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An IBM ECM & Genesys Technical White Paper

Optimize Customer Service and Efficiency

Integrating Front and Back
Office Processes

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Executive Summary

To compete in business today, companies in all industries need to focus their attention on providing an outstanding customer experience. Therefore, companies require a well orchestrated contact center and back office system that expedites the proper handling of customer interactions from start to finish, and ensures that valuable resources are available for the most profitable customers. To do this successfully, savvy organizations are integrating and optimizing front and back office processes.

Typical customer interactions start with a call handled by the contact center. Routine queries can usually be quickly handled through self-service or by a contact center agent, but more complex interactions are escalated to a specialist in the back office. In the latter case, the back office professional will require both current information (such as the reason for the call, and the account number) and historical records (such as CRM data, claim or application status, recent interactions, original contract, etc.) to efficiently handle the request. The life-cycle of the transaction can involve multiple interactions requiring calls, Web forms, faxes, and other documents, as well as multiple support people: contact center personnel, back office experts, supervisors, etc.

It should, therefore, come as no surprise that a recent survey showed that 75% of a contact center's costs are directly related to personnel, and that agents typically spend 20% of their time handling call-related administrative tasks such as those described above (even the simple collection of a signature can delay processing by one to five business days), rather than on the phone performing revenue-generating activities, such as up- and cross-selling.

From an operational perspective, customer interactions are not being properly managed because the front end contact center system and the back end business process system are often not integrated and operate independently from one another. To ensure that the interactions are handled more effectively and efficiently, Genesys and IBM have integrated the Genesys Customer Interaction Management (CIM) platform and the IBM FileNet Business Process Management (BPM) solution into a unified front office and back office customer service solution. By closely coupling Genesys CIM and IBM FileNet BPM, contact center and back office operating costs can be cut by 10% to 15%, while significantly improving customer service, satisfaction, and loyalty.

This White Paper explains the technology, integration, and business value of the IBM and Genesys solution to help Line of Business Executives improve the overall productivity of their customer service efforts, and to assist Technology Implementation Decision Makers in optimizing customer service processes.

Business Need and Value

In many companies today, there is a distinct difference in how various interactions are managed, handled, analyzed, and reported-on across the enterprise. For example, calls are initially handled by the contact center, and company executives can usually recite pertinent contact center metrics such as service levels, time to answer, handling times, agent utilization, and call volumes (daily, weekly, and monthly). Those calls requiring specialized skills and other types of interactions (such as Web forms, e-mail, and faxes), however, are often routed to the back office, branch, or other specialist group. And, if executives were to be asked about the equivalent metrics for these kinds of interactions, virtually none would have the information. Clearly, the front and back office processes are not only managed very differently, but often do not have real-time access to the same information, and rarely have the ability to predict or report on workloads or work together to balance and adapt to changing conditions.

Surveys show that most companies rate their service as “good” to “excellent,” and indicate that they support multiple contact channels. However, surveys of their customers reflect much lower service scores; what’s more, mystery shopping¹ reveals that in contact centers, the front office rarely knows if a caller has previously sent information via other channels such as e-mail, fax, or Web form.

The difference in perception can largely be explained by studies that indicate customers want to communicate with a company through whichever channel they prefer; expect the same level of service regardless of which channel they use; want their service requests fulfilled efficiently and effectively, regardless by whom; and rate overall service as closest to the lowest experienced.

The breakdown appears to be that, while it’s common for companies to offer multiple ways to interact with customers, they have no way to unify the handling of these communication channels or the prior customer interactions with them, and therefore they have no way to access and use the information previously provided to help in solving current queries. In a recent study of 30 Fortune 1000 companies, all of the respondents said they answered phone requests within a matter of minutes, although there was considerable variation. In contrast, requests by e-mail, Web forms, and fax typically required quite a few hours, and many were never answered at all or the requestor was directed to call during business hours.

The solution is to unify the management of all inbound and outbound interactions, and to integrate the front and back office processes, in order to gain a complete view of customer service operations. At the same time, progressive companies are moving back office processes from a typical *pull* approach scenario where workers select what they want to work on from a shared queue, to a *push* approach that assigns tasks based on factors such as priorities,

¹ The collection of information from stores and company Web pages, as well as the aggregation of experiences reported by researchers behaving like consumers.

required skills, availability, previous agent engagement, and resource cost. The goal is to provide excellent customer service which meets, if not exceeds, Service Level Agreements (SLAs) and thus earn the “right” to up-sell and cross-sell additional products and services.

By implementing the integrated Genesys and IBM solution, FileNet BPM can generate a list of tasks that need to be performed, while the CIM platform can effectively schedule those tasks with the optimum personnel — feeding activities to agents and back office workers based on business priorities, such as customer segment, business value, SLAs, and so on.

Integrating existing disparate systems under the now common umbrella of Customer Relationship Management (CRM) systems has led to great service improvements. However, large gaps and inefficiencies must still be addressed in order to provide a comprehensive and consistent customer experience regardless of communication channels or lines of business involved in handling a customer service request. Indeed, customers complain that service varies significantly, depending not only on the department, but also the media type, through which the customer chooses to interact with the enterprise.

At the root of these problems are the following factors:

- Inability of the back office to handle non-voice interactions (work items) such as faxes and e-mail with the same level of efficiency as real-time voice interactions that are handled by a modern contact center
- Absence of a centralized document repository along with the associated costs of additional staff needed to classify, file, locate, retrieve and deliver the documents to the appropriate worker
- Delays in servicing customer requests because of slow access to required documents, lost/misfiled documents, and lack of concurrent access to documents
- Lack of visibility into overall business process analytics caused by the traditional separation of contact center processes from other enterprise processes (e.g. “siloes” information, either based on media or function/department)

Genesys and IBM enable enterprises to address these inefficiencies through the merger of traditionally different technology domains:

- Customer Interaction Management (CIM) for distribution of real-time interactions (i.e. calls) as well as non real-time interactions (documents, faxes, work items, etc.)
- Enterprise Content Management (ECM) for document capture, archival, retrieval, and lifecycle management (retention)
- Business Process Management (BPM) for document workflow, simulation, and analysis

This enables modern organizations to accommodate any customer service request regardless of the media channel chosen by the customer. The integrated solution’s core capability is the processing of non-real-time service requests, traditionally attributable to back office operations within a contact center (front office) environment. This capability enables leading enterprises to differentiate themselves through greater Customer Service Representative (CSR) and back office worker efficiency, reduced cost of operations, and improved customer service. Integrating Genesys CIM and IBM FileNet BPM can also enable back office processes to handle traditional front office tasks (i.e. during times of higher or abnormal call activity), which may lead to creation of a true enterprise-wide blended service environment with real-time task distribution balance and strict SLA adherence, regardless of the nature of customer service requests.

