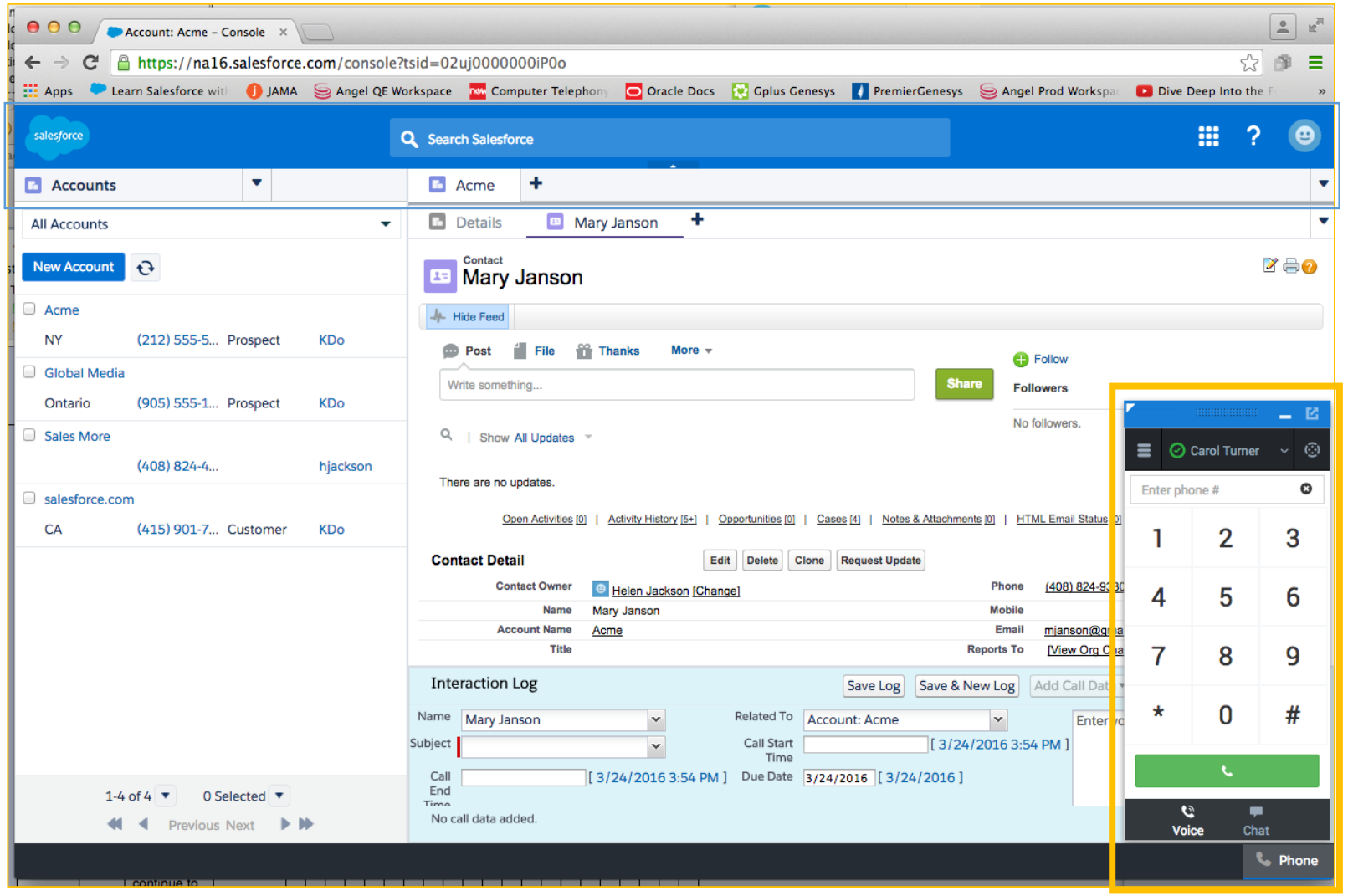
Option 1: Gplus in Salesforce Classic Mode

- Salesforce Classic Mode
  - Inbound Voice
  - Chat without standard responses
- Sized fixed at 400x200 (Salesforce limitation)
- Available for Pure Engage Cloud and Premise



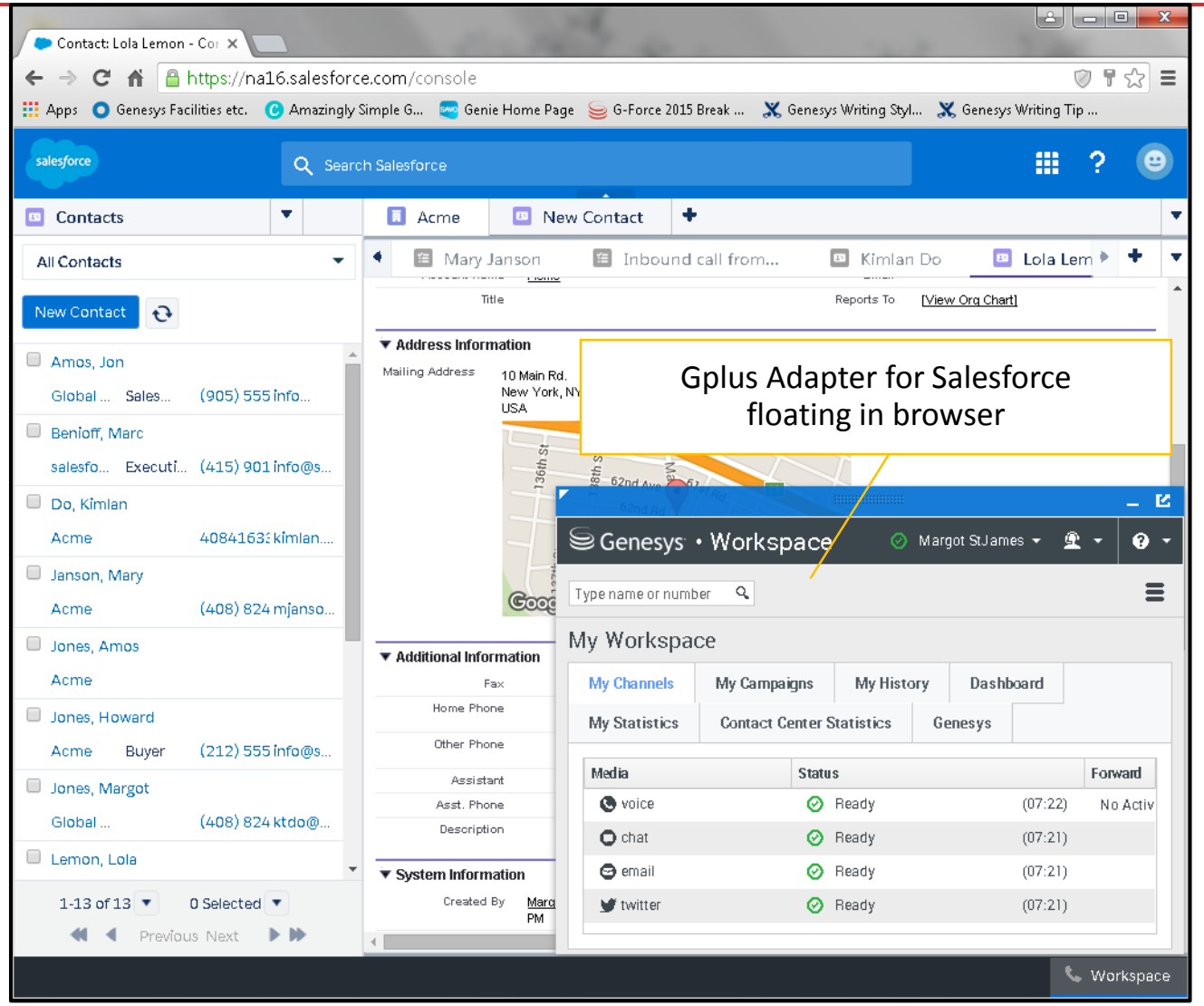
Option 2: Gplus in Salesforce Console Mode

- Salesforce in Console Mode
  - Inbound Voice
  - Chat without standard responses
- Sized fixed at 400x200 (windows is resizable – but adapter is not)
  - Moveable and popout of browser
- Available for Pure Engage Cloud and Premise

