

Genesys UC-Connect: A Link to Collaborative Customer Care

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UC-Connect, from Alcatel-Lucent's Genesys Telecommunications Labs, makes significant strides toward collaborative customer care. The mechanism derives "agent state" and leverages "presence" information in tracking the availability of remote and back-office employees. However, its "Interaction Preview and Auction" could be a game changer in promoting more collaborative customer care.

An Evolutionary Step to Collaborative Customer Care

In this year's Foundations Report ("Voice Self-Service Meets Web 2.0" – April 2009), Opus Research observed that the principles of Web 2.0 are taking hold on-screen for users of desktops, laptops and mobile devices, providing mechanisms for leveraging Web services and human interaction into the customer care context. Additionally, it gives enterprises a mechanism to leverage investment in Web sites into phone-based self-service.

Formal, brick-and-mortar contact centers stand out as enclaves of orthodoxy in the fast-changing Web 2.0 world. In some instances, agent desktops have been called on to display Instant Messaging-like dialogue boxes to support "Web chat." Results have been mixed, largely because of a general failure to integrate (or "orchestrate") a combination of synchronous and asynchronous communications modes with legacy contact center agent monitoring and workflow management resources.

The Missing Link in the Move to Customer Care 2.0

Genesys' UC-Connect suite (introduced on June 8, 2009) is a step from the locked-down, hierarchical contact center toward an architecture that is more open to participation from remote personnel, like loan officers in bank branches or technical support personnel in their cubicles. It starts by providing a crucial link between formal contact centers and enterprise-wide messaging platforms.

Genesys developers have defined a way to map the presence information from OCS, SameTime, Siemens OpenScape and Alcatel-Lucent's MyInstant Communicator, into status indicators that make sense to the Genesys Customer Interaction Manager. When employees turn on their PCs and log onto the enterprise messaging platform, they are simultaneously logged on as remote contact center agents. Employees can also indicate when they are "away" from their desk or otherwise put up the "do not disturb" sign.

Not Aardvark, but Getting There

Genesys has long said that it has no interest in creating its own UC-collaboration product. Rather it relies on the refinements that IBM, Microsoft, Siemens and Alcatel-Lucent make to their messaging and presence management suites. We think that's a very good strategy. In too many instances, unified communications has been a set of solutions for largely undefined problems. This is not the case enlisting real-time

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aid from subject matter experts around an enterprise and, ultimately, around the globe.

UC-Connect leverages presence awareness (and ultimately other “tags” or metadata) to keep track of the availability of subject matter experts and engage them in customer care conversations on an “as needed” and “as available” basis in the least disruptive way.

The Basic Functional Description

At base, the software provides links between the Genesys Customer Interaction Manager (CIM) and popular enterprise-wide productivity suites: IBM’s SameTime and Microsoft’s Office Communications Server 2007 R2 (OCS), as well as Siemens OpenScape and parent company Alcatel-Lucent’s MyInstant Communicator. Its first-order function is to capture status indicators from instant messaging buddy lists (such as free, busy, away, do not disturb) and interpret them as “agent states” in the context of a contact center application.

Employees outside the formal contact center can use their IM clients to indicate their ability to take calls. The system can passively determine or impute other attributes for agents. It can, for instance, detect when the screen has gone “idle.” More importantly, employees or system administrators can assign each participating employee to a “virtual work group.” This information is vital for “intelligent” routing or transfer of calls to an individual with the proper skill set.

Genesys will eventually figure out how to define and process additional, customized agent states and associated rules. An easy one to foresee is the “away from the office” accompanied by the rule “to be reached on mobile phone only.” In this respect, Genesys UC-Connect is a “consumer” of presence data from the collaboration suites. It uses the data to help determine how to treat each incoming or transferred call.

Interaction Preview and Auction

Field experience has led Genesys to develop a mechanism that prevents individual agents from dominating the time of any single back office or remote agents. Even though the systems knows the availability of each registered client, it does not display presence status on an agent’s desktop. Instead, the system abstracts individual identities into “skill sets” or “virtual workgroups and displays an aggregated view the availability of the groups as “skill set pool.”

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Members of the skill set pool can bid to answer a call based on an "Interaction Preview," which is a screen pop displaying the customer's status, reason for calling, transaction history and the like. This auction mechanism is a basic function of UC-Connect. It can provide all "available" agents with a preview and then apply an algorithm to determine the "winner" based on expressed interest, proper skills, certifications and the like.

Game On!

Even though it uses terminology like "Interaction Preview and Auction," the UC-Connect approach is but a baby step toward Web 2.0 compliant social search function. Still, it is an evolutionary step that marks a real transition from hard-coded, hierarchical contact center infrastructure, toward a community-based response system.

Genesys has no intention to offer a unified communications product of its own. Instead, it subscribes to the presence information (and other metadata) that collaboration suites aggregate from its users. In the case of IBM's SameTime and its suitemates (like Quickr) there is a lot of material to work with. Users are encouraged to log their interests, post reading material into Digg-like repositories and leave breadcrumbs of their favorite Web sites.

Orchestrating Enterprise-wide Customer Care

The suitability of Genesys' approach to support social searching and customer care is self-evident. Ultimately, especially in the wake of its acquisition of Conceros, the system can route assignments or tasks (such as responding to emails or standing queries) in ways that are best suited to resolve a customer's concern.

That's the long-range view. Today's product takes the first step, the CIM platform serves as a rudimentary task broker, routing calls based on availability within a self-defined virtual workgroup.

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