The combination of Genesys Customer Interaction Management, routing, and CRM integration with IBM FileNet BPM uniquely offers the breadth of capabilities and open systems flexibility to address complex customer handling processes such as an Application Request Process:

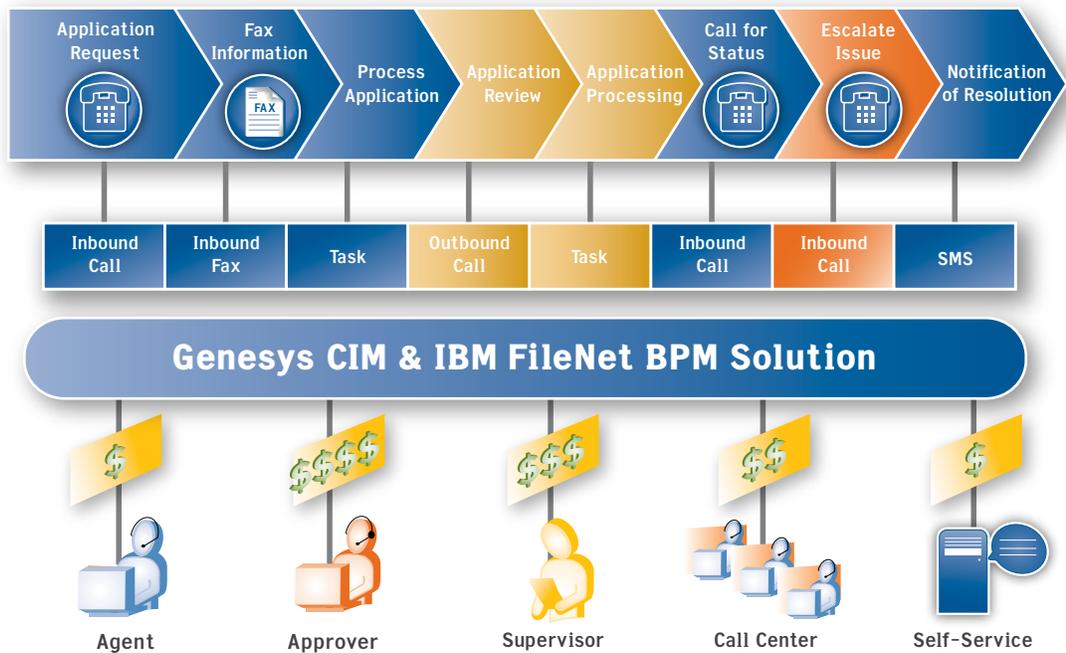


Figure 1. Application Request Process

Integrating FileNet BPM and the CIM platform enables companies to reduce costs and improve service by:

- Unifying the handling of multiple transaction types — e-mail, Web forms, fax, calls
- Providing pertinent information with the request — collected by IVR, in CRM

- Routing requests intelligently — based on priority, skills, cost, availability, previous agent
- Predicting and balancing workloads — use hybrid workers, adjust outbound activities
- Meeting compliance requirements — complete transaction records
- Improving cross-/up-sell effectiveness — customize offers and factor in success rates
- Enhancing management visibility — complete transaction visibility, bottlenecks, etc.

Architecture Overview

Genesys Customer Interaction Management Platform

The Genesys Customer Interaction Management (CIM) Platform processes, manages, routes, and reports on the entire interaction life cycle process of any media or activity in any contact center environment, improving customer service, customer satisfaction, and operational efficiencies while simplifying the complexity of customer interaction management.

In basic terms, the CIM Platform is a framework for handling all customer interactions that enter your enterprise, including voice (inbound and outbound), e-mail, Web forms, Web chat, SMS, video, documents, faxes, and work tasks.

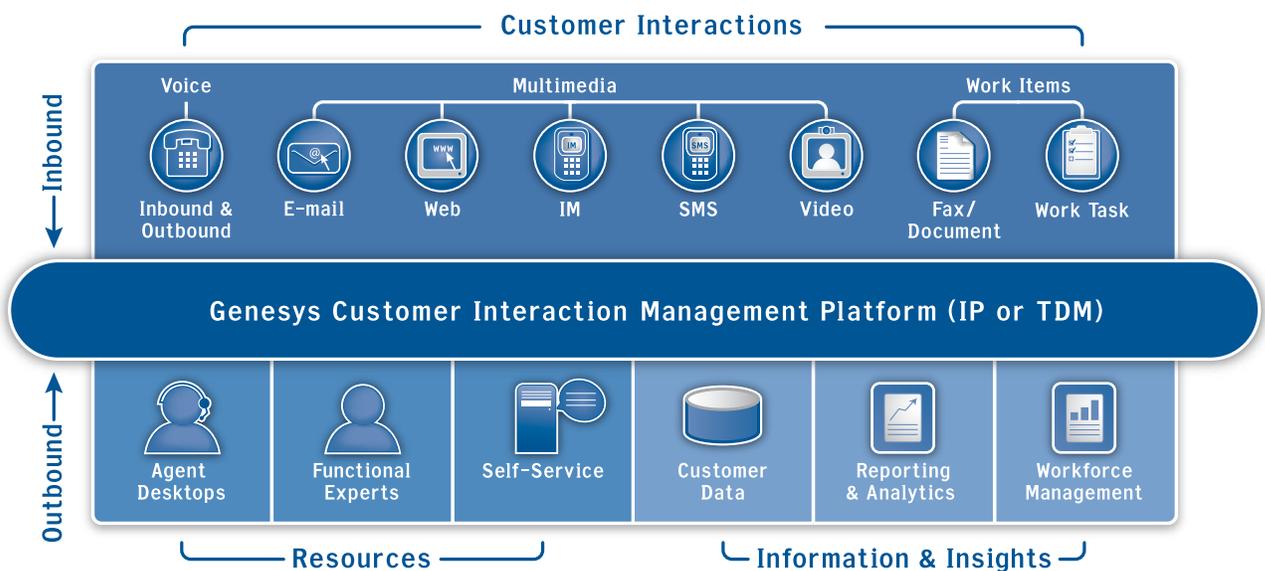


Figure 2. Genesys Customer Interaction Management Platform

Core CIM Platform capabilities include:

- Choice of single site or multi-site deployment
- Real-time routing (enterprise & network level)
- Interaction management workflows for fax, documents, and tasks (user-defined)
- Multi-channel support
- Real-time & historical reporting for all interaction types
- Switch connectivity (TDM, Hybrid, and SIP)
- Centralized management and configuration
- Open architecture

IBM FileNet Business Process Management

IBM FileNet Business Process Management suite is designed to increase performance, reduce cycle times, and improve productivity. FileNet BPM automates, streamlines, and optimizes complex business processes to manage workflow and content among people and systems throughout your enterprise.

Core BPM capabilities include:

- Optimizes operational efficiencies and resource utilization while enforcing corporate policies and improving process consistency
- Provides process visibility and control, analytics, and simulation to enable process improvement and optimization
- Improves process flows and transaction times, and automatically manages process exceptions to allow agile, immediate responses to business events, including customer demands
- Supports rapid deployment of improved processes while minimizing impact on normal business operations

IBM FileNet BPM is an integrated part of IBM FileNet P8 platform, which excels in managing content-intensive processes that require content management and compliance capabilities.

IBM FileNet BPM leverages open and standard technologies such as J2EE and Web services, and complies with important process standards. It runs on many popular databases, operating systems, and application servers. FileNet BPM suite consists of the following components:

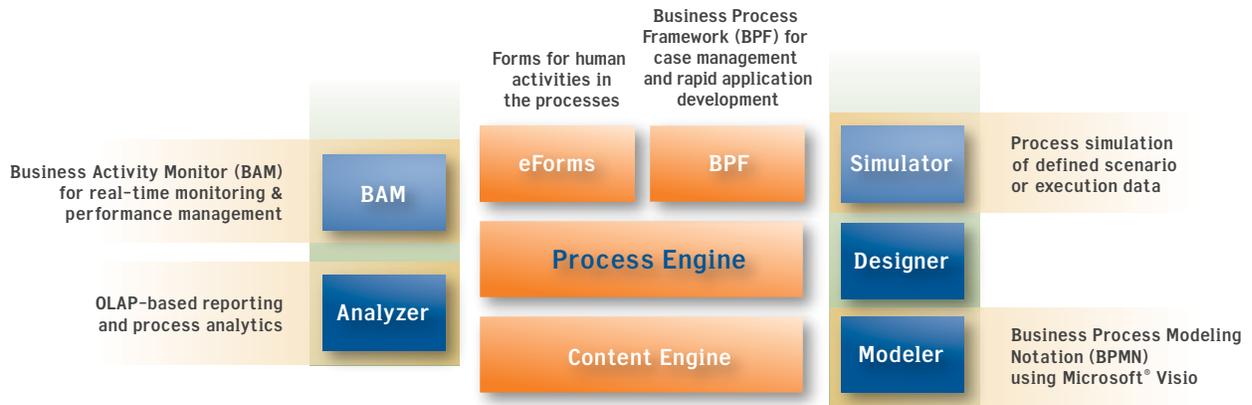


Figure 3. Key Components of the IBM FileNet BPM Suite

Integrating Genesys CIM and IBM FileNet BPM

The combination of Genesys CIM and IBM FileNet BPM is a solution that captures, processes, and routes operational activities and non-real-time customer interactions within the IBM FileNet BPM platform, and then integrates this with the real-time customer interaction routing capability within the Genesys CIM platform.