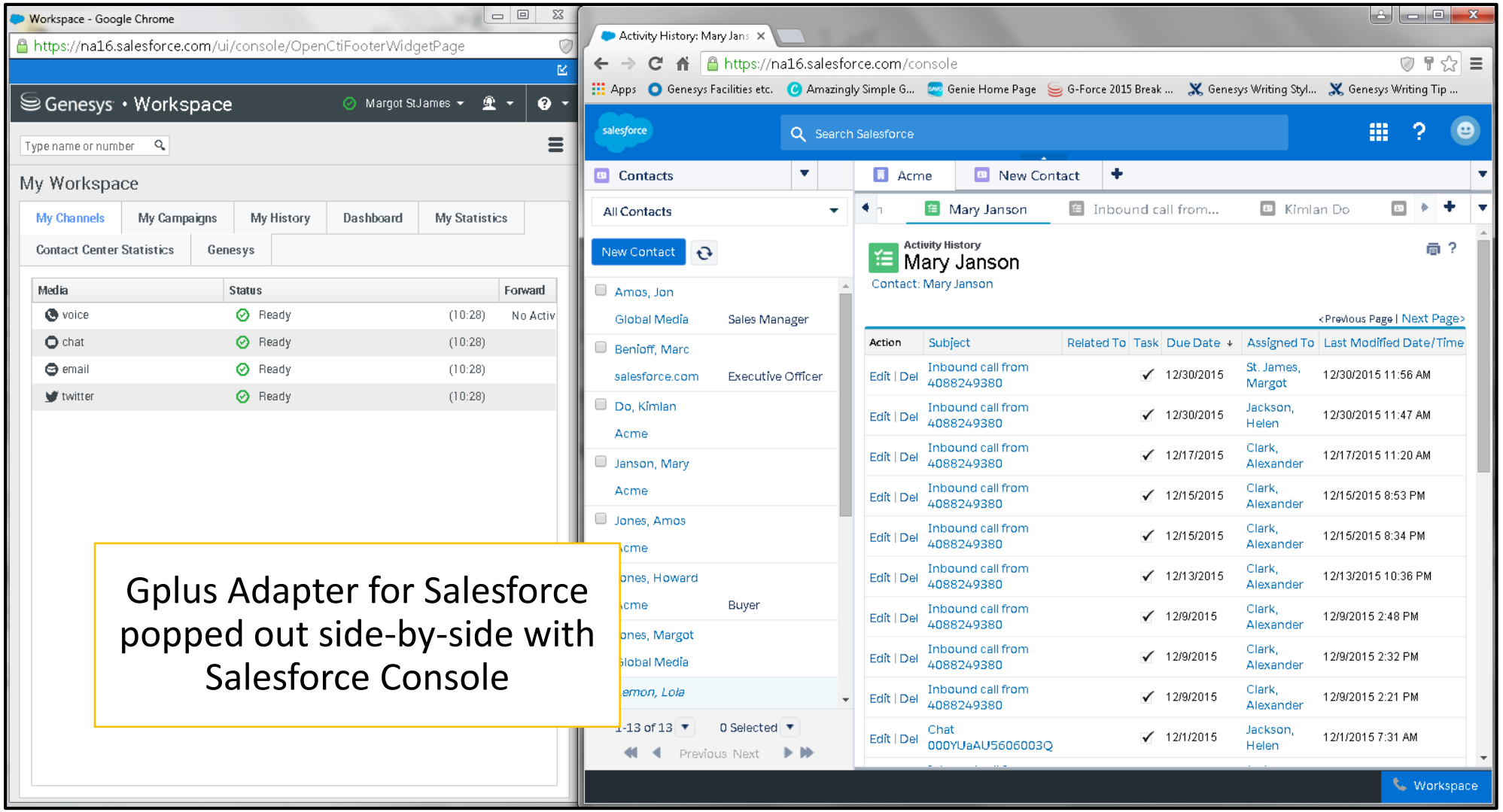


Option 3 – Gplus with Workspace Web in Salesforce Console Mode

- Salesforce in Console Mode **ONLY**
  - Inbound/Outbound Voice
  - Chat
  - Email
- Movable/Resizable/Popout to separate windows
- Available for Pure Engage Cloud and Premise



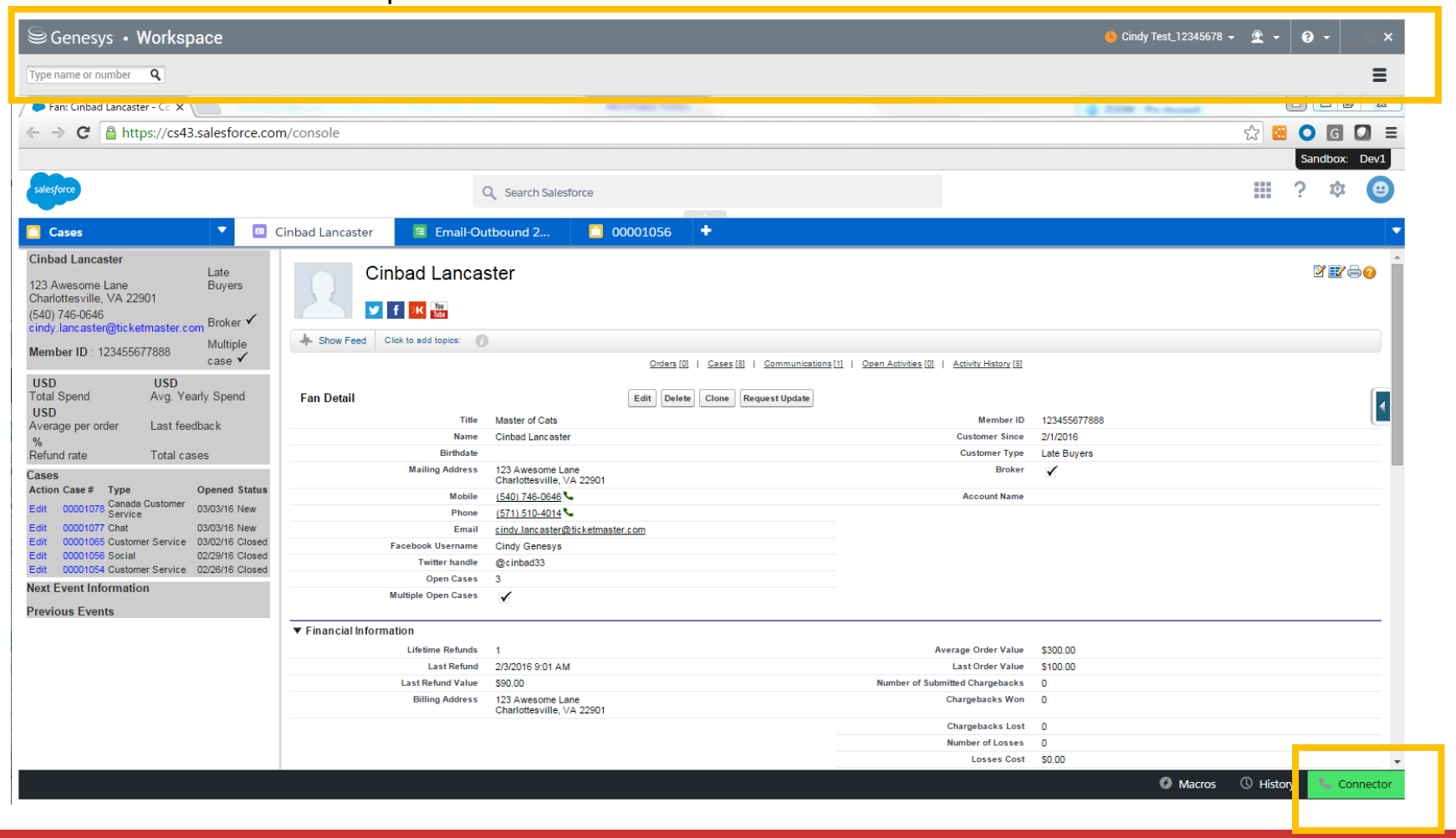
Option 3 – Gplus with Workspace Web in Salesforce Console Mode



Gplus Adapter for Salesforce popped out side-by-side with Salesforce Console

Option 4: Workspace Desktop Edition (WDE)

- <u>Existing Genesys Customer</u>
  - Connector as PS Asset to provide integration to Salesforce
  - WDE is minimized at the top of the screen



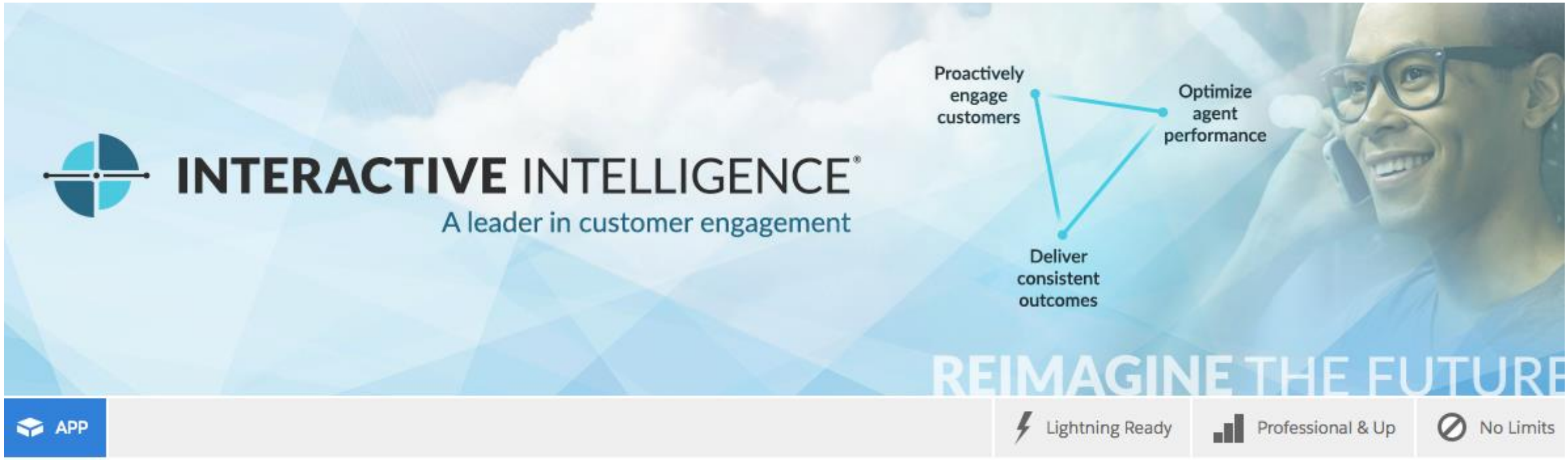
PureConnect

PureConnect for Salesforce

PureConnect

A proven all-in-one multichannel engagement offer that is rapid to deploy, simple to administer, flexible, tailorable and cost-effective for mid-size to large organizations.