A customer reports:

“With this solution, back-office workers transition to call center operations when service levels drop, and then return to their primary jobs when service levels recover. The system is designed so that it actually interrupts work in favor of an urgent call, and then returns the worker to the original task without any loss of data or process.”

The combination of content management and process optimization capabilities, with support for historical and real-time reporting and analytics, creates unique opportunities for today’s enterprise to derive further efficiency gains from the workforce while improving customer service. The main benefit is to enable multi-channel, multi-functional, knowledge-driven workers (sometimes referred to as “blended” agents) to deliver the highest level of customer service, and to ensure that the right interaction/transaction is routed to the best

possible resource at the right time. The integrated solution reduces operational costs by leveraging contact center resources to execute back office tasks during slow periods, and by using back office personnel to fulfill front office tasks during times of heavy load. By consistently balancing the workloads of both front and back office agents while making more information readily available and optimally matching the tasks to the right person, this solution increases productivity and the speed and quality of the business process and, ultimately, maximizes customer satisfaction.

Interfacing Genesys CIM and IBM FileNet BPM

Both Genesys CIM and IBM FileNet BPM are open architecture software solutions that support standard interfaces and provide published application programming interfaces (APIs) for inter-application integration. Both Genesys CIM and IBM FileNet BPM support Web services, which is the recommended method for communicating between CIM and BPM. In FileNet BPM, processes can consume (i.e. invoke) Web services. A process can also be published as a Web service so that a client or application (e.g. Genesys CIM) can consume the process as a Web service. Hence, FileNet BPM and Genesys CIM support Service-Oriented Architecture (SOA) and can effectively fit into an organization’s SOA environment. Both CIM and BPM also support Java scripting.

The Genesys CIM can pass information directly to an IBM FileNet eForm as “active content,” which in turn can initiate a business process without manual intervention. Any change to a piece of content or its metadata (such as its creation, change, and view) is an event that is captured in the system. Such an event can then be linked to an action, such as the launch of a process. Genesys CIM can be used to record all call details and, in some cases, the actual call which, when stored as a file, can then be passed to IBM FileNet Content Manager (CM) for storage as part of a “record.” This can be an important component of a compliance and record management strategy.

In a typical implementation, business process icons representing the activities handled by Genesys CIM (outbound and inbound calls, passing customer information, etc.) are incorporated into the IBM FileNet BPM modeling tool. This enables the process model to be richer, and to fully incorporate all activities as customer interactions are modeled:

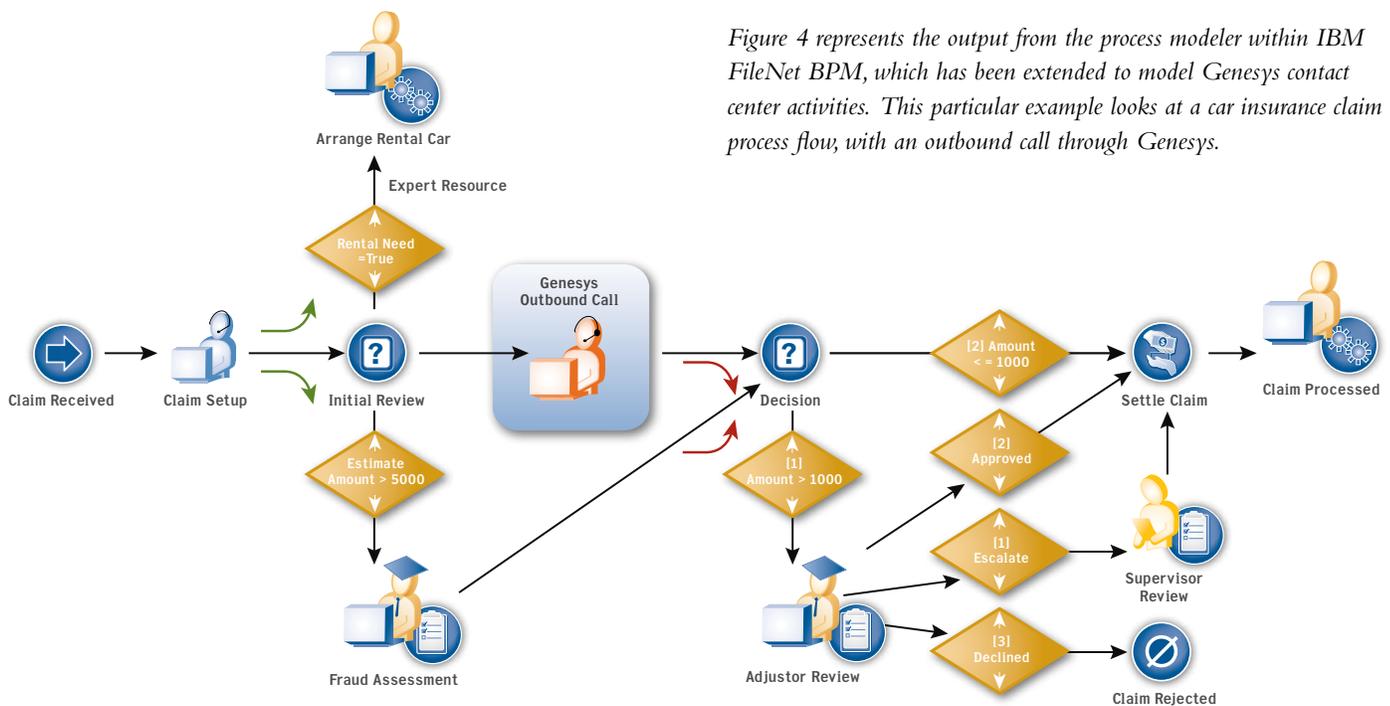


Figure 4 represents the output from the process modeler within IBM FileNet BPM, which has been extended to model Genesys contact center activities. This particular example looks at a car insurance claim process flow, with an outbound call through Genesys.

Figure 4 Insurance Claim Scenario Example

IBM FileNet BPM Process Designer supports the addition of new activities into a workflow, and for the Genesys CIM integration, new tasks and decision points representing typical contact center and customer interaction activities can be added.

Genesys application interfaces extend the power of the Genesys CIM Platform beyond the contact center. These integrations enable the Genesys routing engine to more efficiently process virtually any interaction or activity according to established business rules. Extending CIM to other areas and application users enables enterprises to manage, queue, and distribute integrated interactions to agents or functional experts from other 3rd-party systems, including:

- Fax servers
- Workflow systems
- Non-Genesys e-mail management and Web chat applications
- Scanned documents
- Web-based training
- Short Message Service (SMS)

Both Genesys and IBM have in-house professional services organizations as well as an extensive network of solution and implementation partners to assist in the development and implementation of Genesys 3rd Party Media integrations.

Genesys CIM and IBM FileNet BPM Architecture

The routing of work items within CIM is typically done with a *push* model where customer interactions are immediately allotted to a relevant resource. The routing of work items within BPM is typically done with a *pull* model where back office agents access queues of work and managers allocate work in their own time. By integrating the features of CIM, 3rd Party Media, and BPM, all types of work can effectively be assigned in a *push* model to the most relevant and available resource within the enterprise or to an outsourcer, which involves the active management of queues of work within IBM FileNet BPM.

Productivity suffers when an agent is in the middle of handling one work item and is then interrupted by a call about another item. By ensuring that agents are working on the highest priority items and are able to work through to completion, agent productivity and customer satisfaction can be optimized.

The following figure provides a block diagram schematic of a typical implementation:

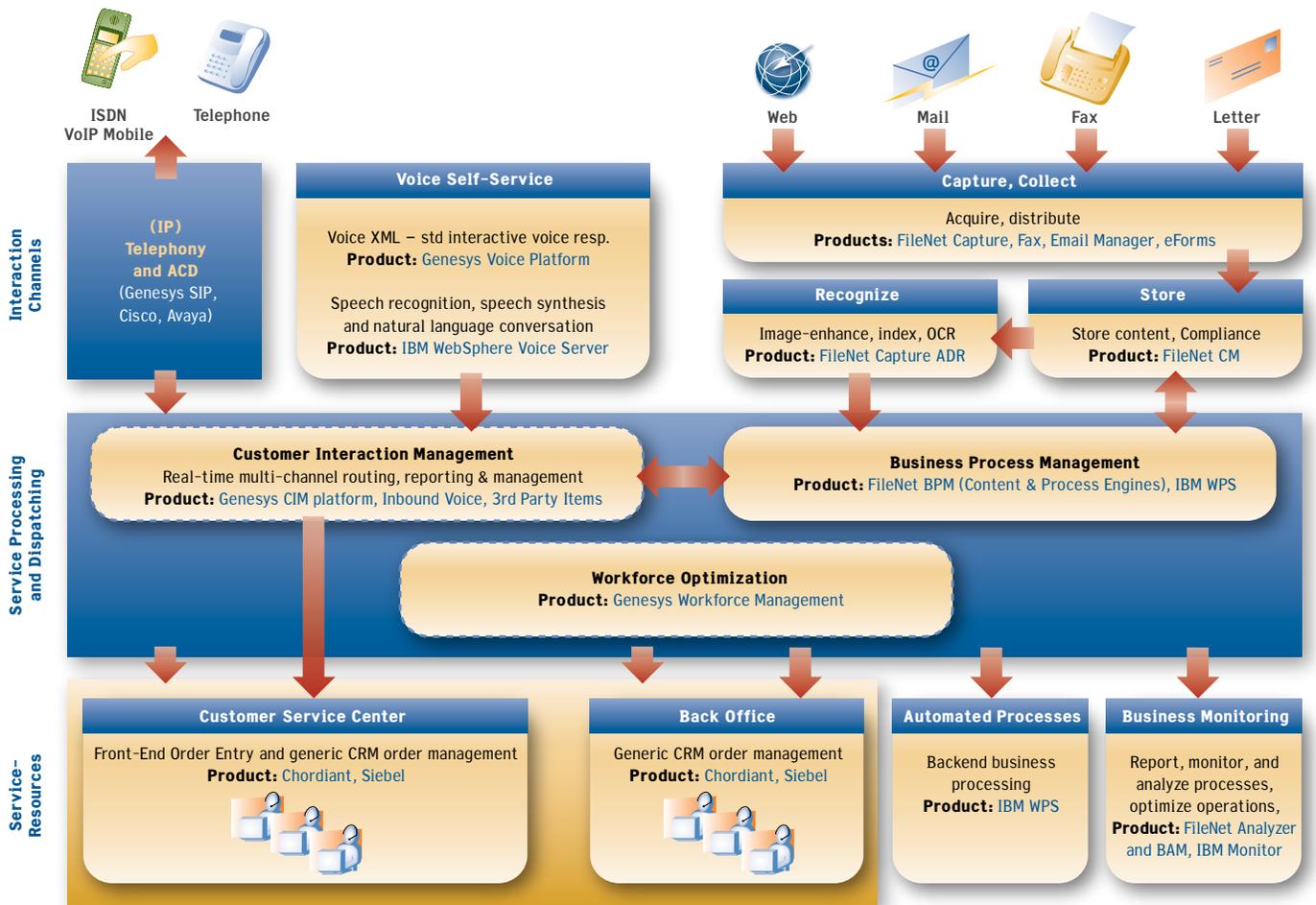


Figure 5. Reference Architecture

Genesys CIM and IBM FileNet BPM Example Implementation

A key to the integrated solution is the persistent storage of transactional work items with state information. IBM FileNet BPM stores all incoming work items directly into its repository, with meta-data stored in a separate database.

Traditionally, the process lifecycle and service levels for non-real-time media, such as documents, are defined in hours, days, or weeks — whereas the lifecycle of voice calls and routing is normally counted in seconds, because outages of seconds can severely harm overall system performance.

Genesys CIM handles the dynamic interaction data (e.g. calls, Web sessions, SMS), while IBM FileNet BPM handles the longer-term storage and retrieval of documents and work items.

Below is a high level architecture showing how different users and systems interact with the combined Genesys CIM and IBM FileNet BPM system to handle transactional work, dynamic communications, and longer-term work items:

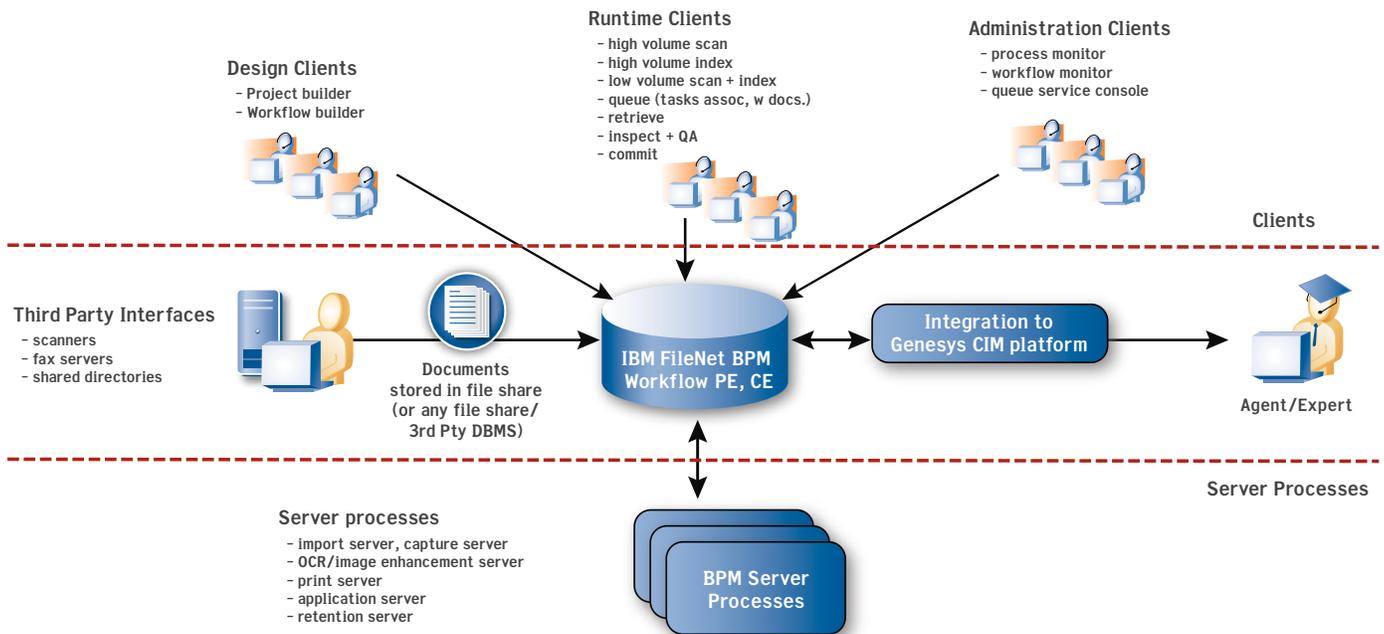


Figure 6. Genesys CIM and IBM FileNet BPM High Level Conceptual Architecture

Technical Implementation Considerations

1. Integration and Information Passing

At the simplest level, Genesys CIM and IBM FileNet BPM are able to pass information and control between the two systems to ensure effective handling of customer activities:

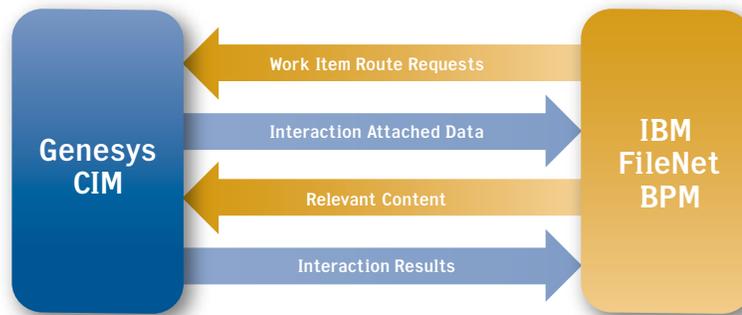


Figure 7. *Conceptual Information Flow between Genesys CIM and IBM FileNet BPM*

The integration of Genesys CIM and FileNet BPM is achieved by a simple *push* model with “request — response” activities between the two packages.