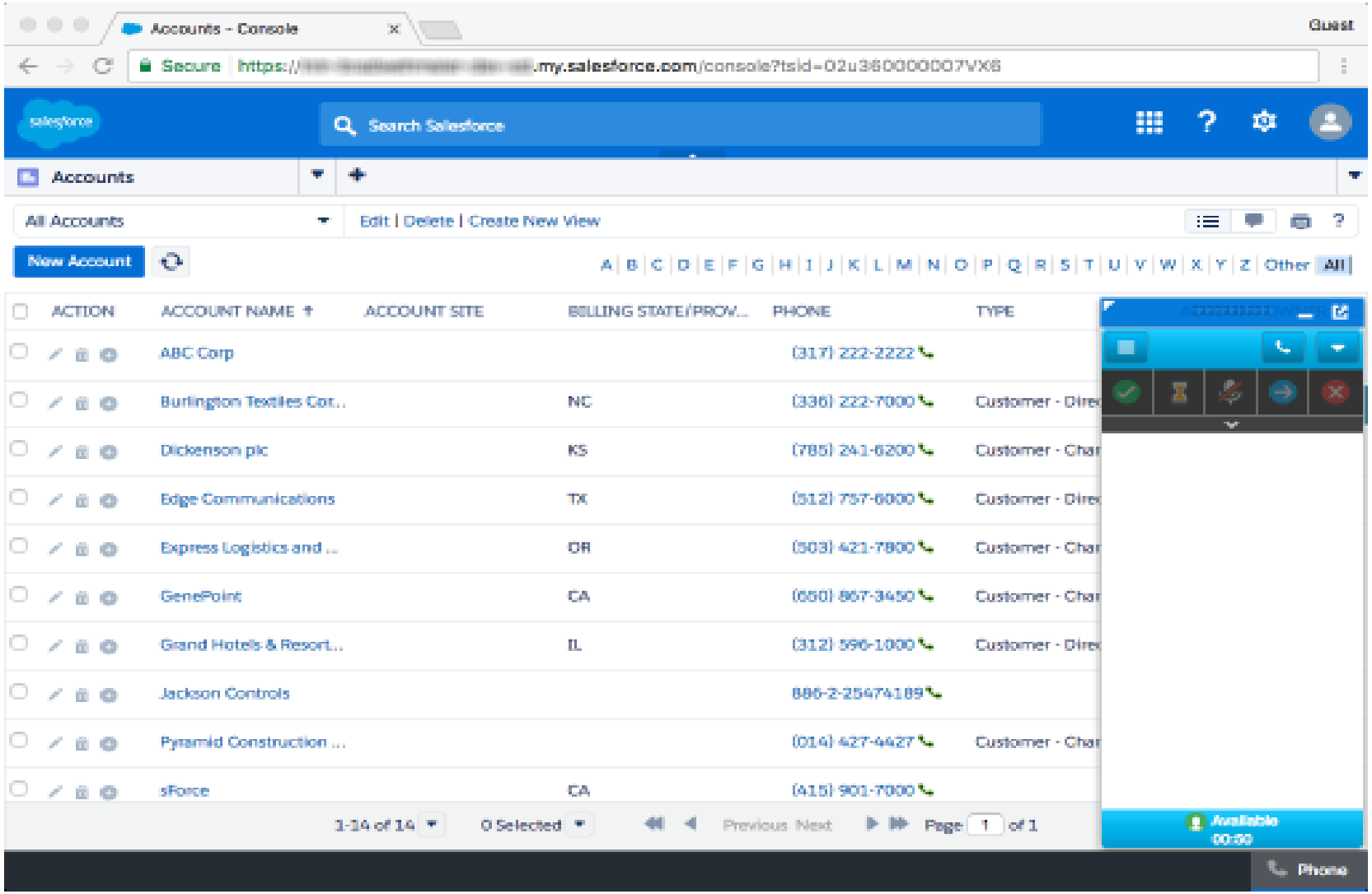
Salesforce App Exchange Listing



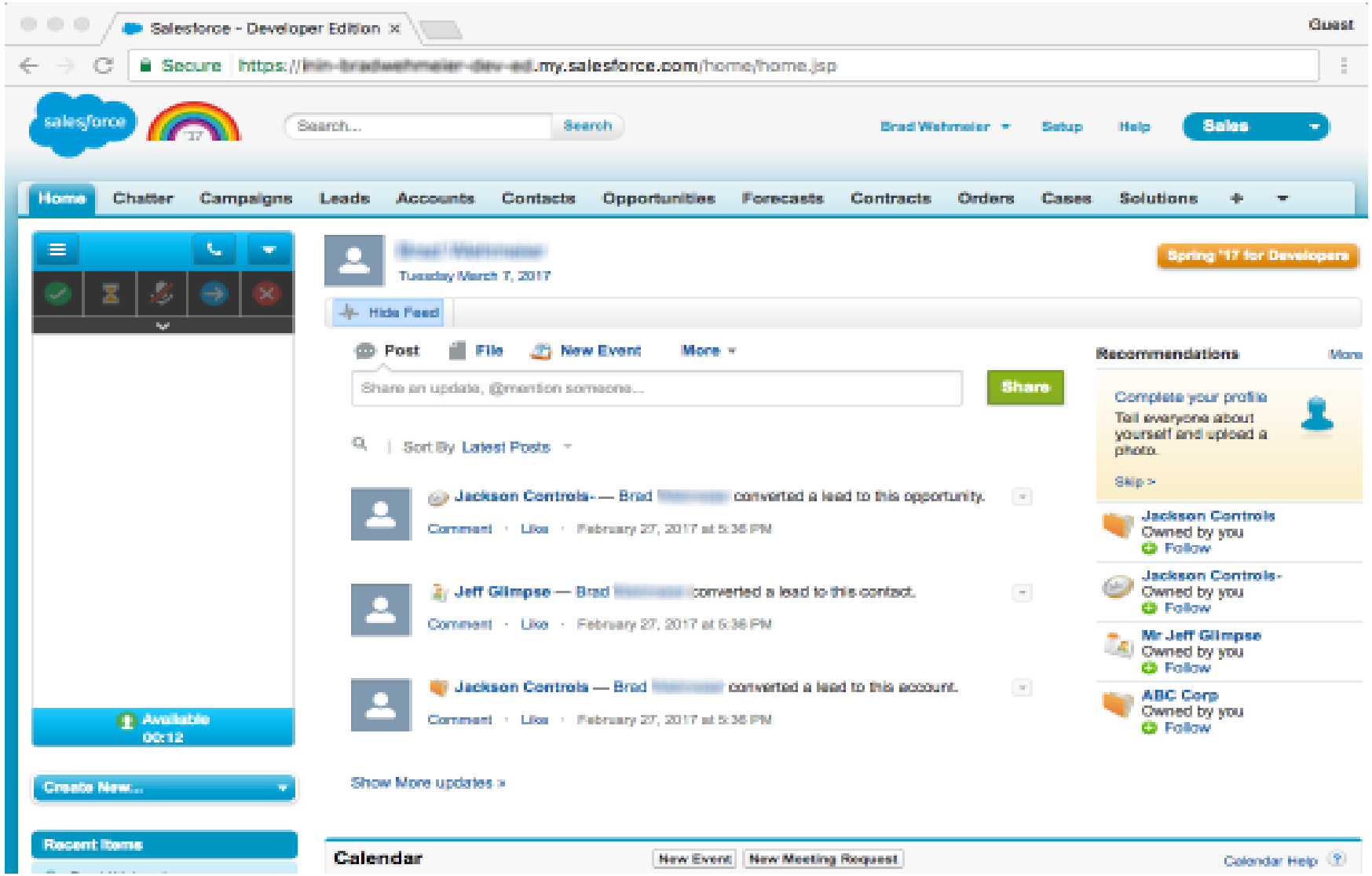
Interactive Intelligence | Genesys: CIC for Salesforce®

https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000DTrmQEAT

Service Console mode

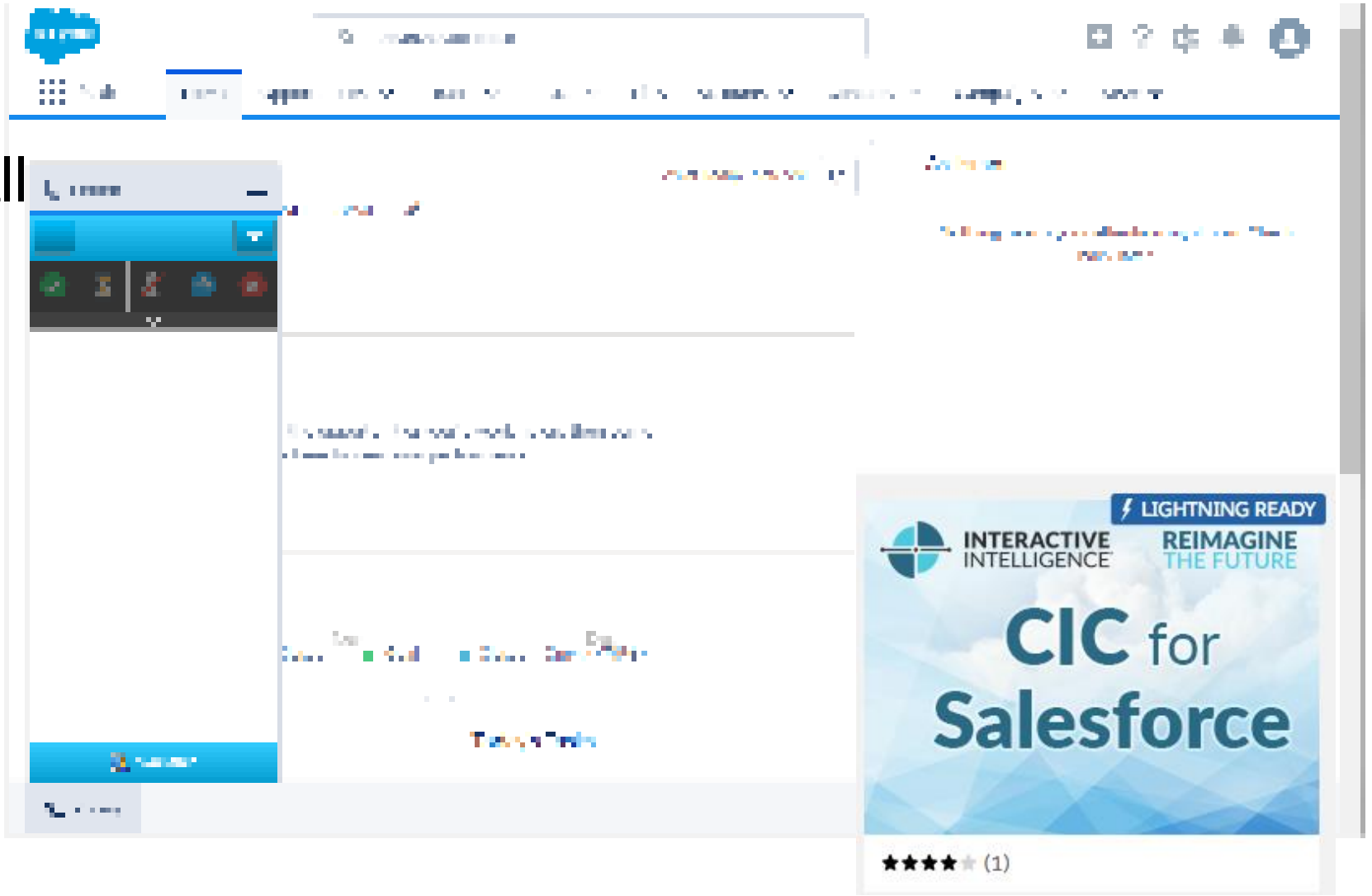


Sales mode

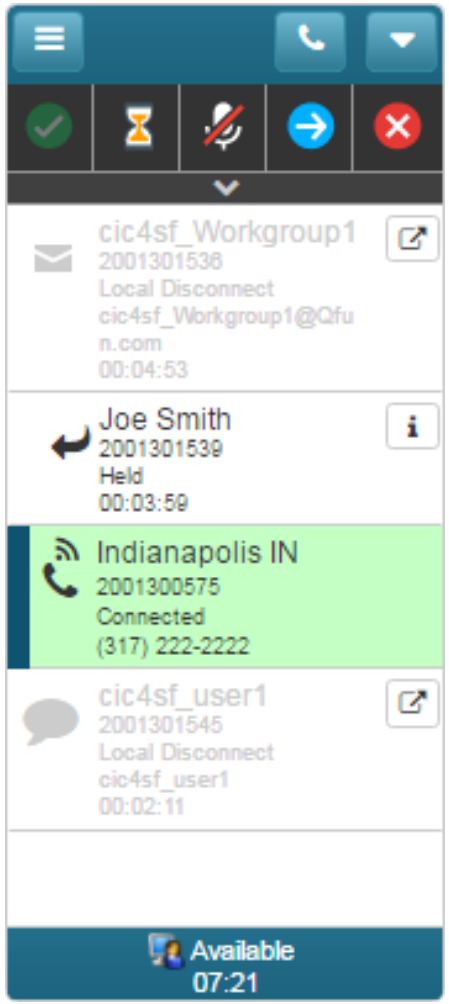

Salesforce - Developer Edition
Guest
Secure
https://[redacted].my.salesforce.com/home/home.jsp
salesforce
Search...
Search
Brad Wehmeier
Setup
Help
Sales
Home
Chatter
Campaigns
Leads
Accounts
Contacts
Opportunities
Forecasts
Contracts
Orders
Cases
Solutions
Tuesday March 7, 2017
Spring '17 for Developers
Hide Feed
Post
File
New Event
More
Share an update, @mention someone...
Share
Sort By Latest Posts
Jackson Controls- — Brad converted a lead to this opportunity.
Comment · Like · February 27, 2017 at 5:36 PM
Jeff Glimpse — Brad converted a lead to this contact.
Comment · Like · February 27, 2017 at 5:36 PM
Jackson Controls — Brad converted a lead to this account.
Comment · Like · February 27, 2017 at 5:36 PM
Show More updates »
Recommendations
More
Complete your profile
Tell everyone about yourself and upload a photo.
Skip >
Jackson Controls
Owned by you
Follow
Jackson Controls-
Owned by you
Follow
Mr Jeff Glimpse
Owned by you
Follow
ABC Corp
Owned by you
Follow
Available
00:12
Create New...
Recent Items
Calendar
New Event
New Meeting Request
Calendar Help