This can be illustrated by a simple example on how the necessary information is passed:

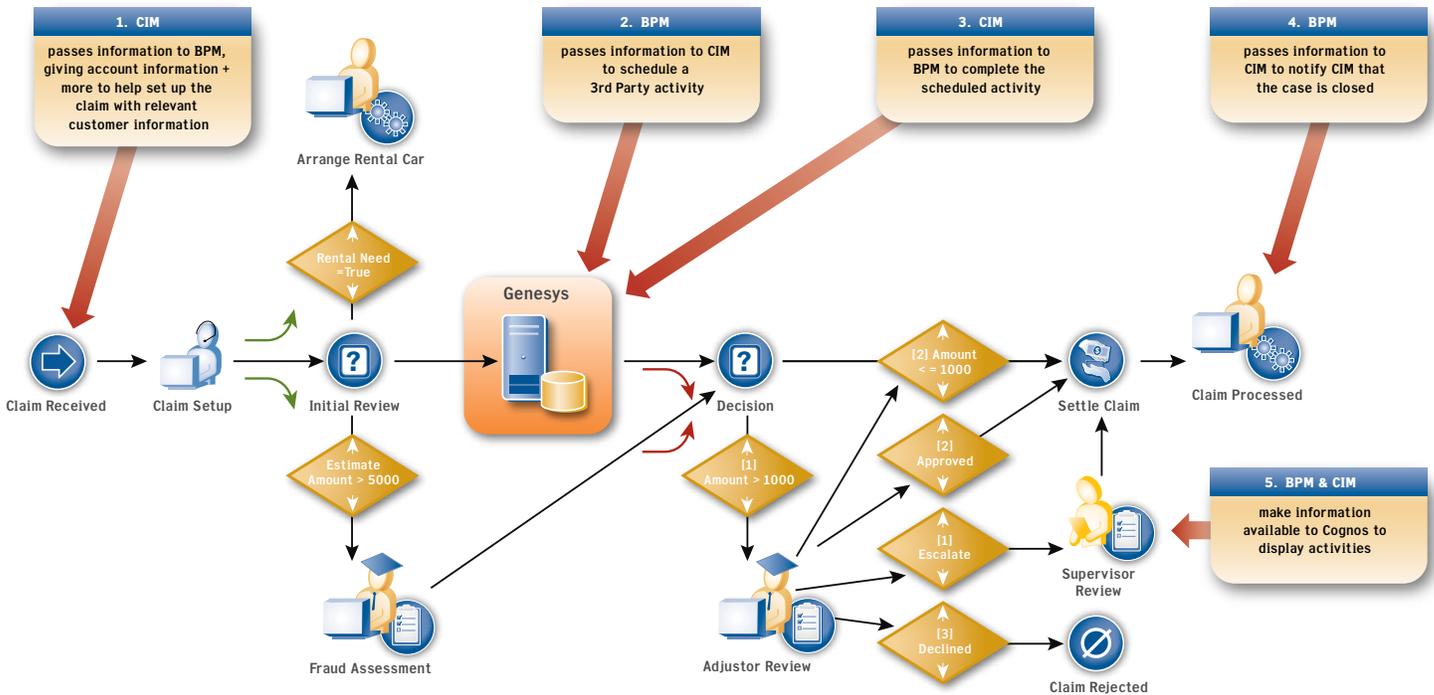


Figure 8. Technical Implementation – High Level Example

1. GenesysVoice Platform collects data on the call, and pulls data from external sources such as a CRM system, and then populates the Attached Data fields in Genesys CIM Platform. This information is passed to Genesys Agent Desktop (GAD), and can be passed to FileNet BPM either by:
 - a. eForm — data is pushed from Genesys to populate a FileNet eForm
 - b. JavaServer Page (JSP) — data is pushed from Genesys
2. FileNet BPM schedules an activity for Genesys by popping into a queue (or in-basket) the following:
 - a. Unique ID
 - b. Activity Name (e.g. Outbound call)
 - c. Properties (e.g. Who, What, When, Priority, Skill Required)
 - d. URL of step processor (e.g. process that will perform the activity)

3. Genesys 3rd Party Media routing executes a sub-process with the information supplied from the FileNet BPM queue, and returns a value or set of values to FileNet BPM in the same queue with the same Unique ID, which FileNet BPM is monitoring.
4. FileNet BPM is the master process for handling the customer interaction and business workflow — and for completeness at the end of the process, FileNet BPM notifies Genesys 3rd Party Media routing that the activity has been completed.
5. FileNet BPM makes process data available through the Process Analyzer server in a readily accessible data cube. Genesys stores metrics on CIM activities that are also readily available. These data are available to third-party User Interface and Business Intelligence tools, such as Cognos BI or BAM and Genesys Workforce Management, to schedule future interactions and to display both historical and current statistics to management.

Information from the integrated FileNet BPM and Genesys CIM solution can be used for runtime assessment of how efficiently the integrated front office and back office are performing and, most importantly, for “predictive scheduling” to plan for changing workloads and to optimize available resources to handle changing business conditions.

Other issues to consider in implementation:

- Genesys and IBM recommend the use of Professional Services to facilitate the implementation of Security Credentials passing from Genesys to IBM and vice versa to ensure a seamless workplace experience for agents (eliminating unnecessary log-ins)
- Transactional Volume — this *push* single-queue model works well for the FileNet BPM / Genesys CIM solution and can handle hundreds of thousands or even millions of transactions; for larger volumes, it may be appropriate to *push* multiple queues

2. Agent Desktop

Both Genesys CIM and IBM FileNet BPM are open architectures that enable the use of alternative desktops by front office and back office agents. The open architecture facilitates solution integration into the customer's current environment, and can be implemented as an incremental upgrade rather than as a “rip-and-replace” solution.