Lightning Experience

- Released April 4th
- Adds new Lightning Call Center
- Eliminates page refreshes seen in Classic mode
- No more extra load on server or off site session managers

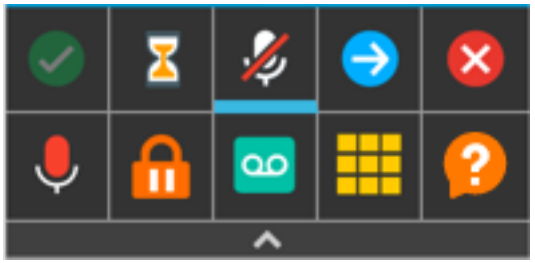


Optimized Agent Interface

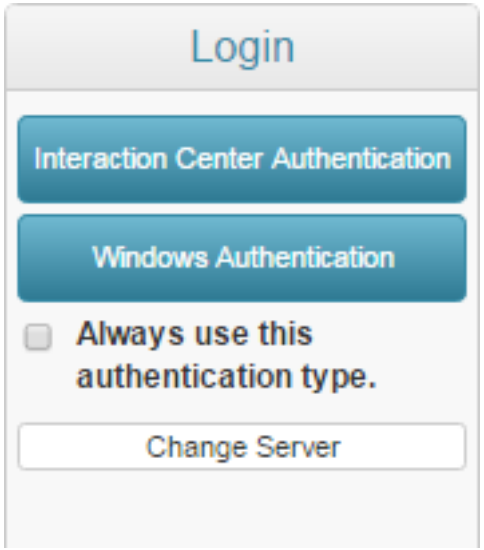


Voice, callback, chat, email, generic objects, email to case objects

Interaction controls

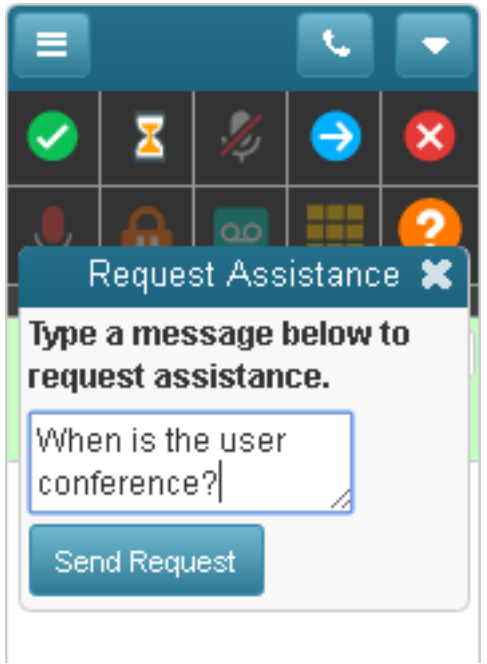


Record
Secure Pause
DTMF, etc.

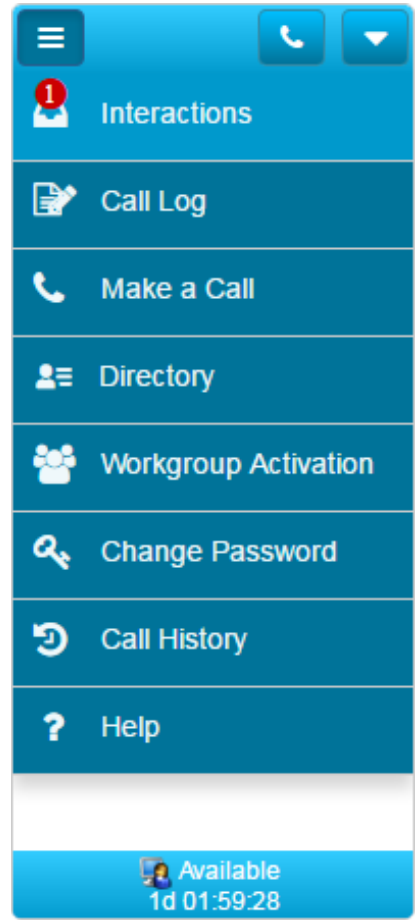


Single Sign-on

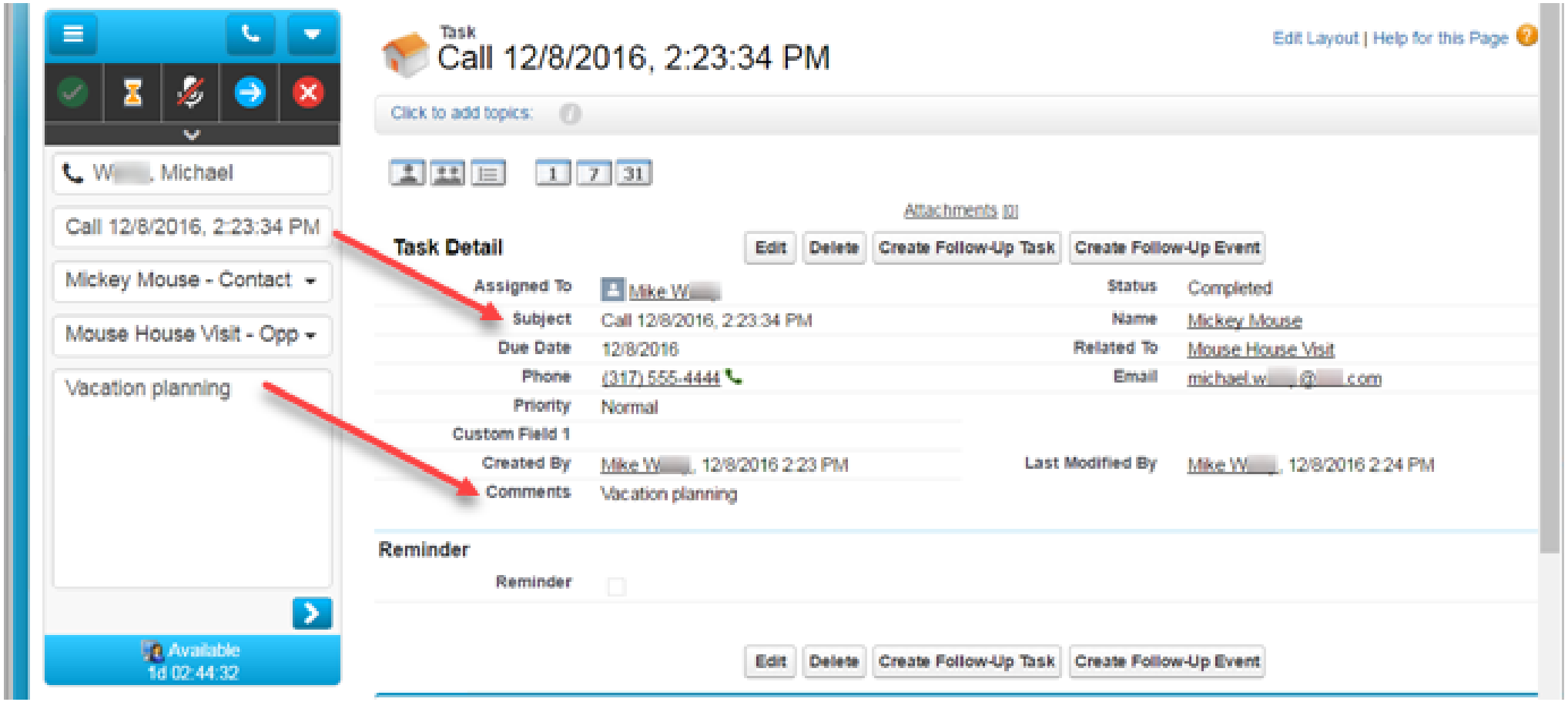
Request assistance



Workgroup activation

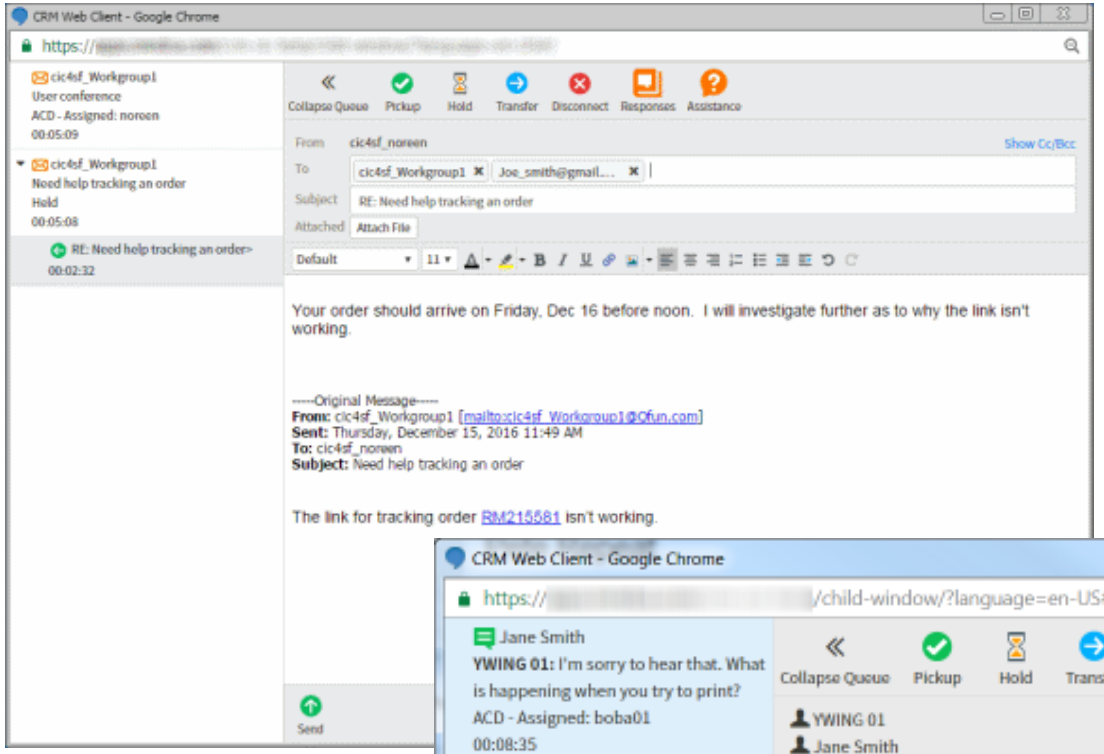


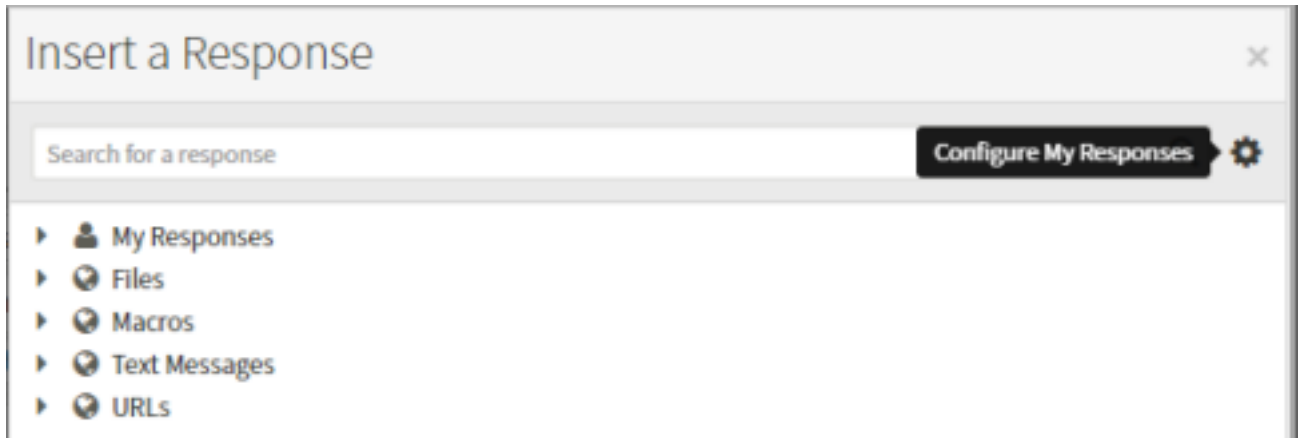
Call logging

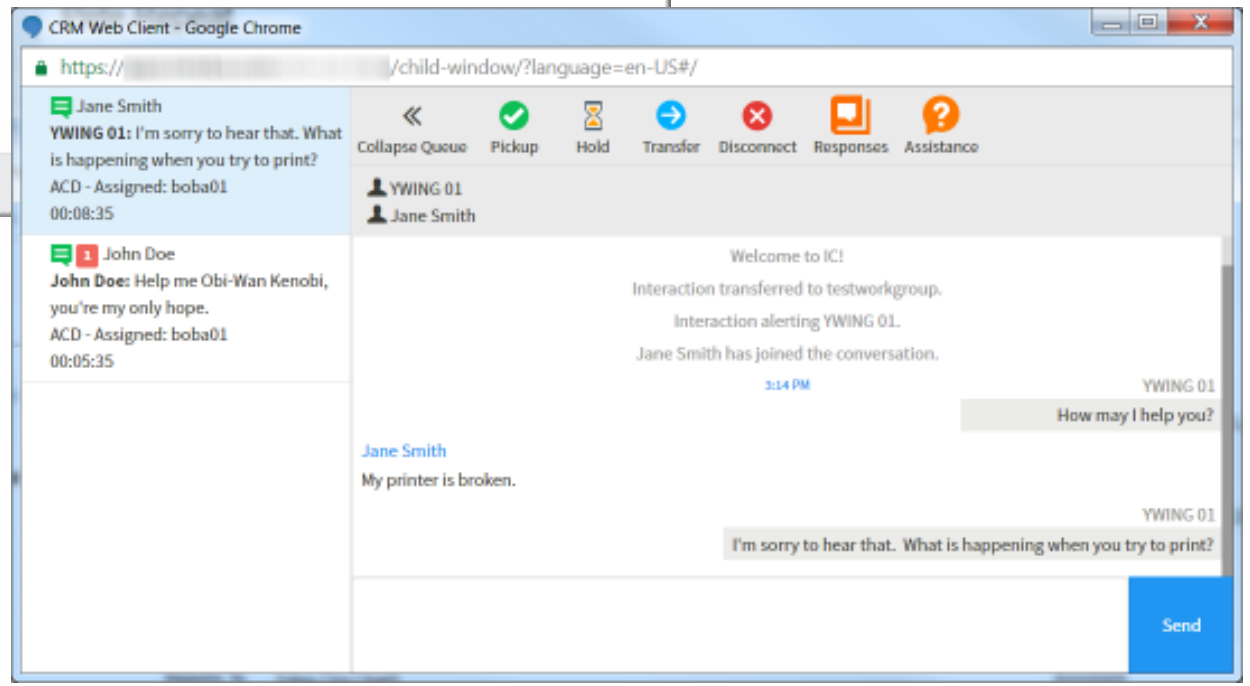


Call details and agent comments in Salesforce activity history

Email and Chat Response Management





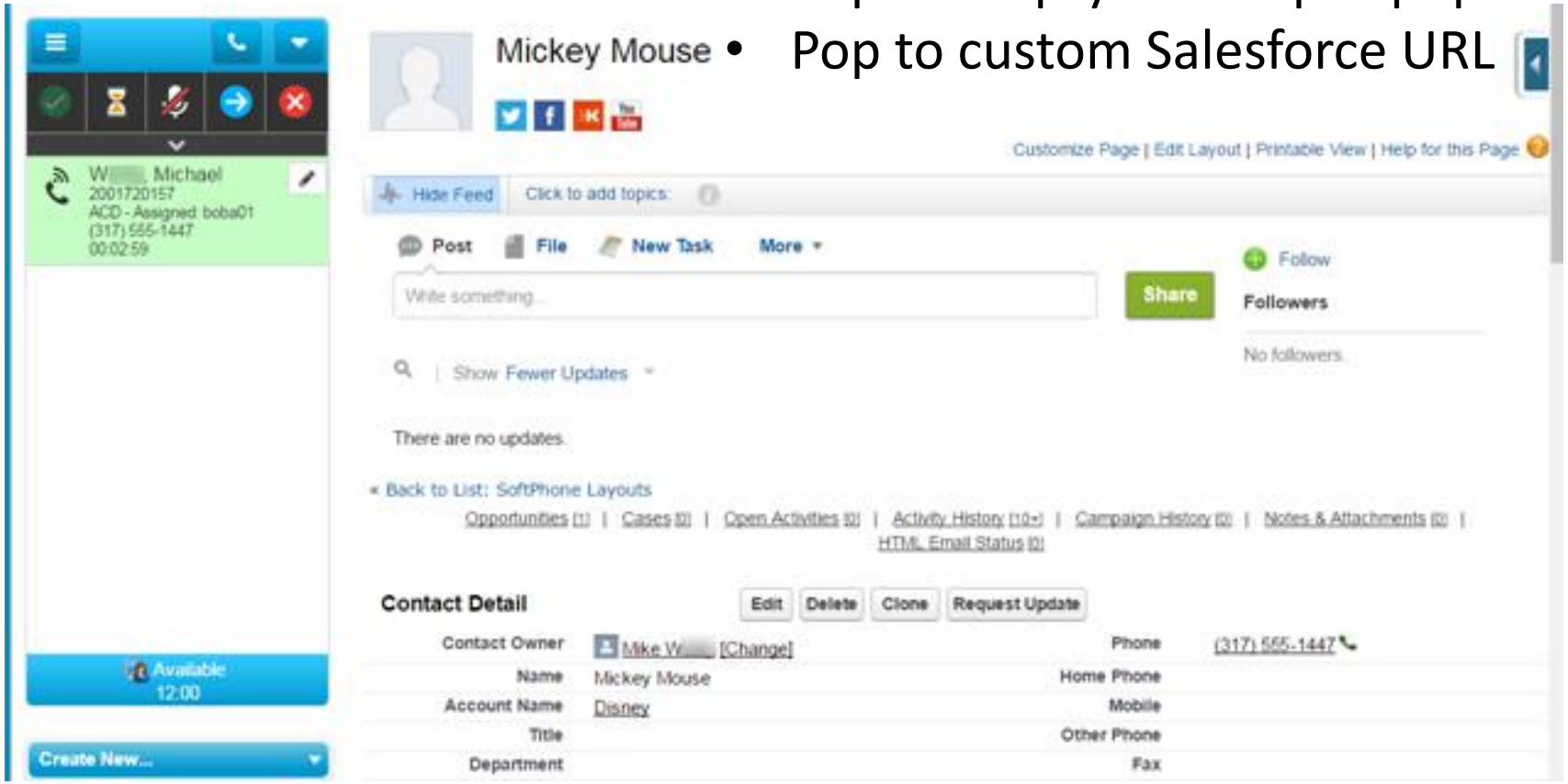


System wide or personal responses

Screen Pop

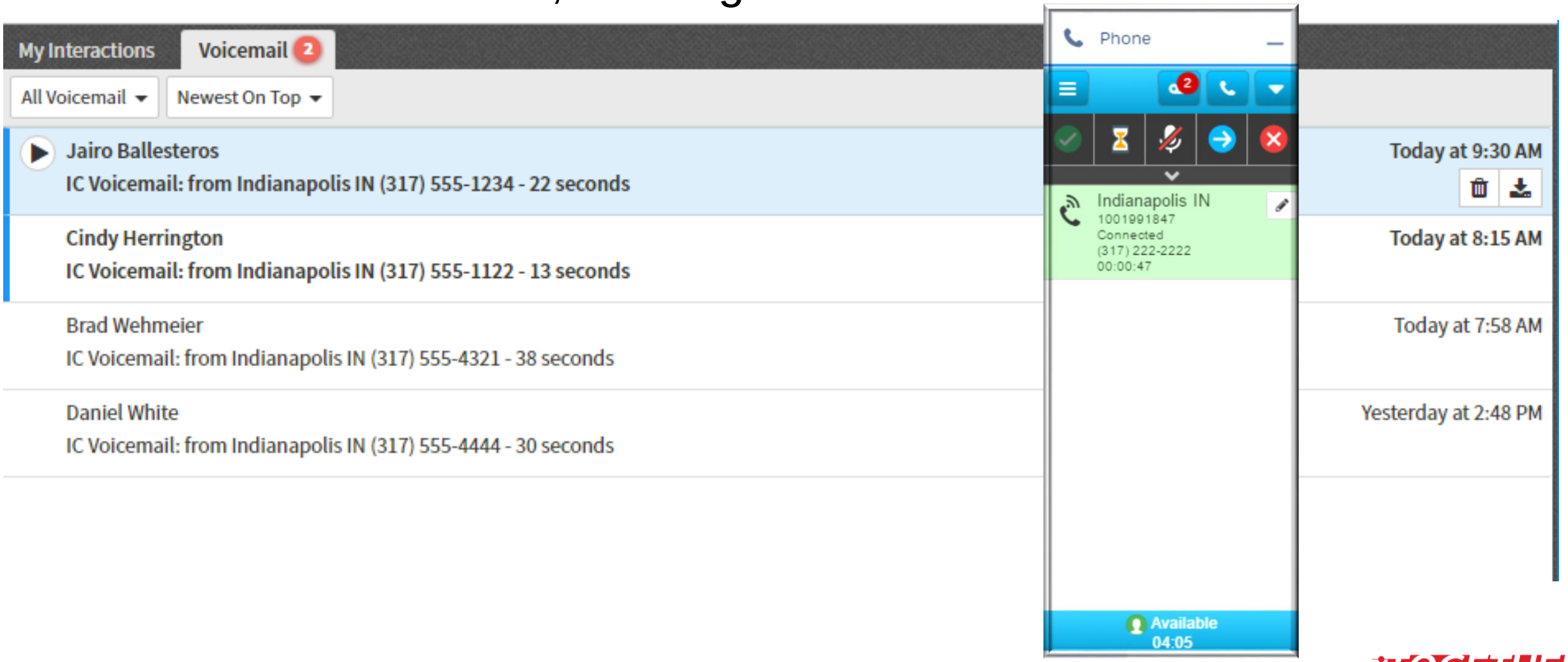
Screen pops based on ANI (default behavior)

- Pop to search result based on IVR entry
- Pop to empty record
- Pop to empty record pre-populated with IVR data
- Pop to custom Salesforce URL



Coming up – Route voicemail attachments

- View a list of voicemails, message count indicator



Roadmap for 2nd Half of 2017

- User experience improvements
  - Show status notes and until time in directory view
  - Add search, type ahead and favorites to status list