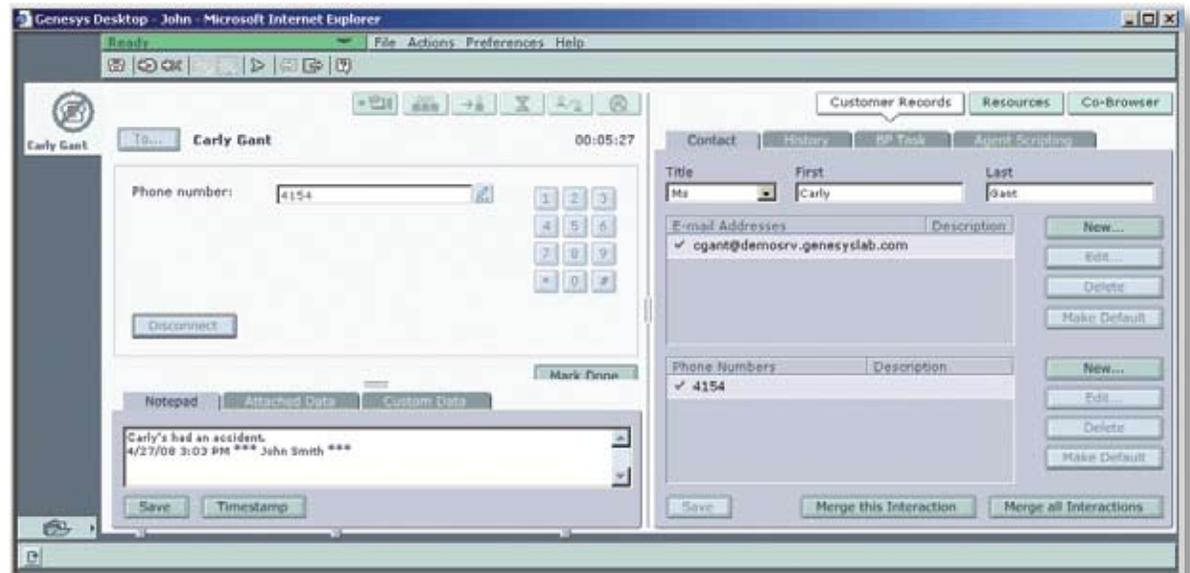


Figure 9. *Genesys Agent Desktop (GAD)*

Customer interaction information gathered by the IVR and other Genesys processes (“attached data”) used by the Genesys Agent Desktop (or any other Genesys-enabled desktop application) can be passed seamlessly to an IBM FileNet eForm for the active case, when initiated by the agent. Then, the eForm, as Active Content within IBM FileNet BPM, automatically starts a Business Process Workflow.

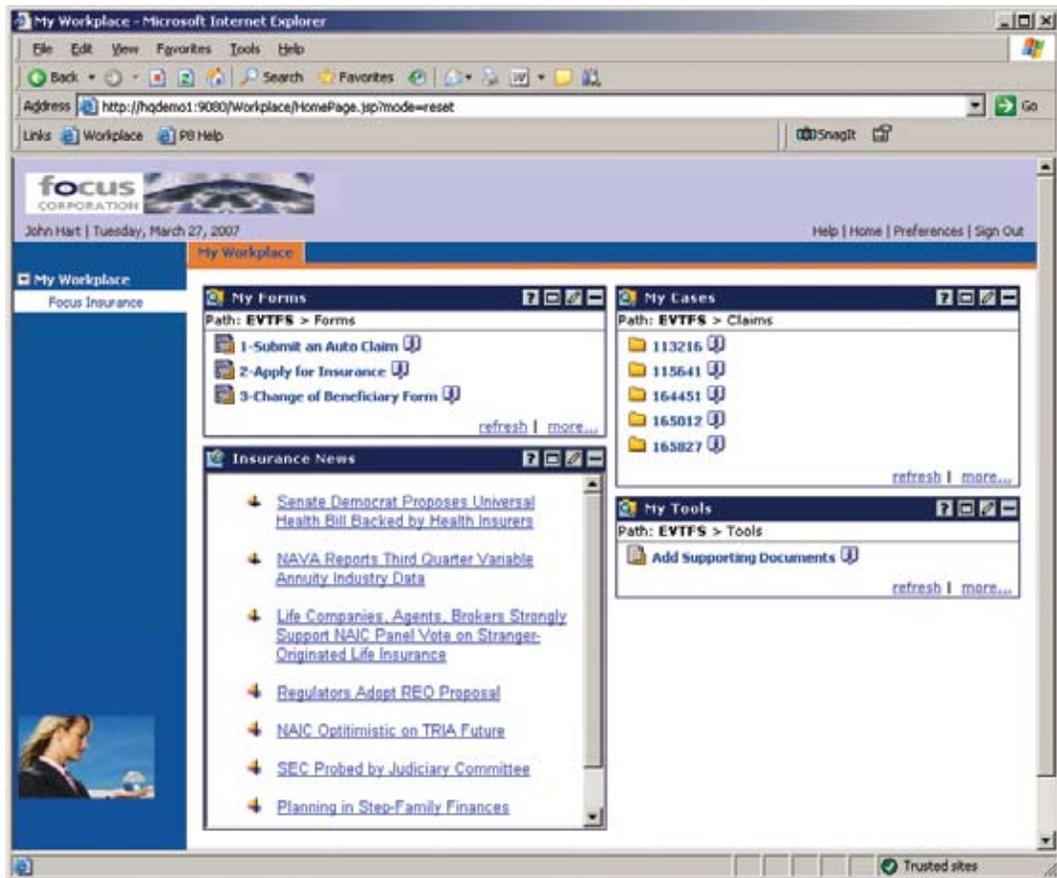


Figure 10. IBM FileNet Workplace

The IBM FileNet Workplace serves as a multi-purpose desktop for the Agent to manage his active cases, and access pertinent information.

3. Integration with other Products

Many third-party tools can be used in conjunction with both Genesys CIM and IBM FileNet BPM. Areas where IBM and Genesys have experience include:

1. Gateway + ACD/PBX: Alcatel-Lucent, Aspect, Avaya, Cisco Systems, Genesys, and Nortel Networks
2. IVR: Avaya, Genesys, IBM WebSphere, and Nortel Networks
3. Databases: DB2, MS SQL, Oracle
4. Front Office Applications: Chordiant, Curam, E.piphany, Guidewire, Microsoft Office SharePoint, Oracle, PeopleSoft, Siebel, SAP

Genesys and IBM FileNet BPM solutions can be integrated with other IBM offerings, such as IBM WebSphere Process Server. For example, an insurance business process might call a composite BPEL-based service running in WebSphere Process Server for fraud detection:

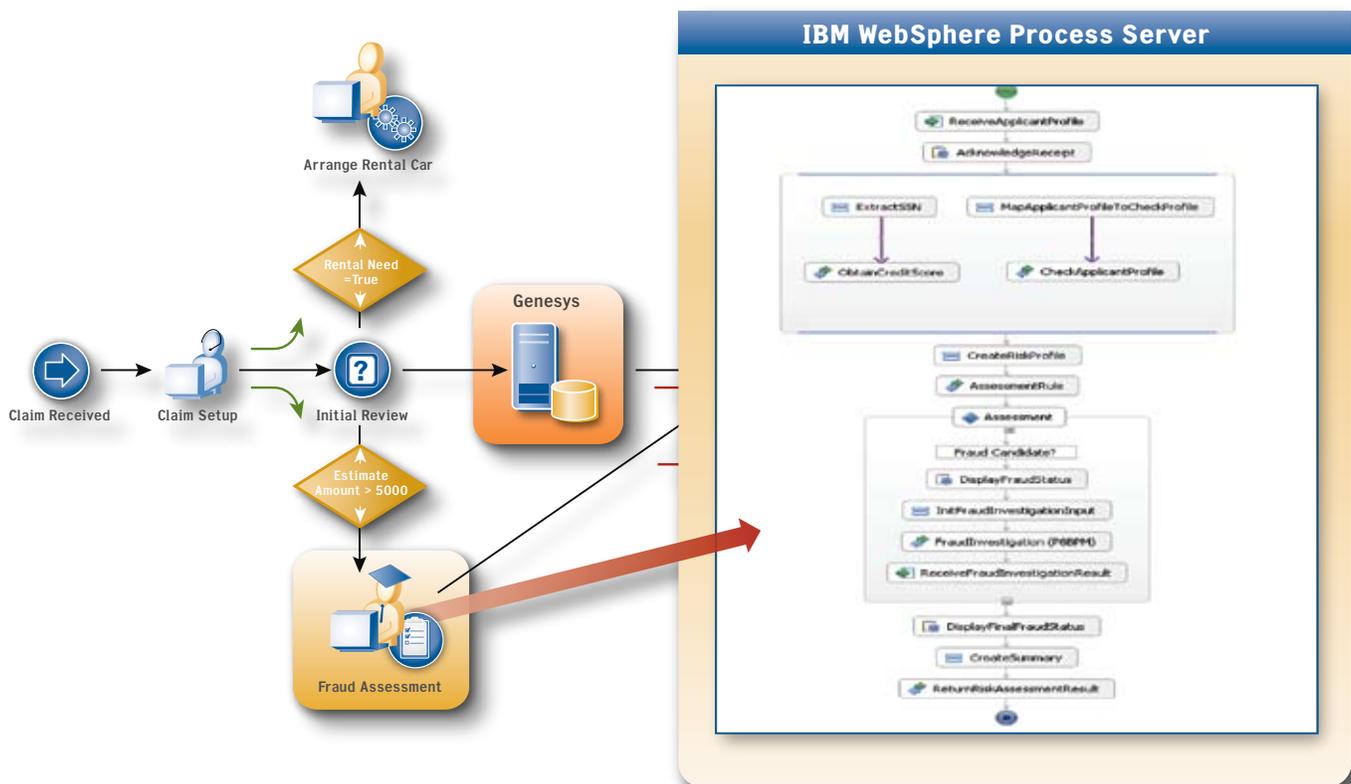


Figure 11. Integrating IBM WebSphere Process Server (WPS)