  - Add extension number to directory display
- Omni channel presence sync
  - Protect an agent from being routed interactions from both products simultaneously by setting statuses to sync between Omni-Channel and PureConnect
- Evaluate Salesforce External Routing API Pilot
  - Salesforce sends pending service routing events to PureConnect
  - PureConnect determines routing decision and creates agentwork record
  - Agent accepts or declines work through Omni interface (*not via CIC4SF interface*)
- Add ability to view workgroup queue stats
  - Requires PureConnect 2017R4
  - View queued up incoming interactions for the workgroup within the interface

PureCloud

PureCloud for Salesforce

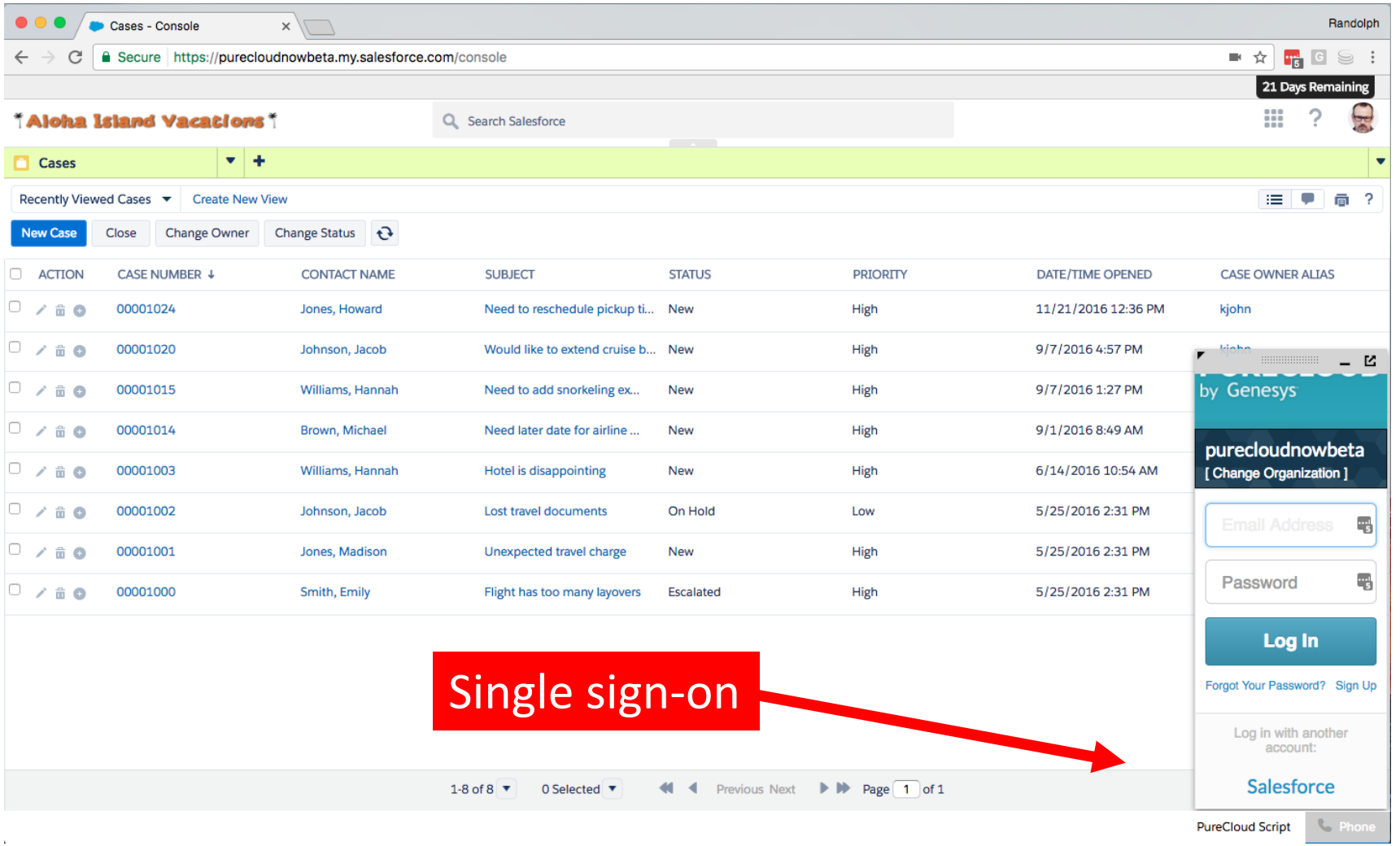
PureCloud

A unified, all-in-one cloud customer engagement and employee collaboration solution that is easy to use and quick to deploy with a modern user experience, offered on a cutting edge platform built for rapid innovation.

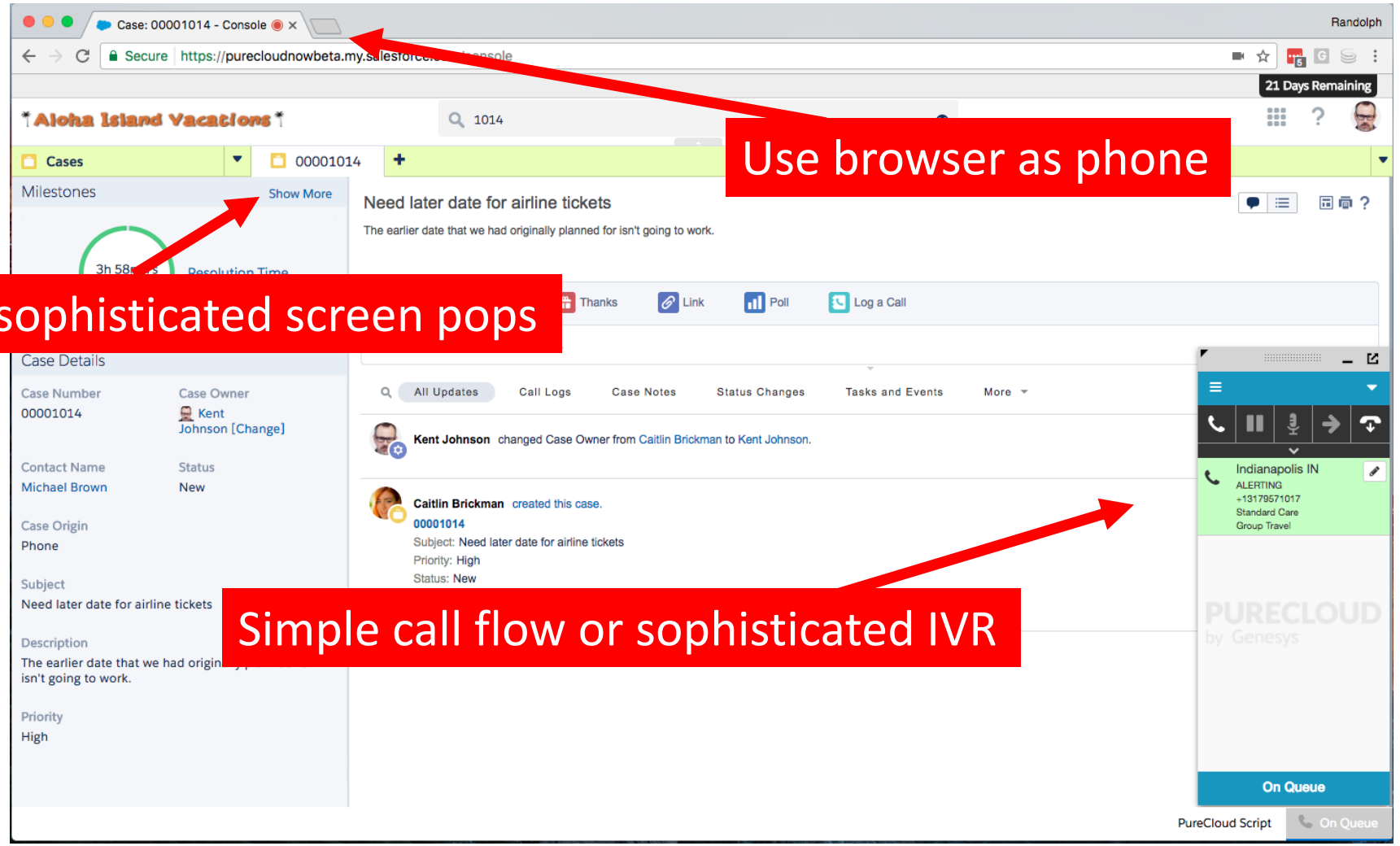
Salesforce App Exchange Listing

https://appexchange.salesforce.com/listingDetail?listingId=a0N30000000pvMdEAI

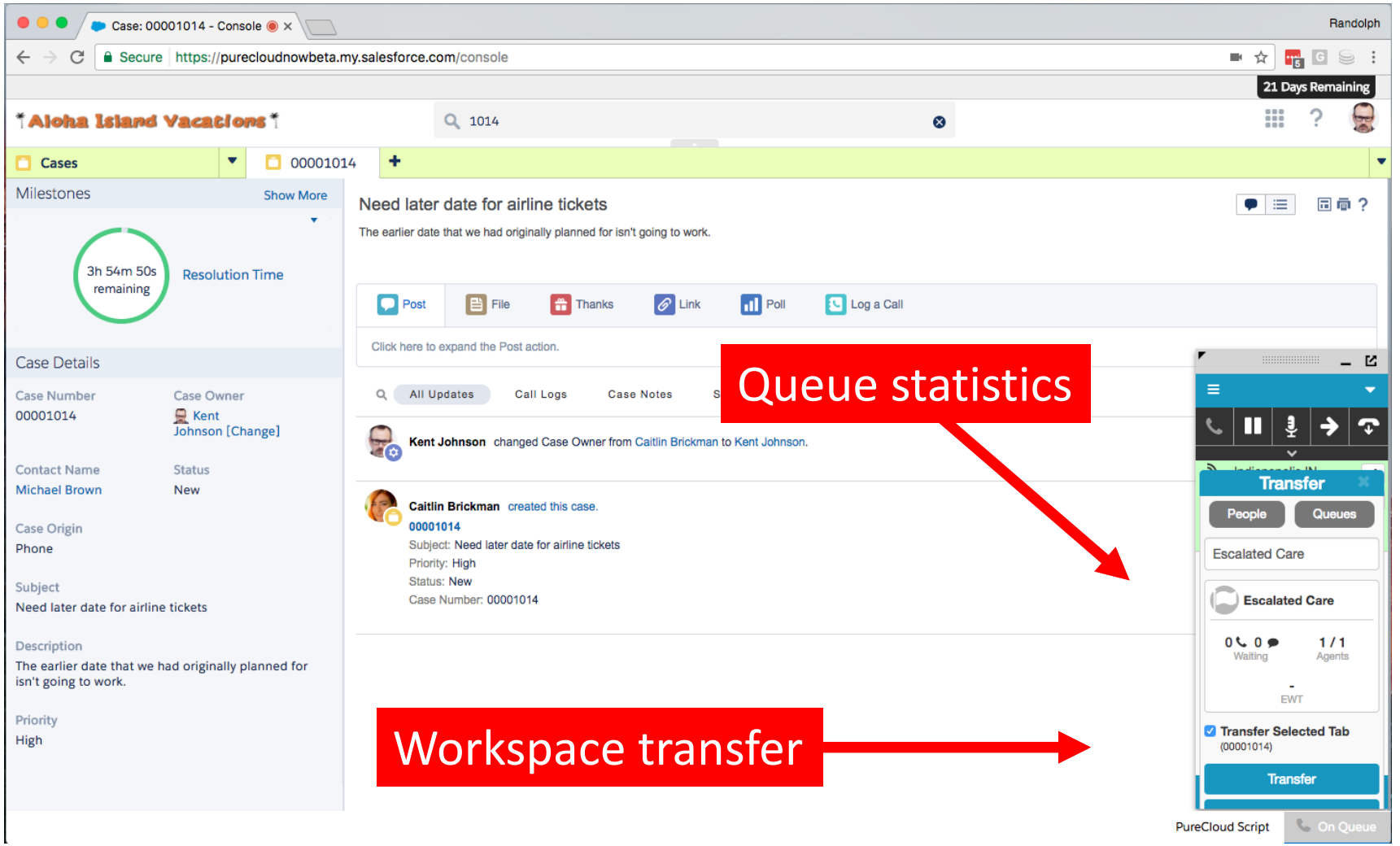
Agent


Cases - Console
Randolph
Secure https://purecloudnowbeta.my.salesforce.com/console
21 Days Remaining
Aloha Island Vacations
Search Salesforce
Cases
Recently Viewed Cases
Create New View
New Case
Close
Change Owner
Change Status
ACTION
CASE NUMBER
CONTACT NAME
SUBJECT
STATUS
PRIORITY
DATE/TIME OPENED
CASE OWNER ALIAS
00001024 Jones, Howard Need to reschedule pickup ti... New High 11/21/2016 12:36 PM kjohn
00001020 Johnson, Jacob Would like to extend cruise b... New High 9/7/2016 4:57 PM
00001015 Williams, Hannah Need to add snorkeling ex... New High 9/7/2016 1:27 PM
00001014 Brown, Michael Need later date for airline ... New High 9/1/2016 8:49 AM
00001003 Williams, Hannah Hotel is disappointing New High 6/14/2016 10:54 AM
00001002 Johnson, Jacob Lost travel documents On Hold Low 5/25/2016 2:31 PM
00001001 Jones, Madison Unexpected travel charge New High 5/25/2016 2:31 PM
00001000 Smith, Emily Flight has too many layovers Escalated High 5/25/2016 2:31 PM
Single sign-on
1-8 of 8
0 Selected
Previous Next
Page 1 of 1
by Genesys
purecloudnowbeta
[Change Organization]
Email Address
Password
Log In
Forgot Your Password? Sign Up
Log in with another account:
Salesforce
PureCloud Script
Phone

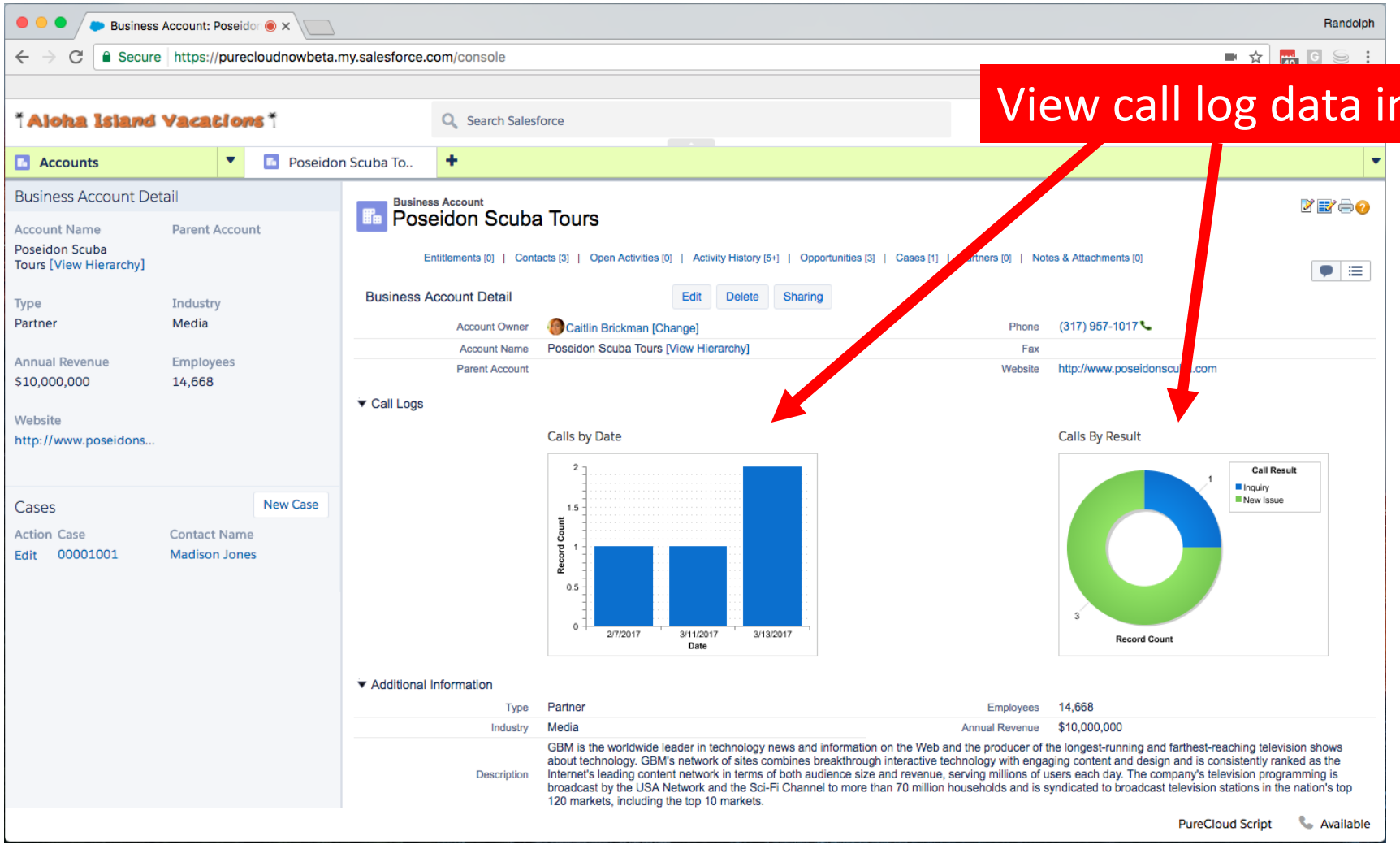
Agent


Case: 00001014 - Console
Randolph
Secure
21 Days Remaining
Aloha Island Vacations
1014
Cases
00001014
Milestones
Show More
Need later date for airline tickets
The earlier date that we had originally planned for isn't going to work.
Thanks
Link
Poll
Log a Call
Case Details
Case Number
00001014
Case Owner
Kent Johnson [Change]
Contact Name
Michael Brown
Status
New
Case Origin
Phone
Subject
Need later date for airline tickets
Description
The earlier date that we had origin
isn't going to work.
Priority
High
All Updates
Call Logs
Case Notes
Status Changes
Tasks and Events
More
Kent Johnson changed Case Owner from Caitlin Brickman to Kent Johnson.
Caitlin Brickman created this case.
00001014
Subject: Need later date for airline tickets
Priority: High
Status: New
Indianapolis IN
ALERTING
+13179571017
Standard Care
Group Travel
PURECLOUD
by Genesys
On Queue
PureCloud Script
On Queue
Use browser as phone
Simple or sophisticated screen pops
Simple call flow or sophisticated IVR