4. Monitoring and Reporting

Any successful implementation of Genesys CIM and IBM FileNet BPM requires effective tracking of Key Performance Indicators (KPIs) to ensure that SLAs are being met. By integrating CIM and BPM it is possible to track how customer interactions are handled — from the initial call through to the final resolution of a customer interaction.

Genesys and IBM ECM support a variety of tools for this purpose:

4.1 Genesys CCPulse+ leverages the 3rd Party Media-based statistics:

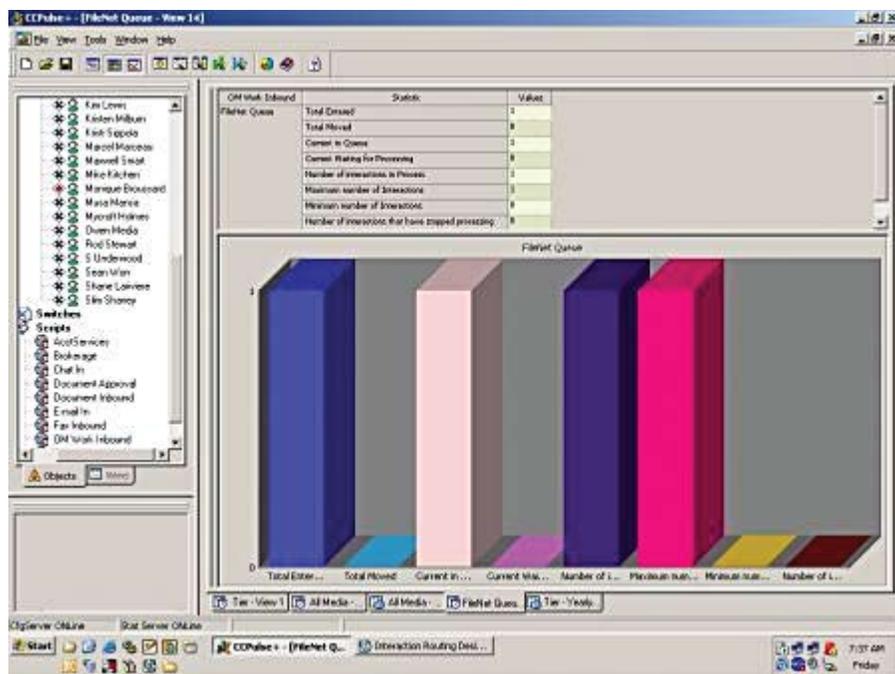


Figure 12. Genesys CCPulse+

4.2 Genesys Workflow Monitor allows an overview of individual interactions within the CIM queues

4.3 IBM FileNet Process Analyzer is an OLAP-based analytics and reporting engine that mines the process execution and simulation data stored in datacubes by the BPM process engine. An OLAP-enabled reporting tool such as MS Excel can be used for customized reports and analytics.

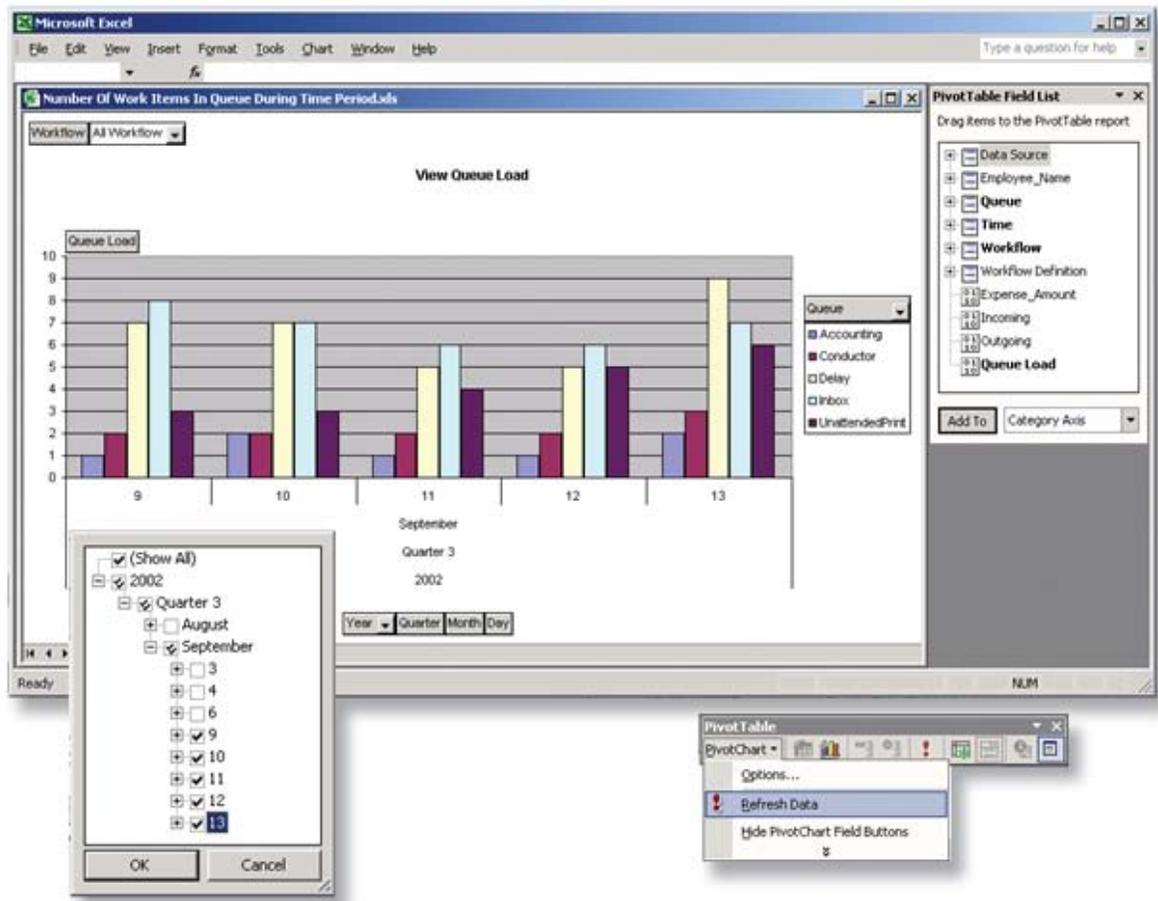


Figure 13. IBM FileNet Process Analyzer

4.4 IBM FileNet Business Activity Monitor (BAM) enables operational performance management by providing near real-time monitoring of process-related events in the context of a visual and personalized dashboard. It receives events from FileNet Process Analyzer and other event sources such as Genesys CIM, and renders these as metrics

such as KPIs using various visual widgets and metaphors. Specific events, such as a metric crossing a threshold, can be tied to an action (e.g. launch a process or invoke a service) in order to mitigate risk or take advantage of an opportunity. BAM greatly enhances visibility and can help meet process SLAs.