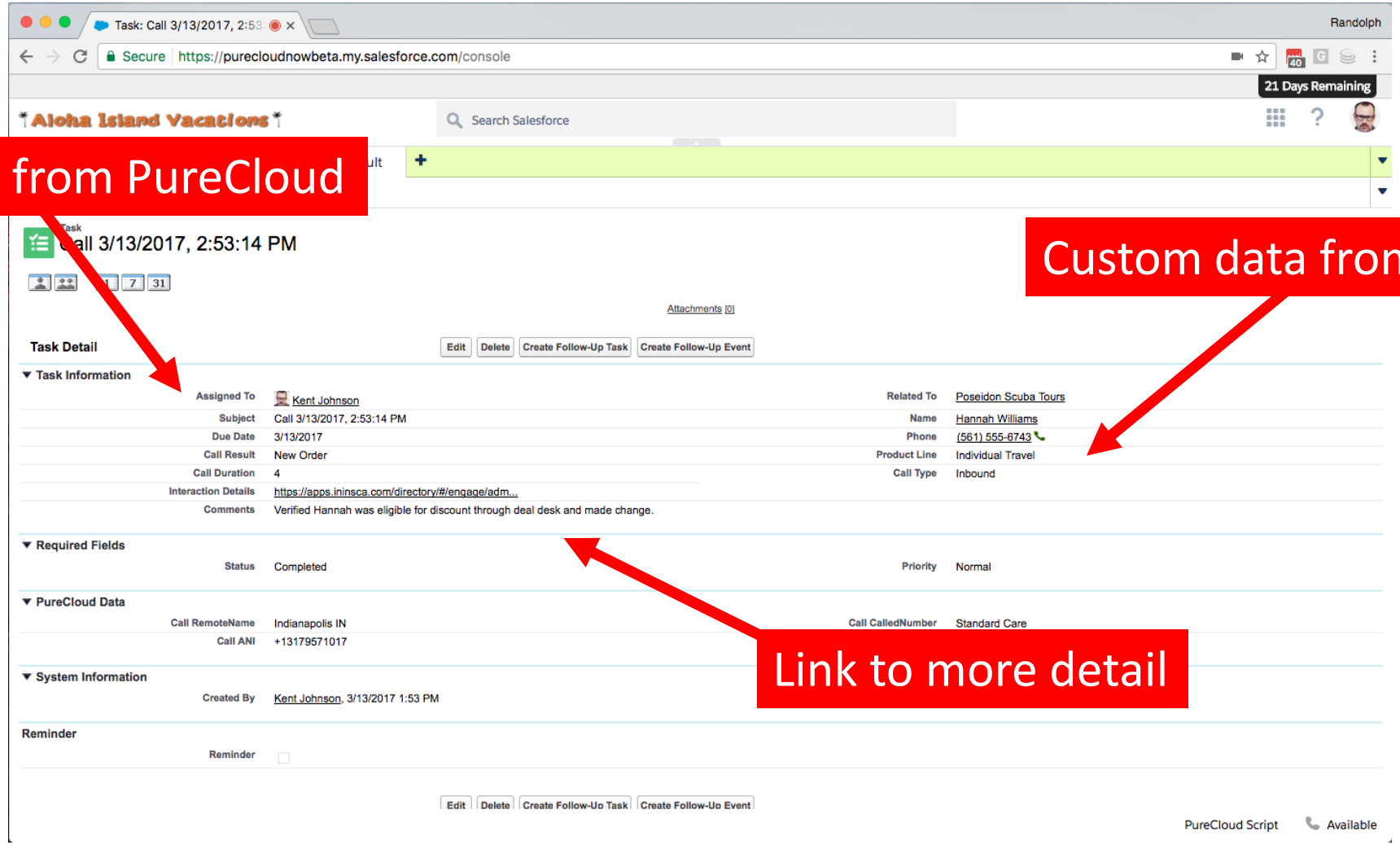
Agent


Case: 00001014 - Console
Randolph
Secure https://purecloudnowbeta.my.salesforce.com/console
21 Days Remaining
Aloha Island Vacations
1014
Cases
00001014
Milestones
Show More
3h 54m 50s remaining
Resolution Time
Case Details
Case Number
00001014
Case Owner
Kent Johnson [Change]
Contact Name
Michael Brown
Status
New
Case Origin
Phone
Subject
Need later date for airline tickets
Description
The earlier date that we had originally planned for isn't going to work.
Priority
High
Need later date for airline tickets
The earlier date that we had originally planned for isn't going to work.
Post
File
Thanks
Link
Poll
Log a Call
Click here to expand the Post action.
All Updates
Call Logs
Case Notes
Kent Johnson changed Case Owner from Caitlin Brickman to Kent Johnson.
Caitlin Brickman created this case.
00001014
Subject: Need later date for airline tickets
Priority: High
Status: New
Case Number: 00001014
Queue statistics
Workspace transfer
Transfer
People
Queues
Escalated Care
Escalated Care
0 0
Waiting
1 / 1
Agents
-
EWT
Transfer Selected Tab
(00001014)
Transfer
PureCloud Script
On Queue

Manager / Business User



Manager / Business User

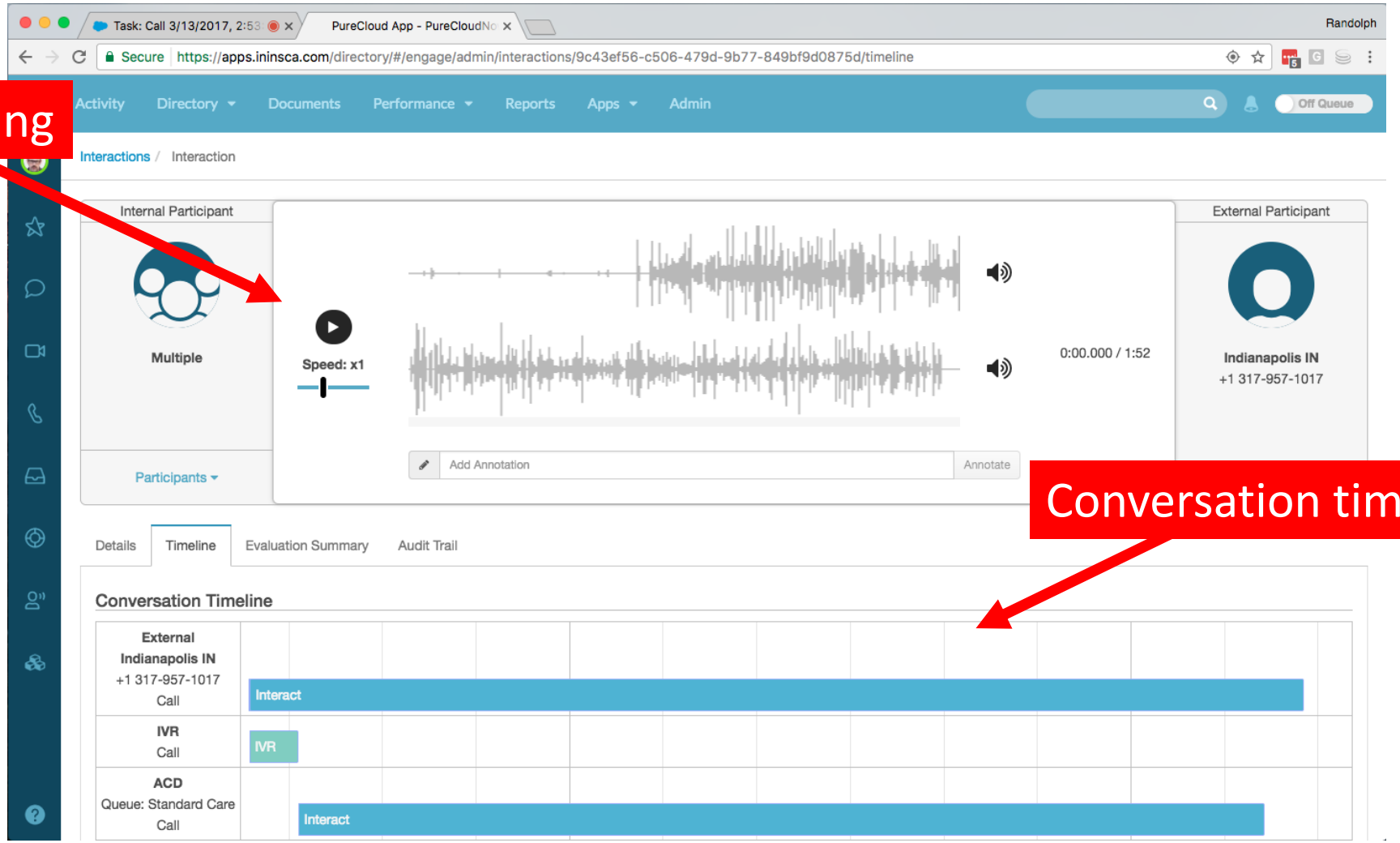


Default data from PureCloud

Custom data from PureCloud

Link to more detail

Manager / Business User



JOINT VISION

	NOW	2H 2017	2018+
PURE**ENGAGE** POWERED BY GENESYS ENTERPRISE EDITION FOR BOTH ON-PREMISE AND CLOUD	• Voice, inbound, chat with adapter – SFDC Console and Classic • All channels with Workspace Web – SFDC Console only	• Lightning support with Workspace Web for voice • +Work items with workspace web – SFDC Console only	• Lightning support with Workspace Web for chat, email, outbound, work items
PURE**CONNECT** POWERED BY CUSTOMER INTERACTION CENTER (CIC) FOR BOTH ON-PREMISE AND CLOUD (CAAS)	• Lightning Support • Voice, callback, chat, email, Generic Objects, email to case interactions, dialer integration – SFDC Console and Sales mode	• Omnichannel presence sync • View workgroup queue stats • Centralized log collector • UI enhancements • WebRTC (voice)	• Campaign mgmt for outbound dialing • Surfacing best of Interaction Connect features for SFDC
PURE**CLOUD** BY GENESYS	• Lightning Support • Voice, callback, chat, email, outbound dialing support, simple omnichannel presence sync – Console and Sales Mode	• Salesforce email routing • Campaign mgmt for outbound dialing through SFDC • UI enhancements	• Surfacing best of new PureCloud features

Key Take Aways

- The choice is yours
  - When your CRM is Salesforce, you have the choice to implement the best integrated desktop
- Time to connect
  - Visit our Booths for a live demo

Genesys + Salesforce = Amazing Customer Experiences

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Cindy Herrington, PureConnect Product Management

Randolph Rife, PureCloud Product Management