Figure 14. IBM FileNet Business Activity Monitor (BAM)

5. Server Configuration Issues

For recommendations on server sizing, storage, and network traffic, please refer to the relevant product manuals.

6. High Availability and Disaster Recovery

Genesys CIM and IBM FileNet BPM can and should be configured for both high availability (HA) and for disaster recovery (DR) as, in most situations, these customer-facing applications are mission critical where performance problems can have an enormous impact on customer service SLAs and relations. This paper does not seek to answer the question of what is the optimum hardware and software configuration for HA/DR; this is best answered on a case-by-case basis, and implementers should read the relevant manuals or seek assistance from IBM and/or Genesys Professional Services.

7. References and More Information

For more technical information on any of the products referenced here, please visit:

www.genesyslab.com

www.ibm.com/software/data/ecm

Business Implementation Issues

1. Agent Profiling and Workforce Optimization

Offering an integrated Genesys CIM and IBM FileNet BPM desktop is an integral part of workforce optimization. By enabling key agents with more information, they can be empowered to perform additional tasks and more effectively handle customer interactions. However, this solution may be more appropriate for experienced agents than for inexperienced agents, as there is a danger of information overload; therefore, typical implementations have only the most experienced agents enabled with this technology.

2. Business Application Profiling

Integrating Genesys CIM and IBM FileNet BPM is a natural progression from well orchestrated silos of front office agents exploiting CIM and back office personnel effectively using BPM, to an integrated pool of agents, including outsourced resources, able to make the most of both technologies.

The integrated solution makes most sense where customers have multiple interactions with their agents to fulfill service requests, and where records are typically kept for extended periods, often years. Under these circumstances, Genesys CIM is able to dynamically allocate customer calls to the optimum resource, while IBM FileNet BPM is able to retrieve and display relevant documentation from storage quickly and efficiently, thus enabling a more effective response from the agent.

3. Compliance and Records Management

IBM FileNet BPM supports IBM FileNet Zero Click record declaration and other tools for compliance and records management purposes, so pertinent documents can be declared as records automatically. And, now that the customer interaction is recorded within BPM from start to finish, it is possible to both reduce the likelihood of litigation and the costs of complying with litigation when record discovery is required.

4. Up-Sell and Cross-Sell Opportunities

Because of the increased amount of information available on agents' desktops, it is possible for them to make the most appropriate offers to clients towards the end of a successful interaction when the client is more amenable to new offerings.

5. Training

To effectively enable contact center operators and back office workers to handle paperwork and take calls will require additional training, although this will not be relevant for all staff. In fact, a key success factor in the implementation of the joint solution will come from carefully selecting the right agents to train, and then changing their compensation to reflect their added responsibilities.

6. Competition — Other Front Office and Back Office Applications

Genesys and IBM are both leaders in their respective fields and have been partners for many years. Now, IBM and Genesys are partnering to jointly offer this best-of-breed solution.

While there are many other individual players in the market, as of August 2008 there were no other known solutions available with an integrated customer interaction management platform and a business process management platform for front and back office integration.

Return on Investment Analysis

Implementations of an integrated Genesys CIM and IBM FileNet BPM solution are tailored to specific needs and priorities, thus, a generic return on investment (ROI) analysis is of limited value. However, there are some common themes and benefits that indicate the achievable value available through this solution.

a. Front office agents (50% to be enabled)	400 - 600
b. Back office personnel (all to be enabled for CIM)	200 - 300
c. Additional GN CIM seats (200 to 300 at \$500 per seat)	= \$100,000 to \$150,000
d. Additional FN BPM seats (200 to 300 at \$500 per seat)	= \$100,000 to \$150,000
e. Professional Services implementation	= \$500,000 to \$1.0M
f. Total investment	= \$700,000 to \$1.3M
g. Savings from increased calls handled or reduced staffing 10% to 15% of staff at \$30,000 per person	= \$1.2M to \$1.8M p.a.
h. Payback	= 7 to 13 months
i. ROI (assuming 3 years of benefits)	= 75% to 160%

For a more specific ROI analysis, Genesys and IBM recommend having a Business Value Assessment performed.

Business Value Assessment

Genesys and IBM offer a Business Value Assessment (BVA) that identifies the business benefits and ROI information required to make the business case to justify the project. Typically, the review of front office and back office processes takes three days onsite, plus one day of analysis and report preparation, and concludes with a formal presentation to the customer. The on-site portion of this work is performed at the customer's designated facility by a qualified Genesys Business Consultant and an IBM ECM expert.

A BVA's key deliverable is the Assessment Report which includes:

- Preliminary workflow analysis of processes — including up to five mutually agreed, standard processes/procedures
- A listing of the information that will be passed between the Genesys CIM and IBM FileNet BPM
- A listing of key metrics that will be monitored and reported on for customer interactions
- An analysis of how customer interactions will be tracked and managed by IBM FileNet BPM in terms of documentation flow, plus analysis of outbound and inbound interaction handling and how information can be made readily available to agents
- A proposal, with timeline, on how IBM and Genesys would plan to implement a comprehensive solution with information exchange between IBM FileNet BPM and Genesys CIM
- A recommendation on the information to be made available to agents and supervisory staff, including how to make that information readily usable (such as via phone, e-mail, Web interface, agent desktop, reports, and so on)

The participation of key functional areas within the customer organization is critical to ensuring a successful BVA. The key resources across the organization and associated information are identified in the initial proposal and plan for the BVA.

For more details on a BVA, please contact your local Genesys and/or IBM ECM representative.

Conclusion

The key to surviving, and thriving, in today's competitive business environment is recognizing that delivering a superior customer experience is paramount. Therefore, companies must integrate their front and back office processes so that they not only provide well orchestrated customer service activities that expedite the handling of interactions from beginning to end, but that they also fully optimize the use of resources and personnel. The integrated Genesys CIM and IBM FileNet BPM solution is designed to achieve this unification and balance.

Companies that understand the value of being customer-centric and resource efficient would be well served to closely assess the bottom line benefits of this solution for the operational and cost savings it delivers from balancing front office and back office workloads, coupled with the competitive and strategic value of improving customer satisfaction and loyalty.

For more information, contact your IBM or Genesys representative, or visit:

www.ibm.com/solutions/genesys

www.genesyslab.com

About IBM ECM

IBM's Enterprise Content Management (ECM) software enables the world's top companies to make better decisions, faster. As the market leader in content, process, compliance, and search/discovery software, IBM ECM delivers a broad set of mission-critical solutions that help solve today's most difficult business challenges: managing unstructured content, optimizing business processes, and helping satisfy complex compliance requirements through an integrated information infrastructure. More than 13,000 global companies, organizations, and governments rely on IBM ECM to improve performance and remain competitive through innovation. IBM ECM combines Business Process Management capabilities with Content Management to activate content in business applications and execute event driven, information-related decisions, helping organizations make the right decision with the right information the first time.

IBM FileNet ECM and BPM capabilities have been recognized by independent analyst firms as leaders in a number of categories. Please contact us for more information on the latest evaluations.

IBM & Genesys Alliance

IBM has been a leading implementation partner of Genesys since 1999, and a strategic alliance partner since 2001, completing more than 100 projects and deploying more than 13,000 Genesys seats worldwide. IBM and Genesys have worked together to optimize the Genesys solutions for IBM platforms, including both hardware and software brands. IBM and Genesys offer a full range of services from Systems Integration to Strategic Outsourcing.

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Genesys Worldwide

Genesys, an Alcatel-Lucent company, is the world's leading provider of contact center and customer service management software — with more than 4,000 customers in 80 countries. Genesys software directs more than 100 million interactions every day, dynamically connecting customers with the right resources — self-service or assisted-service — to fulfill customer requests, optimize customer care goals and efficiently use agent resources. Genesys helps organizations drive contact center efficiency, stop customer frustration and accelerate business innovation.

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